

# RESOLVING PROBLEM HOST BIBLIOGRAPHIC MIGRATION DATA IN ALMA USING A BATCH PROCESS

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SCAN FOR PRESENTATION  
RECORDING ON THIS TOPIC:



## BACKGROUND

- In 2019, the University of Leeds migrated from Sierra to Alma, creating over 10,500 “host bibliographic records”
- Manual metadata clean-up was slow; over 6,200 records remained before this project began in 2025
- The project aimed to streamline and automate the process using batch tools

## KEY TERMS

### Host Bibliographic Record (Host Bib Record):

Container record created during migration linking multiple related titles via 774 MARC21 fields. The shared physical items are also linked to this Host Bib Record

### Main Title Bib:

Represents the overarching title bib record (in Phase One these were journal titles, plan to deal with bound-withs next)

### Individual Title Bib:

Represents a specific journal volume bib record within the main journal title

## Migrated Situation (Problematic State)

### Host Bib Record

- 774 Marc field → Main Title Bib
- 774 Marc field(s) → Individual Title Bib(s)

### Host Holdings Record

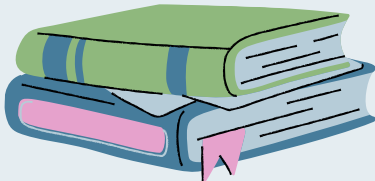
### Item(s)

Main Title Bib  
(No link to Individual Title Bib or item)

Individual Title Bib  
(No link to Main Title Bib or item)

## ISSUES BEFORE FIX

- Items not clearly linked to correct Main Title or Individual Title Bib
- Relationships between bib records were unclear
- Discovery display in Primo VE was confusing
- Cataloguing and fulfilment workflows disrupted
- Increased queries from users and library staff



## LIBRARY USER VIEW BEFORE FIX



Host bibliographic record for boundwith item barcode 30106017571372  
Available at Offsite Store: Hillary Place Store

Location

Request Other Issue

BACK TO LOCATIONS AND CLASSMARKS

LOCATION ITEMS

Offsite Store

Available

Hillary Place Store

Item in place (0 requests)

7 Days Loan

Material Type: Book

Location: Offsite Store: Hillary Place Store

Barcode: 30106017571372

Request

Details

Title

Host bibliographic record for boundwith item barcode 30106017571372

Related titles

Units: British journal of sociology of education. >

Units: Pierre Bourdieu's sociology of education: the theory of practice and the practice of theory. >

Source

Library Catalogue

Send to

READ LIST

EMAIL

CITATION

EXPORT BIBTEX

REPORTS

ENDNOTE ONLINE

EXPORT RIS (ENDNOTE)

PRINT

PERMALINK

## METHODOLOGY

### Step 1: Data Extraction and Preparation Alma Analytics:

- Used to identify Host Bibliographic Records needing correction
- A template report was run to extract relevant records
- The analytics report was exported to Excel for further manipulation

### Excel:

- Data was checked and sorted to ensure Main Title Bibs and Individual Title Bibs were correctly ordered
- Manual checks and VBA macros were used to swap data where necessary, ensuring accuracy before proceeding

### Step 2: Data Cleaning and 773 Field Creation Excel Data Tidying:

- Unwanted information removed using Find and Replace and Conditional Formatting
- New columns were created for Individual Title and MMS ID
- Concatenation formula was used to build the correct 773 MARC field for each record, linking Individual Title Bibs to Main Title Bibs and item barcodes

### Step 3: MARC Field Integration

#### MarcEdit:

- Excel data was formatted for MARC standards and imported into MarcEdit to create bibliographic records
- Fields were mapped and checked for correct formatting
- The final output was a MARC binary file (.mrc) ready for import into Alma

### Step 4: Batch Import Update

#### Alma Sandbox Testing:

- Merge rule was created and tested
- Import profile was set up to match records by MMS ID and overlay only the 773 field
- The .mrc file was imported, and results were monitored for accuracy

### Step 5: Item Relinking

#### Alma Sets:

- Sets of items to be relinked were created, based on Main Title MMS IDs
- Items were relinked from Host Bib Records to Main Title Bibs
- Host Bib Records were deleted once all items were moved
- Final checks ensured all data matched and displayed correctly in Primo

## LIBRARY USER VIEW AFTER FIX

British journal of sociology of education.  
Available at Offsite Store: Hillary Place Store: Store JB08 Education 0 BR1

Search inside  
Search for articles within this journal  
Article title or keyword

Location  
Request Other Issue  
BACK TO LOCATIONS AND CLASSMARKS

LOCATION ITEMS

Offsite Store  
Available, Hillary Place Store: Store JB08 Education 0 BR1  
Summary holdings: v.18 (1899-1900) (primary)  
Notes: Print

Item in place (0 requests) v.18, 1907  
7 Days Loan  
Material Type: Issue  
Location: Offsite Store: Hillary Place Store: Store JB08 Education 0 BR1  
Barcode: 30106011314295

Item in place (0 requests) v.19, 1908  
7 Days Loan

Item in place (0 requests) v.20, 1909  
7 Days Loan

Item in place (0 requests) v.21, 2000  
7 Days Loan

Item in place (0 requests) v.22, 2001  
7 Days Loan

Item in place (0 requests) v.23, 2002  
7 Days Loan

SHOW MORE ITEMS

Details  
Title: British journal of sociology of education.  
Publisher: Oxford, Carfax.  
Related titles: Units: Pierre Bourdieu's sociology of education: the theory of practice and the practice of theory. >  
Units: The sociology of the curriculum. >  
Available in other form: British journal of sociology of education (Online). >

## BENEFITS

- Host Bib Record is deleted = bibliographic structure is now clear
- Call numbers are visible
- Improved resource discoverability in Primo
- Lowered risk of human error
- Improved staff skills development

## IMPACT

- Fixed 803 Host Bib Records in 2 months (previously averaged 760 per year using a manual process)
- Added 1,019 new 773 fields
- New process is 6x faster than manual process
- Saved approx. 10 months per 800 records

## Resolution (Final State)

### Main Title Bib Record

773 field

Individual Title Bib(s)  
773 Marc field → links to Main Title Bib and Item

### Holding

### Item(s)

773 field links

Host Bib Record  
DELETED