



Cataloging and Working with Physical Inventory

Ex Libris Professional Services

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Glossary of Terms

Catalog – The repository that contains all descriptive metadata managed by a library, institutions, consortium or community. The Institution Catalog contains the institution's locally-owned records. The Community Catalog contains records provided to all institutions, by Ex Libris or those that are contributed by other Alma institutions. The Network Catalog contains records centrally-managed in a Network Zone.

MD Editor – Alma's Metadata Editor for the creation and maintenance of MARC21 Bibliographic and Holding records, as well as CNMARC, KORMARC, OAI MARC21 and UNIMARC. Dublin Core records may also be created and maintained.

MMS ID – Metadata Management System identifier for linking a holdings record to a bibliographic record.

MARC21 – Standard for the representation of bibliographic and related information in machine-readable form.

CNMARC – Chinese standard for the representation and communication of bibliographic information in machine-readable form.

KORMARC – Korean standard for the representation and communication of bibliographic information in machine-readable form.

OAI MARC21 – Standard defined by the Open Archives Initiative for structured metadata in XML format.

UNIMARC – An international standard that accepts records created in any MARC format as developed and supported by the International Federation of Library Association.

Dublin Core – Standard for the representation of metadata records such as for web resources, videos, images, art works.

Enhance the Record – Runs configured normalization routines to correct or update metadata records; for example, sorting a record's fields, removing empty fields, or stripping out fields containing order information.

Inventory – Resources that are owned or licensed by or associated with a particular library, institution, or consortium; includes repository holdings records linked to a bibliographic record and the items linked to the holding record(s).

Release All Records – When a cataloger selects a bibliographic record for editing, that record is 'checked-out' from the Repository and appears in the cataloger's **Records** pane (on the left side

of the editor screen). The record is now unavailable to be edited by other catalogers, although they may still view the record in read-only mode. When the current cataloger completes their work, the record is released, and becomes available once again for editing by other catalogers.

Alma Glossary – For other terms, go to

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/120Alma_Glossary](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/120Alma_Glossary)

Open the Metadata Editor

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Open the Metadata Editor in Alma <ul style="list-style-type: none"> ○ Without a Bib record ○ With a Bib record 	
<p>! • Note: The “Edit” option appears and brings you into the Metadata Editor if you have a Cataloging user role.</p> <p>! • Note: About Editors: MARC21 Bib and Dublin Core use the same editing features.</p>	<ol style="list-style-type: none"> 1. To open the Metadata Editor <u>without</u> a Bib record, go to the Resources menu and select Open Metadata Editor under the <i>Cataloging</i> submenu. 2. Review the menus and tabs. Click on the Exit button, located at the far right to close the Metadata Editor.
	<ol style="list-style-type: none"> 3. To open the Metadata Editor <u>with</u> a Bib record, perform an <i>All titles – Keywords</i> search for the terms, modern history or global environmental politics or terms that you prefer. From the results that display, choose a record for a physical resource and click on the Edit Record button located inline to the right to open this record in the Metadata Editor. 4. Review the menus and tabs. Click on the Exit button, located at the far right to close the Metadata Editor. The operator is asked to confirm if the draft record should be saved (select No) <u>and</u> if the record should be released. Selecting <i>No</i> retains the record in the operator’s queue for editing at another time; selecting <i>Yes</i> makes the record available for any Cataloging operator.

Edit/Update an Existing Bibliographic Record

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Edit/update an existing metadata record • Use full screen option to display the main editing pane in the entire page • Create multiple versions of the record – save more than once 	
	<ol style="list-style-type: none"> 1. Begin by performing an <i>All titles – Keywords</i> search for the terms, children music or business etiquette or terms that you prefer.

<p>! Note: Alerts appear in the form of warnings or errors. Warnings are “nice to fix” notifications. Errors are “required to fix” notification before the record may be saved.</p>	<ol style="list-style-type: none"> 2. From the results that display, choose a record for a physical resource and click on the Edit Record button located inline to the right to open this record in the Metadata Editor. 3. Press F7 or click on the full screen icon to see the record in full-screen mode. Press F7 again to exit full-screen mode. 4. Place the cursor in any field and press F8 to insert a new field. Enter 590 \$\$a This record edited by [your name]. <i>Save the record.</i> 5. To another MARC field in this record, press F9 to add a new subfield, \$\$b, and enter your initials. <i>Save the record.</i> 6. Select any MARC field and delete it by choosing Edit – Remove Field or pressing Ctrl+F6. <i>Save the record.</i> 7. Place the cursor in the 008 field and open the Form Editor by choosing Edit – Open Form Editor or pressing Ctrl+F. Missing data is identified by bolded entries in the form. Make any corrections as required. Close the Form Editor by pressing ESC. <i>Save the record.</i> 8. Are any Alerts displaying that there are errors or missing elements? If so, correct the problem and <i>Save the record.</i>
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Working with Authority Records

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • View authority records for any authority-controlled field • Use Authority control for a name (1xx) field or subject (6xx) 	
<p>! Note: Alma provides a set of authority records that are updated and maintained regularly by Ex Libris in the Community Zone. More than 20 vocabularies are available.</p>	<ol style="list-style-type: none"> 1. To view to an authority record from an authority-controlled field, begin by going to the 100 field or any other authority-controlled field. 2. Press F3 for an opportunity to View the authority record that is associated with the author. 3. If required, click on Select to update the authorized heading. 4. Otherwise, click on Cancel to return to the Bib record. <i>Save the record.</i>

View Record Versions

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • View previous versions of the record being edited • Restore an earlier version of the record being edited 	
	<ol style="list-style-type: none"> 1. Using the edited MARC21 Bib record highlighted in navigation pane, click on the Tools menu. 2. Click on View Versions. 3. A split screen displays. In the right pane, you will see versions of the record that you are editing. Each version shows date and time of editing. 4. Restore to a previous version by clicking Restore.

Split Editor Mode

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • View two records in split editor mode • Exit split editor mode 	
<p>! • Note: Selecting the MARC21 Bibliographic record and linked holding record can be helpful for editing and review in split editor mode.</p>	<ol style="list-style-type: none"> 1. Have more than one record open under Records tab in the navigation pane. [If necessary, perform another <i>all titles</i> repository or quick search and click on the Edit Record button to open another record in Metadata Editor.] 2. With one record open/displayed in the editor, click on the Edit menu and choose Split Editor (F6). 3. Click on the blank pane to indicate that this is where you want to open the second record. 4. Choose a different record under Records tab of the navigation pane and view both records side by side. 5. Exit split editor mode by placing a cursor in the pane for one record and toggle off the split screen by pressing the Split Editor function. The selected record should now be the only record displayed in the screen.

Validity Check

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Use validity checks to review and correct records 	
<p>! Note: Clicking on any errors or warnings in the Alerts tab will link directly to the problematic field to enhance efficient workflow.</p> <p>On the Alerts tab, an entry highlighted red is an error, meaning a correction is mandatory in order to save the record. Yellow highlight is a warning only and may be overridden.</p> <p>Refer to the Metadata Editor Shortcuts document for details on all shortcuts.</p>	<ol style="list-style-type: none"> 1. Search for and retrieve any MARC21 Bib record and open it in the Metadata Editor. 2. For the purpose of this exercise, change the MARC field 245 to 255. 3. Click on the <i>Tools</i> menu and select Validity Check. 4. At the bottom of the screen, in the Alerts tab, you will see a message about the missing 245 field. 5. Try to save the record and notice the message in the Alerts tab: <ul style="list-style-type: none"> 245 <i>Mandatory field 245 is missing</i> 6. Change field 255 back to 245 and <i>Save the record</i>.

Copy Cataloging

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Search for and import a record using Search External Resources • Save the record to the repository 	
<p>! • Note: WorldCat will work perfectly well if you add your institution's credentials to the appropriate external resource.</p> <p>! • Note: When adding a record, remember to click on the Save icon or use the Ctrl + S shortcut when done to complete the addition of the metadata record.</p> <p>! • Note: Whenever saving a Bib record, it remains locked by you for editing. To save and <i>release</i> the record when you are finished with it, select File > Save and Release record, or use the shortcut, Ctrl+Alt+R. The same is true for holdings records.</p>	<ol style="list-style-type: none"> 1. From Alma Menu (F2) open the Metadata Editor. 2. From the <i>Tools menu</i> select Search External Resources. <i>[Alternate method: From the persistent menu, go to Resources Cataloging > Search External Resources.]</i> 3. In the Search Cataloging Profile drop-down menu, select the external resource to search, e.g., British Library, Library of Congress, WorldCat, etc. 4. Enter a title, ISBN, or other identifier to search for a record. [If preferred, refer to the sample titles listed in Appendix B.] Click on the Search button at the bottom of the search form. 5. Review the records in the results list and select a record by either clicking on the Title or the View link. 6. After viewing the record, click the Back to Results button. 7. Click the Import button for the record. This will import the bib record into your repository. You can then make edits to it as needed. 8. Save the record by either clicking the Save icon or going to File > Save Record, or using the shortcut (Ctrl + S). <p>When attempting to save the record, Alma will alert you if there are matching records already in the catalog. If a Matched Records pop-up box displays, click "Yes" to see the matching records. Other import options you may see if there is a matching record:</p> <p><i>Copy & Overlay:</i> Import the record, completely overlaying fields from the record found in External search onto the existing record in your repository.</p>

	<p><i>Copy & Merge:</i> Import the record, overlaying fields from the record from External search, but keeping the fields specified in a Merge profile. You can preview the record before the merge happens using the Merge Preview link/button.</p> <p>9. Keep this record open in the Metadata Editor.</p>
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Add a Holdings Record

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> Add a holdings record to an existing MARC21 Bib record 													
<p>! • Note: If viewing a holding record that already exists for the metadata record, the menu option in Tools > MARC21 Holdings is Add Another Holding (instead of Add Holding).</p> <p>! • Note: See Appendix A for details on libraries and locations in the Alma sandbox.</p>	<ol style="list-style-type: none"> Using the Bib record added to the repository in the previous exercise, click on the Split Editor icon and select the pane with the record in it to focus on it within the split screen. From the <i>Tools</i> menu, go to MARC21 Bibliographic > Add holdings. Alternatively, use the shortcut Ctrl+Alt+H or the Holdings icon. In the 852 field add a library code and collection at the minimum. Example for Main Library field 852 \$\$b MAIN \$c main <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Library Description</th> <th style="text-align: left;">Library code \$\$b</th> <th style="text-align: left;">Collection/location</th> </tr> </thead> <tbody> <tr> <td>Main Stacks</td> <td>\$\$b MAIN</td> <td>\$\$c main</td> </tr> <tr> <td>Main Juvenile Education Stacks</td> <td>\$\$b MAIN</td> <td>\$\$c edu-juv</td> </tr> <tr> <td>Main Reference Stacks</td> <td>\$\$b MAIN</td> <td>\$\$c reference</td> </tr> </tbody> </table> <ol style="list-style-type: none"> <i>Save the Holdings record.</i> 	Library Description	Library code \$\$b	Collection/location	Main Stacks	\$\$b MAIN	\$\$c main	Main Juvenile Education Stacks	\$\$b MAIN	\$\$c edu-juv	Main Reference Stacks	\$\$b MAIN	\$\$c reference
Library Description	Library code \$\$b	Collection/location											
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Main Reference Stacks	\$\$b MAIN	\$\$c reference											

Add an Item Record

Goals of this exercise:	
<ul style="list-style-type: none">• Add a physical item record to an existing holding record	
<p>! Note: The barcode must be unique.</p> <p>! Note: Multiple Item records may be attached to one Holdings record. These records are disambiguated by a unique barcode and may also include a unique Copy ID.</p>	<ol style="list-style-type: none">1. Continue working with the Holdings record created in the previous example and go to the <i>Tools</i> menu, MARC21 Holdings > Add Item. [If a split editing screen is still displayed, click on the Holdings record to select it.] The <i>Physical Item Editor</i> displays, bringing along with it information about the title and location in the library.2. Add a Barcode and Copy ID = 1, change the material type, if appropriate, etc. If replacement cost is a field your institution uses, enter the relevant details. Click on the Save and Edit button to save the Item record.3. Scroll down in the Item record to view details about the <i>Permanent location</i> for this Item as well as the option to assign a <i>Temporary location</i>.4. <i>Save the Item record.</i>

Appendix A: Alma Sandbox Libraries and Locations

Library Name	Library Code	Location Name	Location Code
Graduate	GRAD	Graduate Library Stacks	grad
		Graduate Library Display Shelves	graddispla
		Foreign Language Collection	forlang
		Graduate Periodicals	gradper
		Graduate Reference	gradres
Main	MAIN	Government Documents	govdocs
		International Collection	internat
		Juvenile Education Collection	edu-juv
		Main Library	main
		Main Reference	reference
		Microform Room	microforms
		Media Collection	MEDIA
		New Books Display	display
		Offsite Storage	offsite
		Periodicals Room	per-room
		Rare Books	RARE
		Course Reserves	RESERVES
		Law	LAW
Periodicals Room	LAWPER		
Reference	LAWREF		
Stacks	LAWSTACKS		
Music	MUS	Music Library	music
		Music Periodicals	musicper
		Music Reference	musres
Science	BIO	Science Library	biology
		Science Course Reserves	SCICOURSE
		Science Lower Level	SCILOWER
		Science Periodicals	bioper
		Science Reference	biores

Appendix B: Sample Titles

Author	Title	ISBN
Sapolsky, Robert M.	Behave	978-0143110910
Achor, Shawn	The happiness advantage	978-0307591555
Kurson, Robert	Rocket men	978-0812988703
Rappaport, Helen	The race to save the Romanovs	978-1250151216
Evans, G. Edward	Managerial leadership for librarians	978-1440841712
Hendrix, Grady	Paperbacks from hell	978-1594749810
Grieser, Randy	The ordinary leader	978-1988617015
Doerr, John	Measure what matters	978-0525536222
Peters, Tom	The excellence dividend	978-0525434627
Vaidhyathan, Siva	Antisocial media	978-0190841164
Nabokov, Vladimir	Pale fire	978-0679723424
Banayan, Alex	The third door	978-0804136662
White, Edmund	The unpunished vice	978-1635571172
Jacobs, Jen	Road trips	978-1611802030
Platt, Stephen R.	Imperial twilight	978-0307961730