

# Cataloging and Working with Physical Inventory



#### **Resource Management User Roles**

- Catalog administrator
- Repository administrator
- Catalog manager
- Repository manager
- Cataloger and extended
- Collection inventory operator and extended
- Digital inventory operator and extended
- Electronic inventory operator and extended
- Physical inventory operator and extended





#### **Physical Records Data Structure**



Holdings record Science Library

#### Item record

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#### **Metadata Editor**



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#### Getting Started with the Metadata Editor

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#### **Metadata Editor**





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Menu	Functions			
File	Use to create and save records			
Edit	Use to modify records			
Tools	Numerous other features including options to add holdings and item records			
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#### **File Menu Details**

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#### **Authorities in Alma**

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	Montgomery and Elizabeth Marshall Thomas explores the minds, lives, and mysteries of animals as diverse as snails, house
	cats, hawks, sharks, dogs, lions, and even octopuses. Drawing on stories of animals both wild and domestic, the two authors,
	also best friends, created this book to put humans back into the animal world. The more we learn about what other animals
	think and do, they explain, the more we understand ourselves as animals, too. Writes Montgomery, "The list of attributes once
	thought to be unique to our species from using tools to waging war is not only rapidly shrinking, but starting to sound less
	and less impressive when we compare them with other animals' powers." With humor, empathy, and introspection, Montgomery
	and Thomas look into the lives of all kinds of creatures from man's best friend to the great white shark and examine the
	ways we connect with our fellow species. Both authors have devoted their lives to sharing the animal kingdom's magic with
	others, and their combined wisdom is an indispensable contribution to the field of animal literature. The book contains a
	foreword by Vicki Constantine Croke, author of the bestseller" \$\$c Provided by publisher.

- 650 0 \$\$a Animals
- 650 0 \$\$a Animal behavior.
- 650 7 \$\$a NATURE / Animals / General. \$\$2 bisacsh
- 650 7 \$\$a NATURE / Essays. \$\$2 bisacsh
- 650 7 \$\$a PETS / Essays. \$\$2 bisacsh
- 650 7 \$\$a NATURE / Animals / Wildlife. \$\$2 bisacsh
- 700 1 \$\$a Thomas, Elizabeth Marshall, \$\$d 1931- \$\$e author.
- 700 1 \$\$a Croke, Vicki Constantine, \$\$e writer of foreword.









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#### **MARC Field Help**

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Bibliographic	Working on - The philosophical ba (991546340000541), ( RECALCULATION (2016/07/08 10:30:07 CDT)	Created by import (2011/12/17 15:56:45 CST), Modified by OPR-
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## **MARC Field Help**

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#### **Form Editor**

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Use the Form Editor to make changes to Leader and control fields, 001-008

- Ctrl+F opens Form Editor
- Esc key closes form editor

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#### **Saving Records**

# New Save Draft Ctrl+Alt+S Save Record Ctrl+S Save and Release Record Ctrl+Alt+R Duplicate

Release Record Alt+Shift+R

Assign Record to Another Cataloger

Release Assignment

Save as Template

Reload Original Record

Delete Record Ctrl+D Copy to catalog Alma automatically saves drafts of records

To save records to the repository permanently, you must use the Save Record (Ctrl+S) function

Applies to both Bib and Holdings records

Save early and often!



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Ctrl+Q



#### Add a Holdings Record



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#### Add a Holdings Record

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#### Add a Holdings Record Via Template

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#### Add a Holdings Record Via Template

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#### **Other Metadata Editor Functions**



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#### **View Versions**

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#### **Locked Records**

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#### **Release Individual Records**

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#### **Release All Records**





#### **Set Management Tags**

Use set man	agement tags to control publishing, export, import of records
Suppress from Discovery	Do not publish to discovery; hide from view in discovery
Export to OCLC	Tags record to be included or excluded in OCLC synchronization
Force export to WorldCat	Causes Holdings records linked to Bibliographic records to be included in next export to OCLC
Brief Level ##	Identifies whether or not cataloging for Bib records is brief according to configuration



#### **Templates**

New

Edit

Delete

Duplicate

Contribute

Properties

#### Use a Template to...

- Create a new Bibliographic or Holdings record
- View properties

Create new templates by duplicating an existing one, editing, renaming

Templates may be edited and deleted





#### Inventory Information and Physical Item Editor



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#### **Inventory Information**

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Bibliographic	Working on - Versions of academic (9925741300521), Created by connie.braun (2014/11/12 08:32:17 CST), Modified by AlmaUser18 (2018/08/07 08:02:06 CDT)	Holdings(1) Portfolio(0) Representation(0)	Electronic Collection(0)
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#### **Inventory Search**

Physical items **\*** 

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- soul of an octopus

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1

Relink to another bibliographic record

Save and Edit Cancel

Save

Holdings	Science Library: Science Stat	cks; QL430.3.02 M66 2015			
Holdings ID				View all holdings	
Barcode	-	Item ID -		View all items	
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Chronology I

Description

Generate

#### Withdrawing Items



## Withdrawing Items

#### Last Item of this Holdings Deleted

Item has been successfully deleted

Last item(s) of Holdings record deleted or moved. What do you want to do with the holdings record?

) Don't change the holdings record

Delete the holdings record

Suppress the holdings record from discovery

Delete bibliographic record (unless other holdings are present)

Go



#### Wrap-Up



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#### Conclusion

- During this session, we looked at the Cataloging and Working with Physical Inventory
  - Data structure for physical resources
    Working in the Metadata Editor
  - Importing records from external sources
  - Adding inventory (Holdings and Items)
  - Withdrawing items
- Questions?





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