Alma Resource Management

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Introduction to Resource Management

Resource Management contains the following workflows/sections:

- **Using the Repository Search** - This section describes the way in which you can search the repository. For a detailed explanation, see **Using the Repository Search** on page **13**.
- **Metadata Management** - This section describes working with the MD Editor and searching external resources. For a detailed explanation, see **Metadata Management** on page **147**.
- **Inventory** - This section describes inventory management activities. For a detailed explanation, see **Inventory** on page **273**.
- **Managing Profiles for Record Import** – This section describes creating, editing, viewing, copying, deleting, and using import profiles, plus how to start new imports. For a detailed explanation, see **Managing Profiles for Record Imports** on page **511**.
- **Configuration** - This section describes the resource management configuration activities. For a detailed explanation, see **Configuring Resource Management** on page **611**.

2

Using the Repository Search

This section includes:

The Alma repository includes bibliographic records, authority records, and inventory records (holdings and items for physical material and portfolios for electronic resources). The repository consists of the Institution Zone (IZ) and the Community Zone (CZ) and, for collaborative network environments, the Network Zone (NZ). (Refer to **Working with the Repository Search and MD Editor in a Collaborative Network** on page **4** in the *Alma Collaborative Networks (Consortia) Guide* for more information regarding the NZ Repository Search facility.)

Information in the IZ is managed by the institution. Information in the CZ is managed by Ex Libris and synchronized with each IZ on a weekly schedule. Institutions are allowed to review any changes/updates that might be made in the IZ and take certain actions such as unlinking their IZ version from a CZ resource in order to create and maintain local overrides during regular synchronizations. (Refer to **Working with the Community Zone Updates Task List** on page **503** for more information about managing CZ updates made to the IZ.)

The Alma CZ incorporates global authority files from the Library of Congress (LC), the United States National Library of Medicine (NLM), and the German National Library (GND). The CZ also includes the Central KnowledgeBase (CKB). The CZ repository content enables validation of records (preferred/nonpreferred terms) and collection development (ordering physical and electronic resources). For additional information, refer to **Working with Authority Records** on page **184** and **Using the Repository Search Results List** on page **35**.

VIDEO:

For more information about the Community Zone, see the *Alma Community Zone Intro and Task List* video (14:10 mins).

For searches outside the Alma repository, see **Searching External Resources** on page **264**.

Repository Search Workflow

The following is an illustration of the repository search workflow that illustrates the way in which you can search the repository.

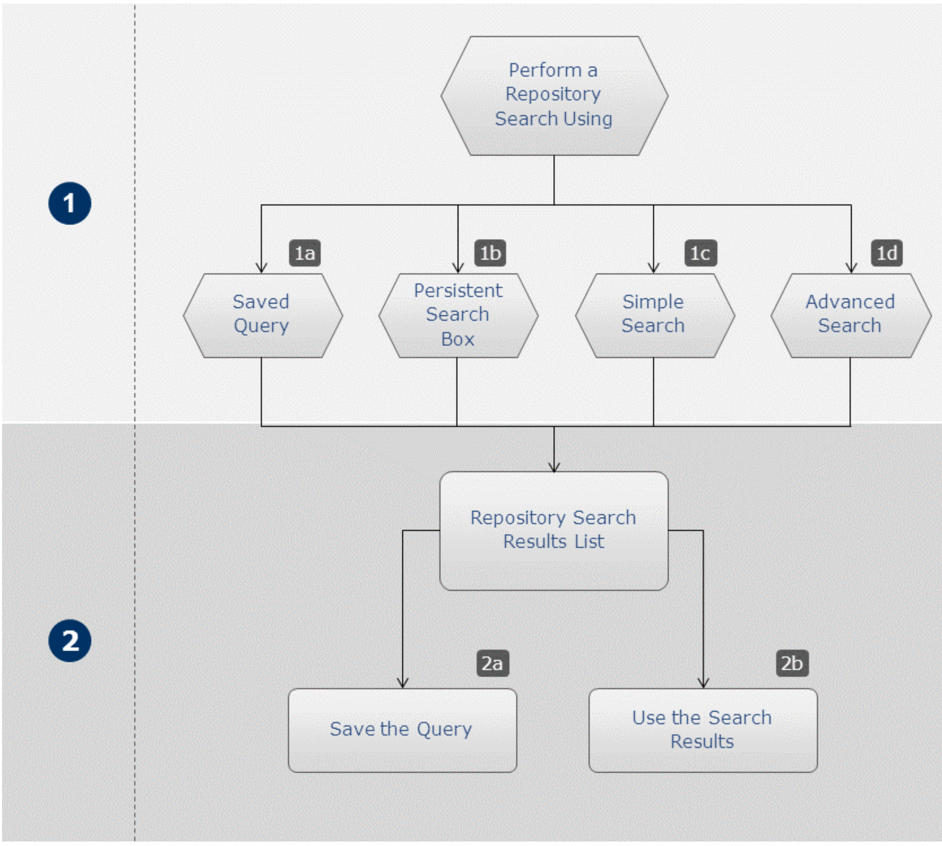


Figure 1: Repository Search Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. You can perform a repository search using one of the following options:
   a. Saved Query – After performing any repository search you have the option of saving the search query for future use (see **Saving Queries** on

page 32). Choosing this option enables you to use one of your previously saved queries (see **Using Saved Queries** on page 34), or you can use a query created by another user (see **Managing Search Queries and Sets** on page 81).

b Persistent Search Box – This option allows you to search the repository in the Keywords search index, similar to the simple search (see **Using the Simple Search** on page 19), as well as searching for users, vendors, and other items. It is available at all times on any page in Alma (see **Using the Persistent Search Box** on page 16).

c Simple Search – This option enables you to perform a simple search in the repository using three basic search criteria (see **Using the Simple Search** on page 19).

d Advanced Search – This option enables you to perform an advanced search containing multiple search criteria and conditions (see **Using the Advanced Search** on page 20).

2 The results of any repository search (using any of the options listed in step 1) are displayed in the results list page where you can:

a Save the Query – After performing a repository search you have the option of saving the search query for future use (see **Saving Queries** on page 32).

b Use the Search Results – Depending on the search criteria, the search results that are displayed offer many different options from viewing the bibliographic record to creating a PO line for the item (see **Using the Repository Search Results List** on page 35).

Searching in the Repository

PERMISSIONS:

Any user can search the repository.

The main access points to the Alma repository search are:

- The persistent search box located at the top of every page (see **Using the Persistent Search Box** on page 16)
- The Repository Search option under **Resource Management > Search and Sets** in the Alma main menu (see **Using the Alma Repository Search** on page 18)

VIDEO:
See the *Navigating And Searching In Alma* training WebEx sessions on using the search function within Alma. Note that you must be logged on to the Ex Libris Learning Center to access this session.

Using the Persistent Search Box

The Persistent Search box provides a simple search interface for searching the repository and other areas of Alma. Searching the repository with the Persistent Search box is the same as performing a simple search in the Keywords search index. For a list of the keyword indexes searched when using the persistent search box, see **Keyword Search Indexes** on page 136. Not selecting any option from the drop-down list is the same as selecting **All titles**.

To use the Persistent Search box:

1 At the top of any page, select the required presearch criteria from the **Persistent Search** drop-down list.

The following is an example of the Persistent Search box and the presearch criteria available.

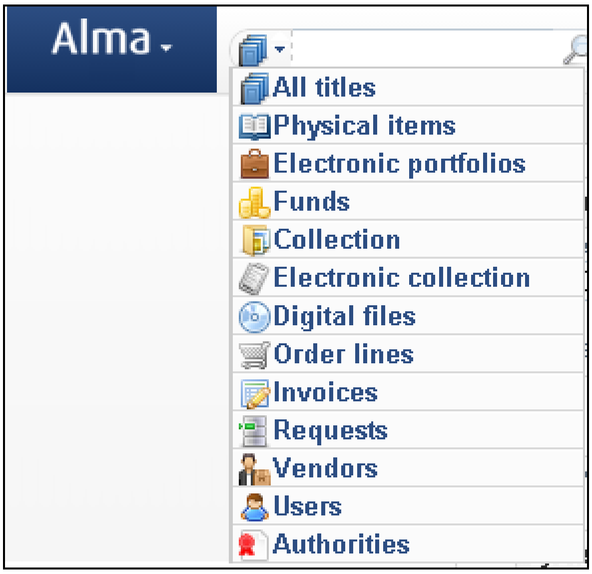


Figure 2: Persistent Search Drop-Down List of Options

2 Enter the search term or value in the **Persistent Search** box and click **Find** .

The following table describes the search page in which the results are displayed, and the user types for which the presearch option itself is displayed.

Table 1. Persistent Search Box – Presearch Criteria

Presearch Criteria	Results Displayed In	Displayed For User Types
All titles	Repository Search page	All
Physical items	Repository Search page	All
Electronic portfolios	Repository Search page	All
Funds	Funds and Ledgers page	Fund Manager, Ledger Manager, Purchasing Manager, Purchasing Operator, Selector
Collection	Repository Search page	All
Electronic collection	Repository Search page	All
Digital files	Repository Search page	All
Order lines	Search for PO Line page (see **Searching for PO Lines** in the *Alma Acquisitions Guide* for a description of the search results)	Invoice Manager, Invoice Operator, Invoice Operator Extended, Purchasing Manager, Purchasing Operator, Selector, Trial Manager, Trial Operator
Invoices	Find Invoices page (see **Searching for Invoices** in the *Alma Acquisitions Guide* for a description of the search results)	Invoice Manager, Invoice Operator, Invoice Operator Extended, Purchasing Manager, Purchasing Operator, Selector
Requests	Resource Request Monitoring page (see **Monitoring Requests and Work Orders** in the *Alma Fulfillment Guide*)	Receiving Operator, Receiving Operator Limited, Circulation Desk Manager, Circulation Desk Operator, Fulfillment Services Manager, Fulfillment Services Operator, Requests Operator, Work Order Operator

Table 1. Persistent Search Box – Presearch Criteria

Presearch Criteria	Results Displayed In	Displayed For User Types
Vendors	Search Vendors page (see **Navigating and Filtering the List of Vendors** in the *Alma Acquisitions Guide*)	Vendor Manager
Users	Find and Manage Users page (see **Managing Users** in the *Alma Administration Guide*)	User Administrator, User Manager, General System Administrator
Authorities	Repository Search page	All

Using the Alma Repository Search

The Alma repository search enables you to search the repository for physical items, electronic portfolios, electronic collections, collections, digital files, or authorities. The repository search offers you the following methods of searching:

- Simple Search – Enables you to search the repository using Find, Where, and Contains filters (see **Using the Simple Search** on page **19**)
- Advanced Search – Enables you to build search criteria and include additional search conditions that allow you to refine your search (see **Using the Advanced Search** on page **20**)

NOTE:
For information regarding search indexes, see **Search Indexes** on page **115**.

VIDEO:
See the *Navigating And Searching In Alma* training WebEx sessions on using the search function within Alma. Note that you must be logged on to the Ex Libris Learning Center to access this session.

You can also save search queries and reuse them at any time (see **Working with Queries** on page **32**).

To access the Alma Repository Search, select **Resource Management > Search and Sets > Repository Search**.

Figure 3: Repository Search Page

Using the Simple Search

The Repository Search page has a Simple Search interface as well as links to the Advanced Search (see **Using the Advanced Search** on page **20**) and Saved Queries (see **Saving Queries** on page **32**). The Simple Search comprises the following elements:

- Find – Enables you to choose from the following types of resources to be searched:
  - All Titles – Returns all bibliographic records in the repository
  - Physical Titles – Returns bibliographic records that have physical holdings in the repository
  - Electronic Titles – Returns bibliographic records for all electronic titles in the repository
  - Digital Titles – Returns bibliographic records for all digital titles in the repository
  - Digital Files – Returns item information for all digital files in the repository
  - Physical Items – Returns item- and holdings-level information for all physical resources in the repository
  - Electronic Portfolio – Returns all electronic portfolios in the repository
  - Collection – Returns all collections in the repository
  - Electronic Collection – Returns all electronic collections in the repository
  - Authorities – Returns authority records
- Where – Enables you to choose the index or field on which to perform the search. The indexes that display vary depending on the resource type that you selected with the Find option.

  Local search indexes that display in the Where drop-down list can be configured in **Resource Management > Resource Configuration > Configuration Menu > Search Configuration > Search Indexes**. Refer to **Configuring Search Indexes** on page **615** for additional information.

NOTE:
The Keywords search index is a general index that contains values from many fields but not from all the fields. For a list of the keyword indexes searched when using the persistent search box, see **Keyword Search Indexes** on page **136**.

- Contains – Use this option to enter your search content.

NOTES:

Regarding search content:

- Articles - You may either include or omit articles (such as the, a, an) in your search content. Materials have been indexed with and without the articles to enable consistent search results.
- Special characters can be entered in the same manner as other characters. (For example, if a title contains the ! special character, you can search for a title containing the keyword !)
- The ? wildcard character is supported for any single character. The * wildcard character is supported for any string following the entry of three non-special characters.
- ISBN - Records in the Alma database have been converted from the ISBN-10 to the ISBN-13 format. This enables consistent search results when you need to match records on content entered for an ISBN search.

After you enter your search elements and click **Go**, the items that match your search query display on the Repository Search page.

On the Repository Search page, you can:

- Click **Save Query** if you want to save the search criteria details (see **Saving Queries** on page **32**).
- Use the results of the search as described in **Using the Repository Search Results List** on page **35**.
- Perform an advanced search by clicking the **Advanced search** link (see **Using the Advanced Search** on page **20**).

Using the Advanced Search

The Advanced Search option supports a more powerful, refined search, including multiple fields and search fields of other resource types. For example, when searching physical titles, you can search for a bibliographic title in a particular holdings location.

This is done by choosing the Advanced Search option and adding conditions to the search input.

To use the Advanced Search:

1 On the Repository Search page, click the **Advanced Search** link. The Advanced Search page opens.

Figure 4: Advanced Search Page

2 Select an option from the **Find** drop-down list and click **Add Conditions**. The Advanced Search – Add Conditions dialog box opens.

NOTE:
The options available in the Advanced Search – Add Conditions dialog box vary based on your selection from the Find drop-down list on the Advanced Search page.

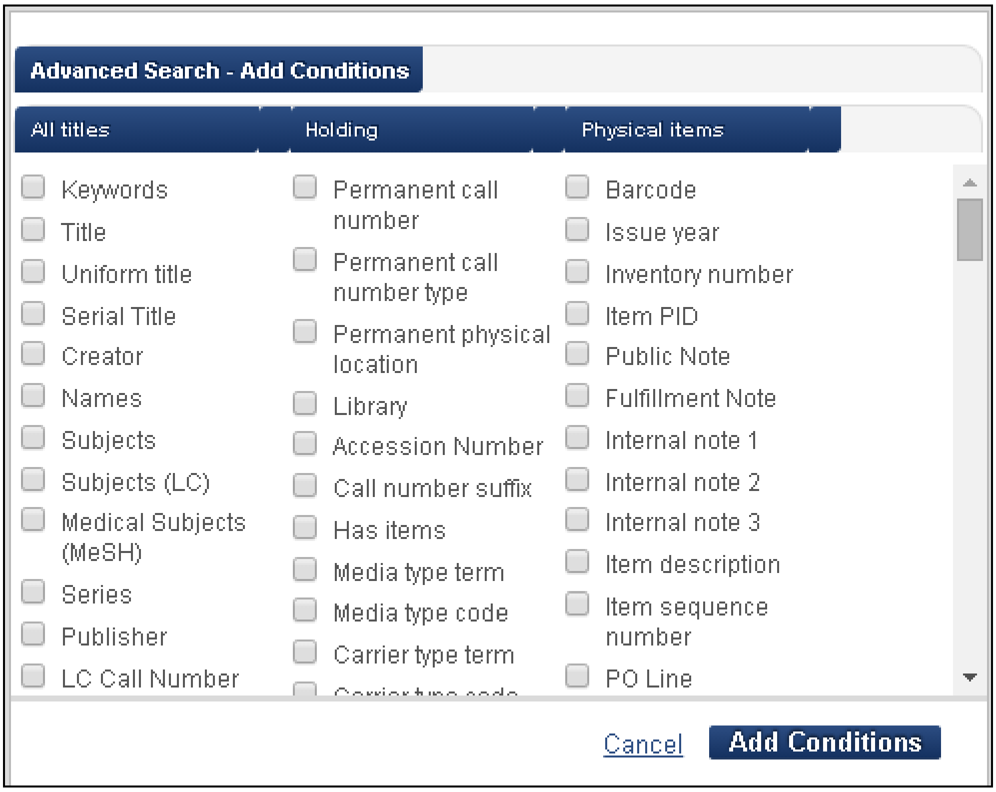


Figure 5: Advanced Search – Add Conditions Dialog Box (when Physical Titles is Selected from the Find Option)

Most of the options presented in the Advanced Search – Add Conditions dialog box are self-explanatory. Refer to the following table for additional information regarding the Advanced Search – Add Conditions options.

Table 2. Additional Information for Advanced Search – Add Conditions Options

Option	Description
Originating system ID	The record ID created in the system from which the item was imported.
Originating system	The name of the system from which the item was imported into Alma.
Tag sync external catalog	Indicates whether the MMS record must be synchronized with an external catalog such as OCLC WorldCat.
Item PID	The internal-, system-generated ID for the item.
Provenance code	A code, defined by the institution indicating the origin of the material.

Table 2. Additional Information for Advanced Search – Add Conditions Options

Option	Description
Current location	Selecting this index retrieves only items currently in the searched location.
Temporary library	The actual physical location of the item.
Temporary physical location	Selecting this index retrieves all items identified in the system's temporary location field regardless of whether the item is currently in the temporary location (that is, even when `Item is in temporary location=No`).
Other Classification Number	A classification number from a scheme not covered by one of the other number fields.

In addition to these fields (or conditions) based on the type of search, Alma supports RDA fields and subfields for systems that use RDA. An example of the fields are shown in the image below.

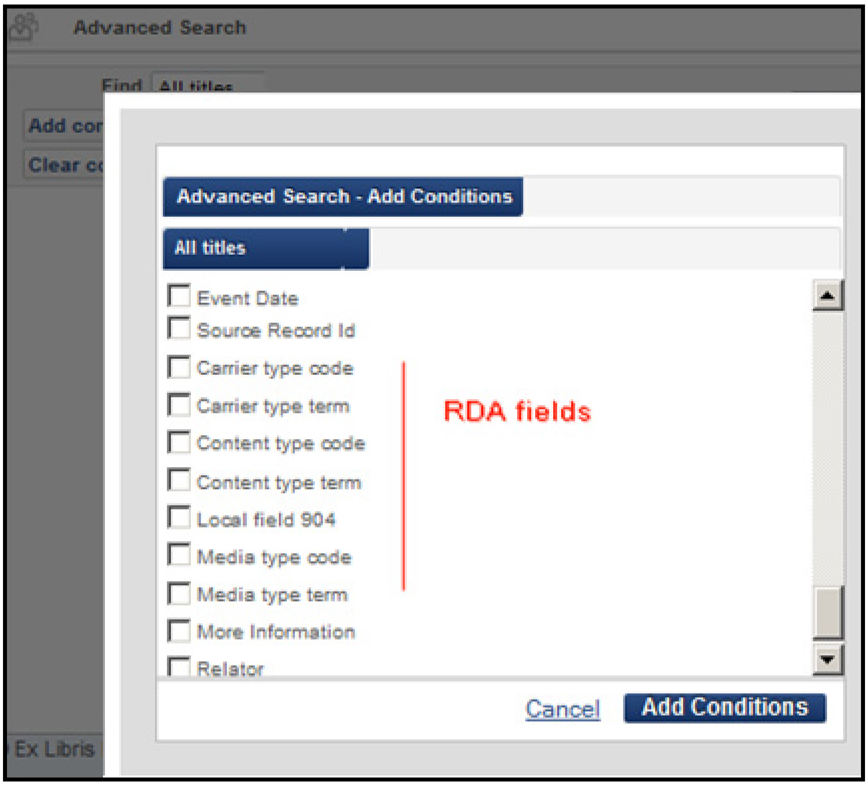


Figure 6: Add Conditions with RDA Fields

The following RDA fields are supported by Alma.

NOTE:
Bibliographic, authority, and holdings types appear under subheadings in the table below. Repeatable fields are marked by "(R)" in the description. Non-repeatable fields are marked by "(NR)."

Table 3. RDA Fields Supported in Alma

Field	Description
Bibliographic	
028	Publisher Number (R)
264	Production, Publication, Distribution, Manufacture, and Copyright Notice (R)
336	Content Type (R)
337	Media Type (R)
338	Carrier Type (R)
340	Physical Medium (R)
344	Sound Characteristics (R)
345	Projection Characteristics of Moving Image (R)
346	Video Characteristics (R)
347	Digital File Characteristics (R)
377	Associated Language (R)
380	Form of Work (R)
381	Other Distinguishing Characteristics of Work or Expression (R)
382	Medium of Performance (R)
383	Numeric Designation of Musical Work (R)
384	Key (NR)
Authority	
046	Special Coded Dates (R)
336	Content type (R)
368	Other Attributes of Person or Corporate Body (R)
370	Associated Place (R)
371	Address (R)

Table 3. RDA Fields Supported in Alma

Field	Description
372	Field of Activity (R)
373	Associated Group (R)
374	Occupation (R)
375	Gender (R)
376	Family Information (R)
378	Fuller Form of Personal Name (NR)
377	Associated Language (R)
380	Form of Work (R)
381	Other Distinguishing Characteristics of Work or Expression (R)
382	Medium of Performance (R)
383	Numeric Designation of Musical Work (R)
384	Key (NR)
Holdings	
337	Media Type (R)
338	Carrier Type (R)

3 Build the Advanced Search conditions to match your search requirements.

a From the Advanced Search dialog box, select one or more conditions for your search and click **Add Conditions**. The Advanced Search page refreshes and opens showing the selected search fields.

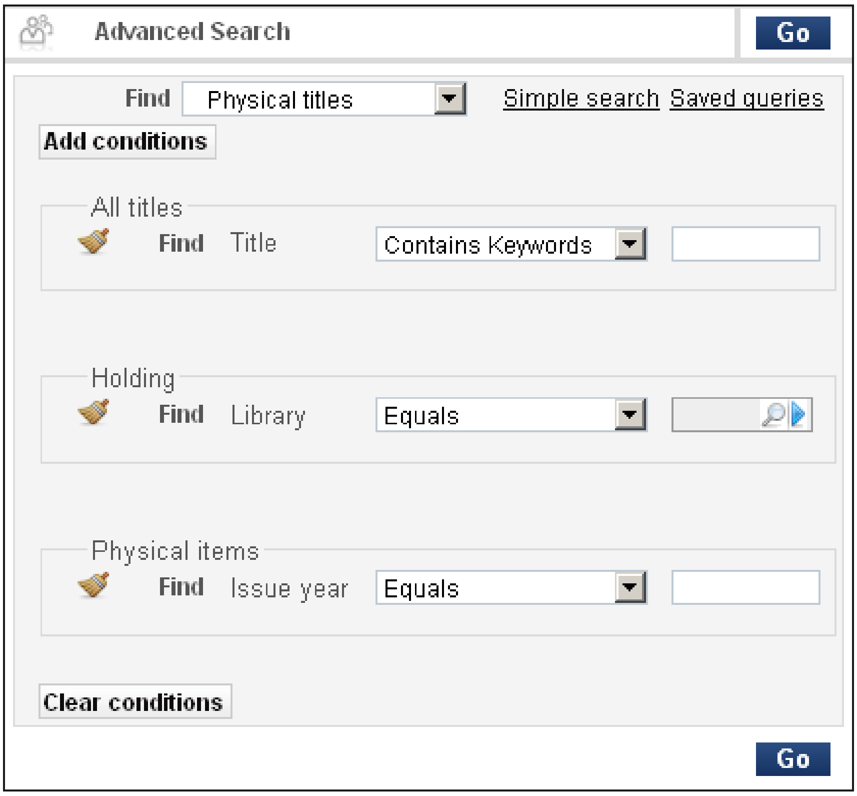


Figure 7: Advanced Search Page with Search Fields

b Select the condition logic for your search:

- Contains Keywords
- Contains Phrase
- Starts With
- Equals
- Not Equals
- >
- <
- >=
- <=
- In
- Not In

- Before
- After
- Is Empty – For example, you can use this condition to find all physical items that do not have barcodes.

The condition logic options vary depending on the Add Condition selected. See **Table 4** for a sample list.

c Enter your Add Condition content criteria (free-form text or a value selected from a search or drop-down list).

NOTES:

- Special characters can be entered in the same manner as other characters. (For example, if a title contains the ! special character, you can search for a title containing the keyword !)
- The ? wildcard character is supported for any single character. The * wildcard character is supported for any string following the entry of three non-special characters.

---

d Optionally:

- Repeat step 3a through step 3c to further narrow your search
- Remove a specific condition, as needed, using the remove condition icon (the broom)
- Use Clear Conditions to remove all the conditions

4 Click **Go**. The items that match your search criteria display on the Repository Search page.

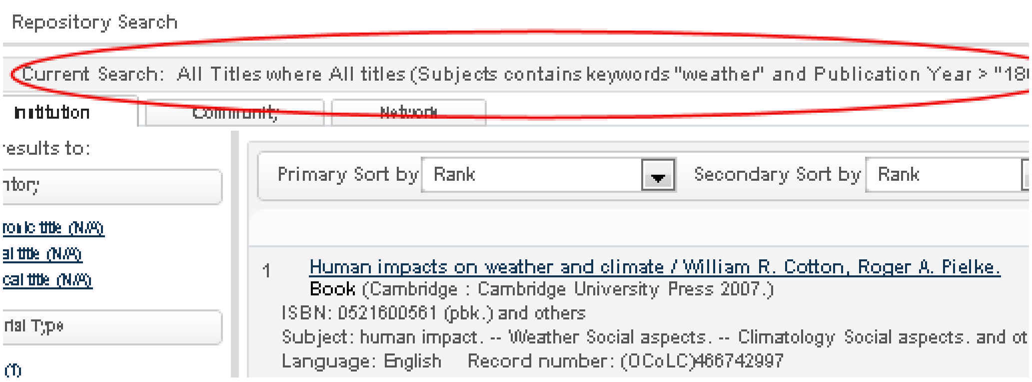


Figure 8: Repository Search Page – with Results

NOTE:
The search criteria used are listed in the **Current Search** line at the top of the page.

5 On the Repository Search page, you can:

- Click **Save Query** if you want to save the search criteria details (see **Saving Queries** on page **32**).
- Use the results of the search as described in **Using the Repository Search Results List** on page **35**
- Change the search criteria by clicking the **Change Query** link and redefining your search criteria (**Figure 7**).
- Go back to a simple search by clicking the **Simple Search** link (see **Using the Simple Search** on page **19**).
- Choose from the list of saved queries by clicking the **Saved Queries** link (see **Using Saved Queries** on page **34**).

Finding Holdings Without Items Using Advanced Search

Using the **Has items** advanced search condition, you can locate holdings without items.

To find holdings without items using the Has items condition:

1. From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
2. Click **Advanced search**.
3. Confirm that your Find option is set to Physical Titles and click **Add Conditions**.
4. Select the **Has items** condition, and click **Add Conditions**.

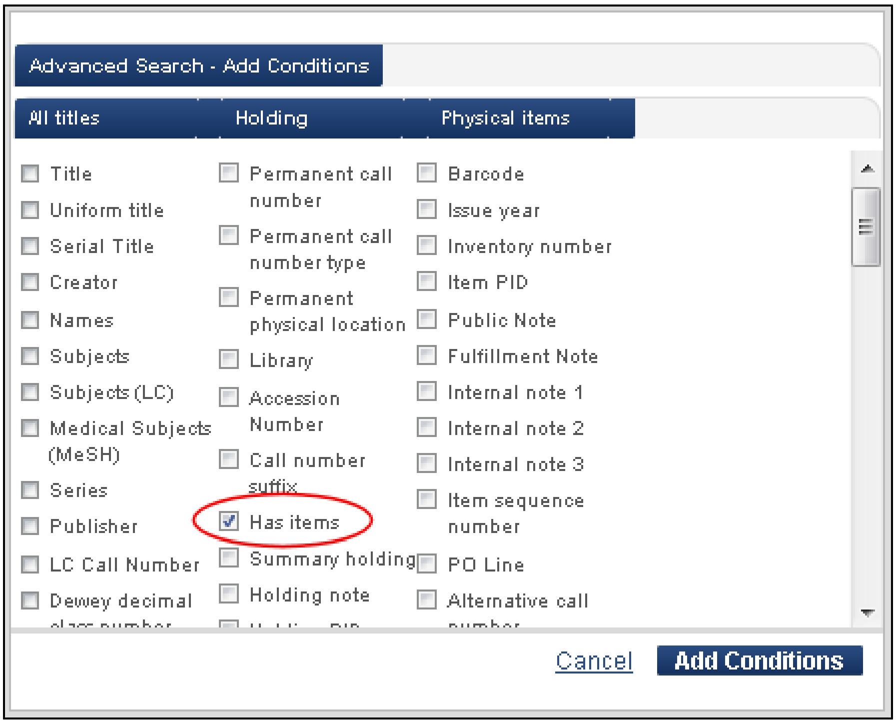


Figure 9: Has Items Advanced Search Condition (Physical Titles/Holdings Column)

5 Specify **No** for the Has items (equals) condition.

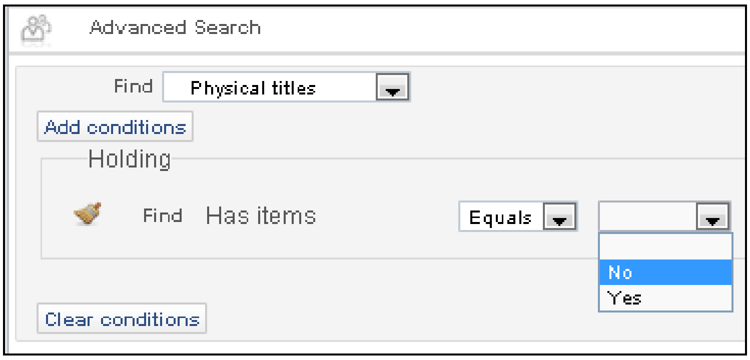


Figure 10: Has Items Yes/No Option (Holdings)

6 Click **Go**.

The search results display.

Finding Physical Titles/Items Without Barcodes Using Advanced Search

Alma provides the capability to conduct an advanced search of physical titles/ items without barcodes or other information. This is possible with the Is Empty advanced search option (see the table below for a sample list of conditions with the Is Empty option). From your search results, you can create sets to analyze and manage/update your Alma database.

Table 4. Is Empty Sample List

All Titles (No Present)	Holdings (Not Present)	Physical Items (Not Present)
LC call number	Permanent call number type	Inventory number
Dewey decimal class number	Permanent physical location	Public note
UDC	Library	Fulfillment note
Other classification number	Call number suffix	Internal note 1
Additional publication year	Summary holdings	Internal note 2
Language	Holdings note	Internal note 3
LC control number		Item sequence number
ISBN		PO line
ISSN		Alternative call number
ISSN link		Alternative call number type
Other standard ID		Creation date
Government document number		Current library
National bibliography number		Currently location
Publisher number		Due back from temp location date
Standard number		Expected receiving date
Other system number		Inventory date
Notes		Is Magnetic
Local notes		Item policy

Table 4. Is Empty Sample List

All Titles (No Present)	Holdings (Not Present)	Physical Items (Not Present)
Description		Last shelf report date
MMS SIP ID		Material type
Physical description		Modification date
Country of publication		On shelf date
Genre form		On shelf seq
Publisher location		Pages
Material type		Pieces
Medium type		Process type
Originating system ID		
Originating system		
Tag suppressed		
Tag sync external catalog		
Tag brief		
Local field 900		
Relator		

To find physical titles without barcodes:

1. From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
2. Click **Advanced search**.
3. Confirm that your Find option is set to **Physical Titles** and click **Add Conditions**.
4. From the Physical Items column, select **Barcode** and click **Add Conditions**.

   The barcode additional condition displays with the Is Empty option available from the drop-down list.

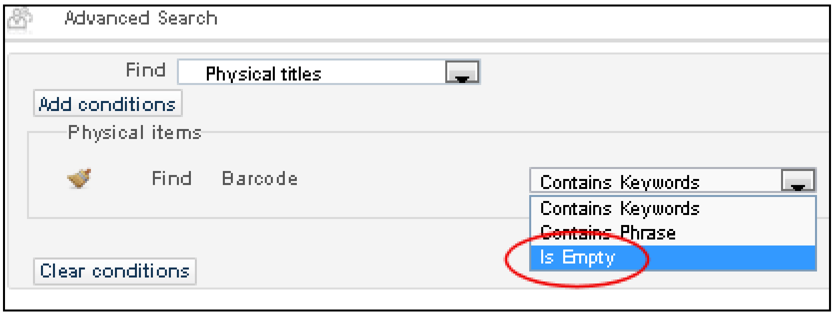


Figure 11: Is Empty Advanced Search Condition

5 Click **Go**.

The search results display all the physical items without barcodes.

Working with Queries

You can save queries that you have created for later use. Refer to:

- **Saving Queries** on page **32**
- **Using Saved Queries** on page **34**

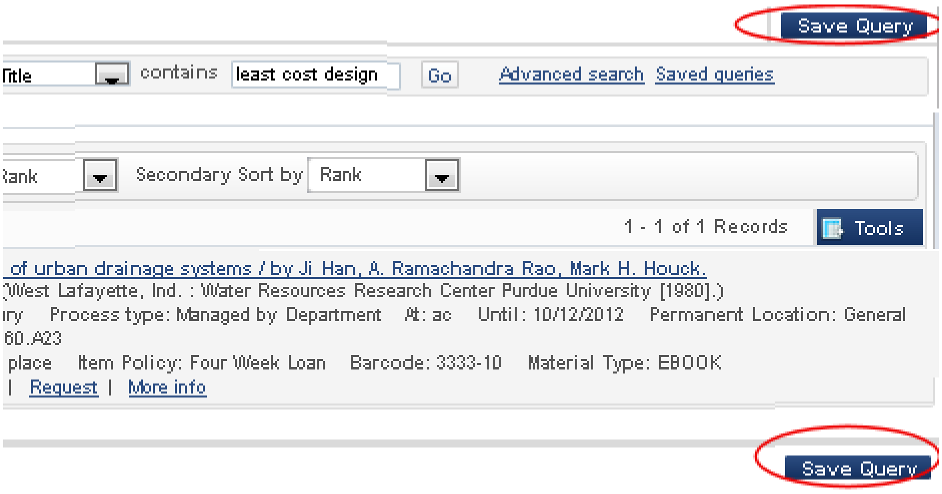
Saving Queries

Saving queries enables you to save sets of search criteria that can be reused.

You can save any search query whether it was created using the Persistent Search box (see **Using the Persistent Search Box** on page **16**), the Simple Search (see **Using the Simple Search** on page **19**) or the Advanced Search (see **Using the Advanced Search** on page **20**).

To save a query:

1 Click **Save Query** that displays on the Repository Search page after each search.



The Set Details page opens.

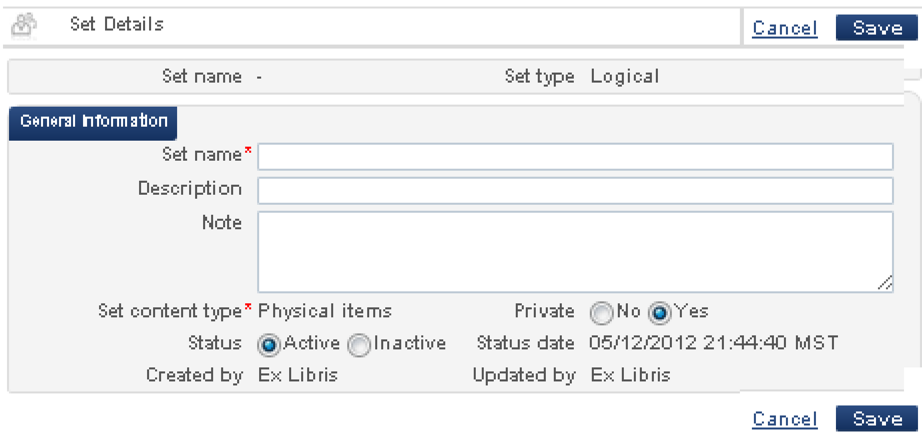


Figure 12: Set Details Page

2 Enter the set details in the respective fields. (The **Set Name** is a mandatory field and must be unique. Other fields are optional).

By default, the set is designated as **Private** (**Yes**), only available to you from the My Sets tab on the Manage Sets page (**Figure 13**). If you select **No**, the set becomes a public set and is available to all other users from the Public Sets tab on the Manage Sets page (**Figure 13**).

By default, the **Status** is set to **Active**. Optionally, select **Inactive**.

3 Click **Save**. The Manage Sets page opens displaying the newly saved set on the list of saved sets. For more information on Managing Sets see **Managing Search Queries and Sets** on page **81**.

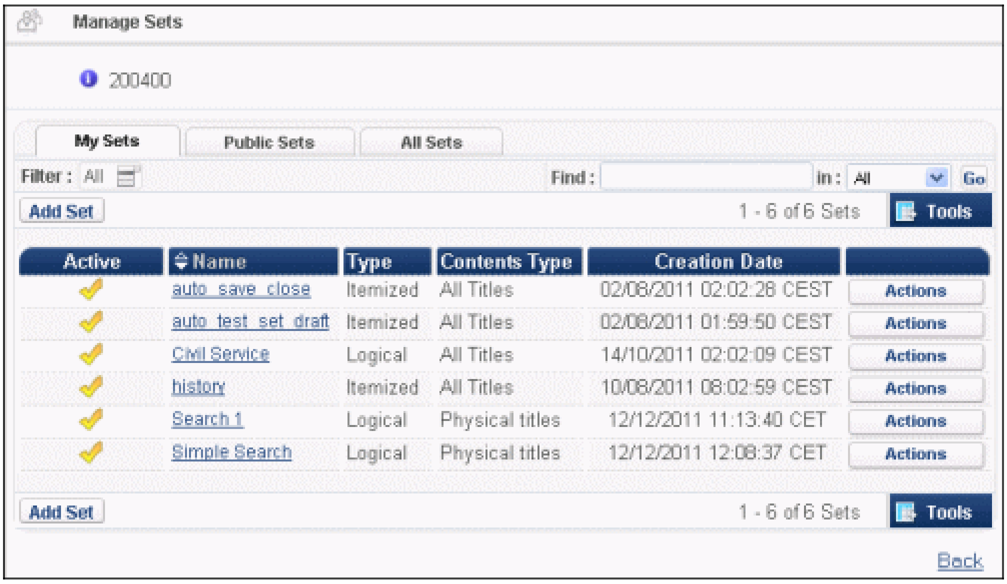


Figure 13: Manage Sets Page

Using Saved Queries

Saved queries can be accessed using the **Saved Queries** link on the Repository Search page or from the **Manage Sets** menu link.

For information on how to use a saved query from the Manage Sets page see **Managing Search Queries and Sets** on page **81**

To access and use saved queries from the Repository Search page:

1. On the Repository Search page, click the **Saved Queries** link. The Select Set page opens.

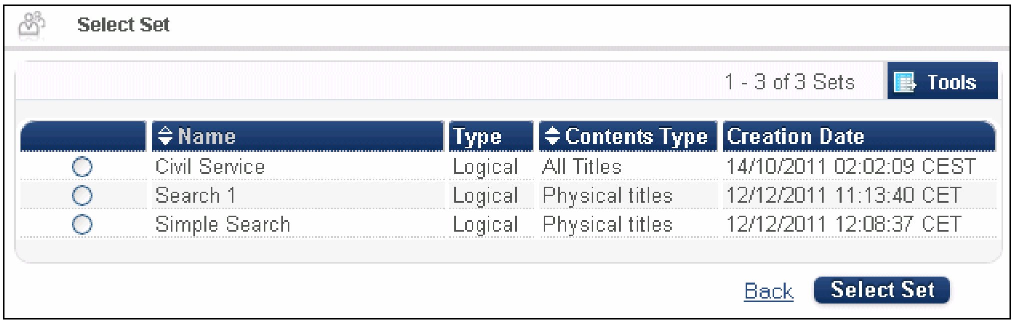


Figure 14: Select Set Page

2. Select the set you want to use and click **Select Set**. The search is performed according to the settings in the saved query, and the Repository Search page opens showing the results of the search.

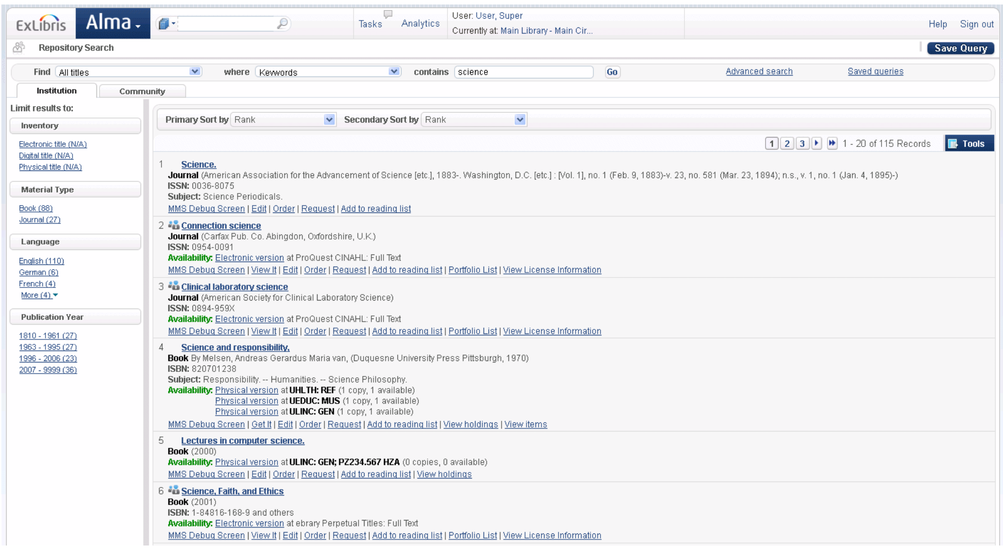


Figure 15: Repository Search Page with Results

See **Using the Repository Search Results List** on page 35 for details regarding how to use the search results.

Using the Repository Search Results List

The Repository Search results list provides a numbered list of matching results displayed according to the type of resource chosen for your search. By default, search results are displayed according to an internal ranking mechanism that is based on Apache Solr. The basic scoring/ranking model explanation is located at `http://www.solrtutorial.com/solr-search-relevancy.html`. Documents are scored/ranked in the following manner:

- **Term Frequency** - The frequency with which a term appears in a document. Given a search query, the higher the term frequency, the higher the document score.
- **Inverse Document Frequency** - The rarer a term is across all documents in the index, the higher its contribution to the score.
- **Coordination Factor** - The more query terms found in a document, the higher its score.
- **Field Length** - The more words a field contains, the lower its score. This factor penalizes documents with longer field values.

In addition, primary and secondary sorts may be selected from the drop-down lists at the top of the search results. Both drop-down lists offer the following options (where Asc=ascending and Desc=descending):

- Rank
- Title – Asc
- Title – Desc
- Creator – Asc
- Creator – Desc
- Publication Date – Asc
- Publication Date – Desc

VIDEO:

For information about terminology used on the Repository Search Results list, see the *"Managed by Department" Changed to "In Process"* video (2:58 mins).

Facets

Search results may be filtered using the facets displayed in the left pane of the search results. The number of facets are determined by the type of material searched and the search results. Refer to the table below for a list of facets provided.

Table 5. Search Result Facets

Search Type	Facets Provided
All titles	Inventory
	Material type
	Language
	Publication year
Physical titles	Material type
	Language
	Publication year
Electronic titles	Material type
	Language
Digital titles	Language
	Publication year
	Entity type
	Preservation type
Digital files	Entity type
	File MIME type
	File size bytes
	File extension
Physical items	Item material type
	Library
	Process type
Electronic portfolio	Type
	Interface
	Electronic collection type
	Service
	Electronic material type
	Availability
Collection	Library
Electronic collection	Type

Table 5. Search Result Facets

Search Type	Facets Provided
	Interface
	Electronic collection type
	Availability
Authorities	Heading Usage
	Vocabulary

The facets display a count in parentheses next to the facet label.

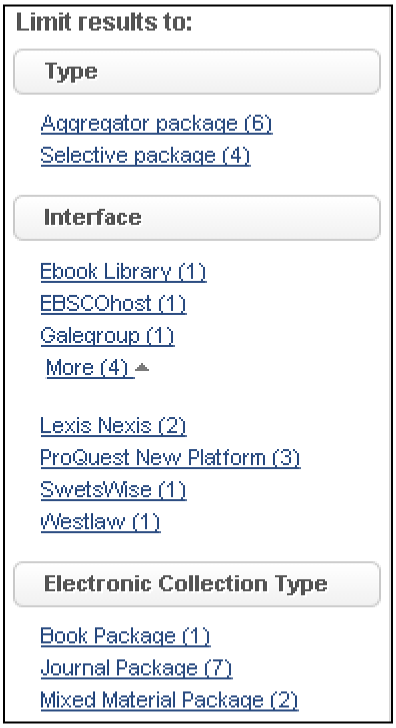


Figure 16: Facet Count in Parentheses

The facet numbers in parentheses are directly related to the total count provided with your search results. In the illustration below, the total count is 10. In the previous illustration (from the same search results), the facet counts add up to 10 for each facet type.

Figure 17: Total Count in Search Results

Sometimes the total count is labeled **approximately**. This may happen when the number of results is large. In order to provide reasonable response time with search results, Alma is designed to provide an approximate count when the results are large.

Figure 18: Approximate Total Count

NOTE:

Since the facet count is related to the total count, when the total count is labeled **approximately**, the facet counts are also approximate.

To select a facet, click the link for the facet you prefer to narrow the search results. You may select more than one facet when multiple facets are available (see illustration below). You can also deselect facets that you previously selected by closing the facet (clicking the "X") in the **Search limited to** row.

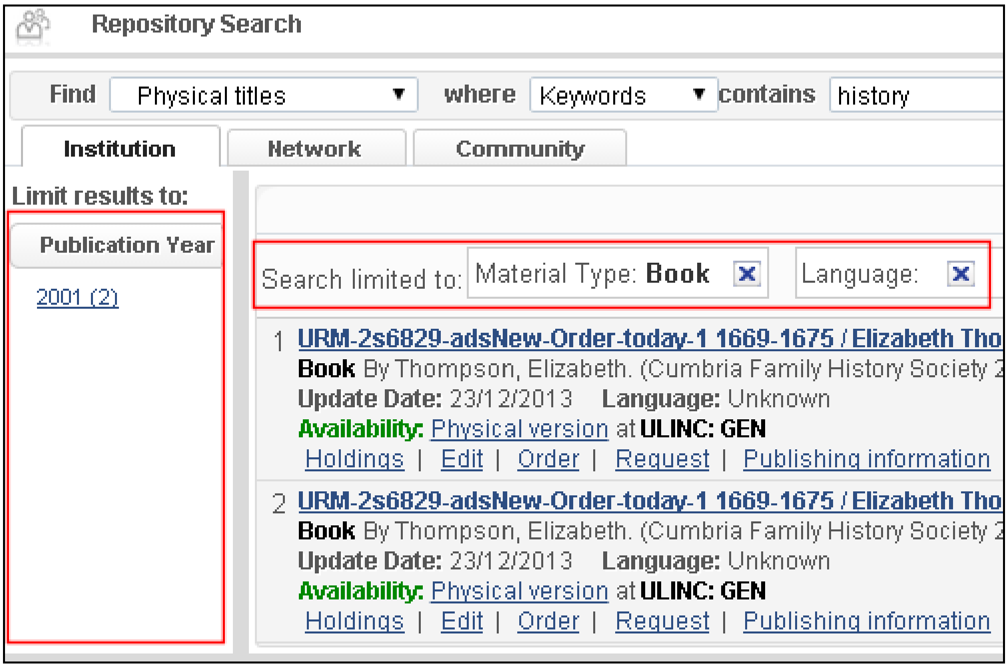


Figure 19: Multiple Facets

Institution, Community, and Network Tabs

If you conduct your search in the **Institution** tab, which includes your institution's locally held resources, records that are linked to the Community Zone have an icon next to them. If you click this icon, results of the search query display in the **Community** tab.

Similarly, if you conduct your search in the **Community** tab, which includes records in the Community Zone, records for which local inventory also exists have an icon next to them. If you click this icon, results of the search query display in the **Institution** tab.

Where Alma is implemented for collaborative network environments, the Repository Search page displays a **Network** tab that provides access to the data stored in the Network Zone (NZ). For more information regarding the **Network** tab, refer to **Working with the Repository Search and MD Editor in a Collaborative Network** on page **4** in the *Alma Collaborative Networks (Consortia) Guide*.)

Repository Search Results Actions

Refer to the table below for a description of the actions that you can take while using the Repository Search results.

NOTE:
The links that display depend upon the roles of the user. Not all links display for all users.

The details of your search results can be saved for future use by clicking **Save Query**. Refer to **Working with Queries** on page **32** and **Managing Search Queries and Sets** on page **81** for more information.

Table 6. Search Results List Actions

Search Type	Action	Description
All Titles (Institution tab)	Add to Reading List	Add the item to an existing course reading list (refer to **Managing Reading Lists** in the *Alma Fulfillment Guide*).
	View Digital Resource	Opens the Digital IE Resource Editor on the General Information tab in view mode.
	Edit Digital Resource	Opens the Digital IE Resource Editor on the General Information tab in edit mode.

Table 6. Search Results List Actions

Search Type	Action	Description
	Other actions	Since the results for an All Titles search include physical, electronic, and digital titles, the links beneath each record vary according to the record type. Refer to the following titles-related sections of this table for the descriptions of the remaining All Titles search results actions: ■ **Physical Titles** ■ **Electronic Titles (Institution tab)** ■ **Digital Titles**
All Titles (Community tab)	Order	Opens the PO Line Owner and Type page to initiate a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*).
	Portfolio List	Opens the Portfolios List page. For more information refer to **Using the Portfolios List** on page **73**.
Physical Titles	Holdings	Opens the MARC Record Simple View (single record) or the List of Holdings page (multiple records). For more information, refer to **Using the List of Holdings** on page **76**.
	Items	Opens one of the following pages: ■ Physical Item Editor (single item) For more information, refer to **Updating Item-Level Information** on page **465**. ■ List of Items (multiple items) For more information, refer to **Using the List of Items** on page **77**.

Table 6. Search Results List Actions

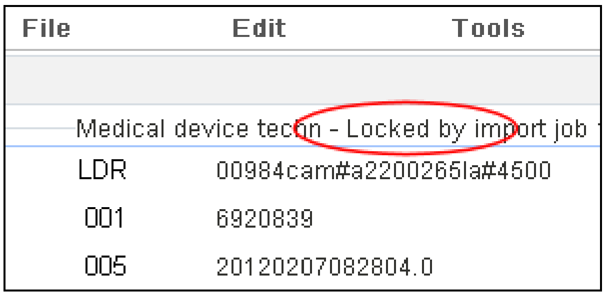
Search Type	Action	Description
Physical Titles (continued)	Edit	Opens the MD Editor (refer to **Opening the Metadata Editor** on page **147**) enabling you to modify the bibliographic record. **NOTE:** Search results for a locked record display the **Edit** action and the locked notation for the record is displayed in the MD Editor view of the record (see example below). This notation indicates that there is an open draft for the record and that someone other than you is working on it. As a result, this record cannot be edited until the operator that has it locked does a **Release** or **Save and Release** in the MD Editor or the setting for the `working_copy_lock_timeout` parameter has expired. The default setting for `working_copy_lock_timeout` is one hour. Refer to **Configuring Other Settings** on page **695** and **Table 84** for configuration information.  Figure 20: Locked by Notation
	Order	Opens the PO Line Owner and Type page to initiate a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*).
	Request	Displays the Create Request page (refer to **Creating a Request** in the *Alma Fulfillment Guide*). From the Create Request page, you can select a **Physical titles** request such as **Move temporarily** or **Patron digitization request** from the Request Type drop-down list.

Table 6. Search Results List Actions

<table>
<tr><th>Search Type</th><th>Action</th><th>Description</th></tr>
<tr><td></td><td>Release Assignment</td><td>Allows staff users with the Catalog Manager role to release the bibliographic record if it is assigned to another staff user. If you want to remove all bibliographic record assignments for a particular staff user, refer to MD Editor Menu and Toolbar Options on page 155.</td></tr>
<tr><td></td><td>Publishing Information</td><td>Opens the Publishing Information page that provides the following information:
PID
Last publication date
Last publication value
RTA link
Job history (if available)
VIDEO:
Learn about debugging publishing information in the Debugging Publishing Information video (1:52 mins).</td></tr>
<tr><td></td><td>More Info</td><td>Opens the More Info dialog box that displays the following information:
Title
Related Records - number of related records (or No Related Records)
Orders - number of orders (or No Orders)
Requests/Work Orders - number of requests/work orders (or No Requests/Work Orders). This value does not include expired booking requests, and indicates only the number of requests/work orders linked to the title; it does not indicate anything about the request's place in the queue.
Courses - number of linked courses (No Course)
Click the links that are displayed in this dialog box to access additional details.
VIDEO:
For information on displaying the courses associated with a title, see the View Courses Linked to a Title video (2:43 mins).</td></tr>
</table>

Table 6. Search Results List Actions

Search Type	Action	Description
Electronic Titles (Institution tab)	Electronic Collection List	Displays the portfolio list associated with the title (bibliographic record). For more information regarding the actions displayed in the portfolio list, refer to **Using the Portfolios List** on page **73**.
	View It	Opens the Alma Resolver Electronic Services page. For more information regarding the Alma Resolver Electronic Services page, refer to **Using the Alma Resolver Electronic Services Page** on page **418**. To enable direct linking to electronic services via Alma Resolver Electronic Services, refer to **Configuring Direct Linking** in the *Alma Fulfillment Guide*.
	Order	Initiates a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*). When you place orders for electronic resources (from bibliographic-/title-level search results) that contain multiple URLs (856 $u fields), Alma creates a portfolio for each URL (see the example below for *Commentaries on the Constitution of the United States*).
	Document Delivery	Displays the Create Request page (refer to **Creating a Request** in the *Alma Fulfillment Guide*).
	Publishing Information	Opens the Publishing Information page that provides the following information: ■ PID ■ Last publication date ■ Last publication value ■ RTA link ■ Job history (if available) **VIDEO:** Learn about debugging publishing information in the *Debugging Publishing Information* video (1:52 mins).

Table 6. Search Results List Actions

Search Type	Action	Description
	More Info	Opens the More Info dialog box that displays the following information: ■ Title ■ Related Records - number of related records (or No Related Records) ■ Orders - number of orders (or No Orders) ■ Requests/Work Orders - number of requests/work orders (or No Requests/Work Orders). This value does not include expired booking requests, and indicates only the number of requests/work orders linked to the title; it does not indicate anything about the request's place in the queue. ■ Licenses - number of licenses (or No Licenses) Refer to **Associating a License at the Portfolio Level** on page **384** and **Managing Licenses and Amendments** in the *Alma Acquisitions Guide* for related information. ■ Courses - number of linked courses (No Course) Click the links that are displayed in this dialog box to access additional details. **VIDEO:** For information on displaying the courses associated with a title, see the *View Courses Linked to a Title* video (2:43 mins).
Electronic Titles (Community tab)	Electronic Collection List	Opens the Portfolios List page. For more information refer to **Using the Portfolios List** on page **73**.
	Order	Opens the PO Line Owner and Type page to initiate a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*).
Digital Titles	View It	Opens the Alma Resolver Electronic Services page from which you can view the digital object (if you have permission/access to the object). For more information regarding the Alma Resolver Electronic Services page, refer to **Using the Alma Resolver Electronic Services Page** on page **418**.
	View	Opens the Digital IE Resource Editor on the General Information tab in view mode.

Table 6. Search Results List Actions

Search Type	Action	Description
Digital Titles (continued)	Edit	Opens the Digital IE Resource Editor on the General Information tab in edit mode.
	Export	Exports the selected digital title. A note displays at the top of the Repository Search page (above the Search Criteria options) providing the location of the exported digital title.
	Order	Initiates a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*)
	Publishing Information	Opens the Publishing Information page that provides the following information: ■ PID ■ Last publication date ■ Last publication value ■ RTA link ■ Job history (if available) **VIDEO:** Learn about debugging publishing information in the *Debugging Publishing Information* video (1:52 mins).

Table 6. Search Results List Actions

Search Type	Action	Description
Digital Titles (continued)	More Info	Opens the More Info dialog box that displays the following information: ■ Title ■ Related Records - number of related records (or No Related Records) ■ Orders - number of orders (or No Orders) ■ Requests/Work Orders - number of requests/work orders (or No Requests/Work Orders). This value does not include expired booking requests, and indicates only the number of requests/work orders linked to the title; it does not indicate anything about the request's place in the queue. For more information on the request queue/priority, refer to **Request Priority** in the *Alma Fulfillment Guide*. ■ Courses - number of linked courses (No Course) Click the links that are displayed in this dialog box to access additional details. **VIDEO:** For information on displaying the courses associated with a title, see the *View Courses Linked to a Title* video (2:43 mins).
Digital Files	View It	Opens the Alma Resolver Electronic Services page from which you can view the digital object (if you have permission/access to the object). For more information regarding the Alma Resolver Electronic Services page, refer to **Using the Alma Resolver Electronic Services Page** on page 418.
	View	Opens the Digital File Resource Editor page in view mode.
	Edit	Opens the Digital File Resource Editor page in edit mode.
Physical Items	Edit	Displays the Physical Item Editor page for modifying the record (refer to **Updating Item-Level Information** on page 465).
	Holdings	Opens the List of Holdings page. For more information, refer to **Using the List of Holdings** on page 76.

Table 6. Search Results List Actions

Search Type	Action	Description
Physical Items (continued)	Items	Opens one of the following pages: ■ Physical Item Editor (single item) For more information, refer to **Updating Item-Level Information** on page **465**. ■ List of Items (multiple items) For more information, refer to **Using the List of Items** on page **77**.
	Request	Initiates a fulfillment request (refer to **Creating a Request** in the *Alma Fulfillment Guide*).
	Work Order	Opens the Create Request page for entering a work order, such as to request binding or process a withdrawal.

Table 6. Search Results List Actions

<table>
<tr><th>Search Type</th><th>Action</th><th>Description</th></tr>
<tr><td>Physical Items (continued)</td><td>More Info</td><td>Opens the More Info dialog box that displays the following information:

Title
Related Records - number of related records (or No Related Records)
Orders - number of orders (or No Orders)
Requests/Work Orders - number of requests/work orders (or No Requests/Work Orders). This value does not include expired booking requests, and indicates only the number of requests/work orders linked to the item; it does not indicate anything about the request’s place in the queue.

When clicking this value, both requests bound to the item as well as requests that the item can fulfill are displayed.
Number of Loans
Last Loan Date
Number of In-House Uses
Last In-House Use Date
Courses - number of linked courses (No Course)

Click the links that are displayed in this dialog box to access additional details.

VIDEO:
For information on displaying the courses associated with a title, see the View Courses Linked to a Title video (2:43 mins).</td></tr>
<tr><td>Electronic Portfolio (Institution tab)</td><td>Edit</td><td>Opens the Electronic Portfolio Editor page for editing the portfolio record. For more information, refer to Modifying a Portfolio Using the Electronic Portfolio Editor on page 349.</td></tr>
<tr><td></td><td>View</td><td>Opens the Electronic Portfolio Editor page in view mode to view the portfolio record.</td></tr>
<tr><td></td><td>Activate / Deactivate</td><td>Activates or deactivates an electronic portfolio. The resource’s icon changes when the activation status changes. For example, when a portfolio is activated, the icon appears in color (). When the portfolio is deactivated, the icon appears gray ().</td></tr>
</table>

Table 6. Search Results List Actions

Search Type	Action	Description
	Order	Initiates a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*).
	Link to Community	Initiates the process to link a local portfolio to a Community Zone (CZ) portfolio. This option is available only if a local portfolio was created as a standalone portfolio and not as part of an electronic collection. You may, for example, use this option when you have created a local portfolio during the acquisition process and later want to link the portfolio to an electronic collection in the CZ. When you click **Link to Community**, the Link Standalone Portfolio to Community Zone Collection wizard opens, in which you 1) select a matching CZ portfolio, 2) select a local electronic collection with which to associate the standalone portfolio, and 3) select to use the descriptive metadata from the CZ bibliographic record or retain the IZ descriptive metadata. **NOTE:** If you choose to retain the IZ descriptive metadata, the portfolio's descriptive metadata will not be synchronized with updates from the CZ. After the local portfolio is linked to a CZ portfolio, the **Link to Community** search results action no longer appears and the icon changes from the IZ icon to the CZ icon (see below). For related information, refer to **Linking a Local Electronic Collection to the Community Zone** on page 320 and **Linking a Local Portfolio to the CZ When the Portfolio is Part of a CZ-Linked Service/Electronic Collection** on page 377.
	Create E-Activation Task	Creates an electronic activation task and displays a confirmation message when successful.
	Test Access	Tests the access to an electronic portfolio and displays the results on the Alma Resolver Electronic Services page. For more information regarding the Alma Resolver Electronic Services page, refer to **Using the Alma Resolver Electronic Services Page** on page 418.
	Delete	Deletes a local portfolio.

Table 6. Search Results List Actions

Search Type	Action	Description
	Send to Ex Libris	Opens the Send to Ex Libris page, enabling you to send a portfolio update request to Ex Libris. The contact information provided on the Send to Ex Libris page is defined by a General System Administrator in **Administration > General Configuration > Configuration Menu > CRM Contacts**. **VIDEO:** For information on using this option in the Institution tab, see the *"Send to Ex Libris" for Local Collections* video (3:03 mins).
	More Info	Opens the More Info dialog box that displays the following information: ■ Title ■ Related Records - number of related records (or No Related Records) ■ Orders - number of orders (or No Orders) ■ Licenses - number of licenses Refer to **Associating a License at the Portfolio Level** on page **384** and **Managing Licenses and Amendments** in the *Alma Acquisitions Guide* for related information. ■ Courses - number of linked courses (No Course) ■ Usage (last 12 months) - amount of usage for this portfolio across all collections (not displayed if the data is not collected in UStat) Click the links that are displayed in this dialog box to access additional details. **VIDEO:** For information on displaying the courses associated with a title, see the *View Courses Linked to a Title* video (2:43 mins).
Electronic Portfolio (Community tab)	Activate	Initiates the process to add and activate portfolios from the CZ for a library.

Table 6. Search Results List Actions

Search Type	Action	Description
	Order	Opens the PO Line Owner and Type page to initiate a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*).
	Send to Ex Libris	Opens the Send to Ex Libris page, enabling you to send a portfolio update request to Ex Libris. The contact information provided on the Send to Ex Libris page is defined by a General System Administrator in **Administration > General Configuration > Configuration Menu > CRM Contacts**.
Collection	Edit	Opens the MD Editor for editing the collection.
	Edit Collection Resource	Opens the Collections Resource Editor page where you can view summary information for the collection, look up reports and services related to this collection, view titles in the collection, and add subcollections to the collection.
	View Collection Resource	View all related services and components of the collection without the ability to change or add data.
Electronic Collection (Institution tab)	Edit	Opens the Electronic Collection Editor, enabling you to edit the collection record.
	Delete	Displays a Delete Confirmation dialog box for deleting an electronic collection (along with deleting associated electronic collection services, portfolios, and e-activation tasks, and unlinking PO lines) and provides a drop-down list of options (delete, suppress, or do nothing) for handling childless bibliographic records when deleting the electronic collection.
	View	Opens the Electronic Collection Editor page in view mode to view the collection record.
	Portfolio List (number)	Opens the Portfolios List page. The (number) represents the number of portfolios to be displayed on the Portfolios List page. For more information, refer to **Using the Portfolios List** on page 73.
	Order	Opens the PO Line Owner and Type page to initiate a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide).*

Table 6. Search Results List Actions

Search Type	Action	Description
Electronic Collection (Institution tab) (continued)	Link to Community	Initiates the process to link a local electronic collection to an electronic collection in the Community Zone (CZ). Linking local electronic collections to the CZ provides the benefit of CZ updates to the electronic collections that you link to the CZ. Refer to **Linking a Local Electronic Collection to the Community Zone** on page **320** for more information.
	Create E-Activation Task	Creates an electronic activation task and displays a confirmation message when successful.
	Publishing Information	Opens the Publishing Information page that provides the following information: ■ PID ■ Last publication date ■ Last publication value ■ RTA link ■ Job history (if available) **VIDEO:** Learn about debugging publishing information in the *Debugging Publishing Information* video (1:52 mins).
	Edit Service	Opens the Electronic Service Editor, enabling you to edit the electronic service record.
	Send to Ex Libris	Opens the Send to Ex Libris page, enabling you to send a collection update request to Ex Libris. The contact information provided on the Send to Ex Libris page is defined by a General System Administrator in **Administration > General Configuration > Configuration Menu > CRM Contacts**. **NOTE:** You can request that new resources to be added to the KB and view existing requests from other customers and promote them via Salesforce. For more information, see the **How can I search for KB items and vote for them?** section of the **Salesforce CRM Customer Portal Documentation** guide.

Table 6. Search Results List Actions

Search Type	Action	Description
Electronic Collection (Institution tab) (continued)	More Info	Opens the More Info dialog box that displays the following information: ■ Title ■ Related Records - number of related records (or No Related Records) ■ Orders - number of orders (or No Orders) ■ Licenses - number of licenses Refer to **Associating a License at the Portfolio Level** on page 384 and **Managing Licenses and Amendments** in the *Alma Acquisitions Guide* for related information. ■ Courses - number of linked courses (No Course) Click the links that are displayed in this dialog box to access additional details. **VIDEO:** For information on displaying the courses associated with a title, see the *View Courses Linked to a Title* video (2:43 mins).
Electronic Collection (Community tab)	Portfolio List (number)	Opens the Portfolios List page. The (number) represents the number of portfolios to be displayed on the Portfolios List page.
	Activate	Opens the Activation Wizard (refer to **Using the Activation Wizard** on page 406), enabling you to activate the resource.
	Order	Opens the PO Line Owner and Type page to initiate a purchase request (refer to **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*).
	Send to Ex Libris	Opens the Send to Ex Libris page, enabling you to send a collection update request to Ex Libris. The contact information provided on the Send to Ex Libris page is defined by a General System Administrator in **Administration > General Configuration > Configuration Menu > CRM Contacts**.

Table 6. Search Results List Actions

Search Type	Action	Description
Authorities (Institution tab)	Search Bibliographic Records Matching This Value	Lists the local authority information that is maintained in the IZ.
	Edit	Enables you to edit local authority information.
Authorities (Community tab)	Search Bibliographic Records Matching This Value	Lists the available LC authority information from the authority information that is loaded in the Alma CZ.

What Displays in the Repository Search Results (Examples)

Since the Repository Search facility in Alma provides the flexibility to conduct a variety of searches, the search results include information related to physical, electronic, and digital resources. As a result, the content of the search results vary and are specific to the type of search you are conducting. For example, the titles (all, physical, electronic, and digital) search results display bibliographic information; and the inventory (such as items, portfolios, and files) search results display details from imported data or data that you have entered using the Physical Item Editor (refer to **Updating Item-Level Information** on page **465**) or the Electronic Portfolio Editor (refer to **Modifying a Portfolio Using the Electronic Portfolio Editor** on page **349**). In general, the Repository Search results display:

- Title
- Material type

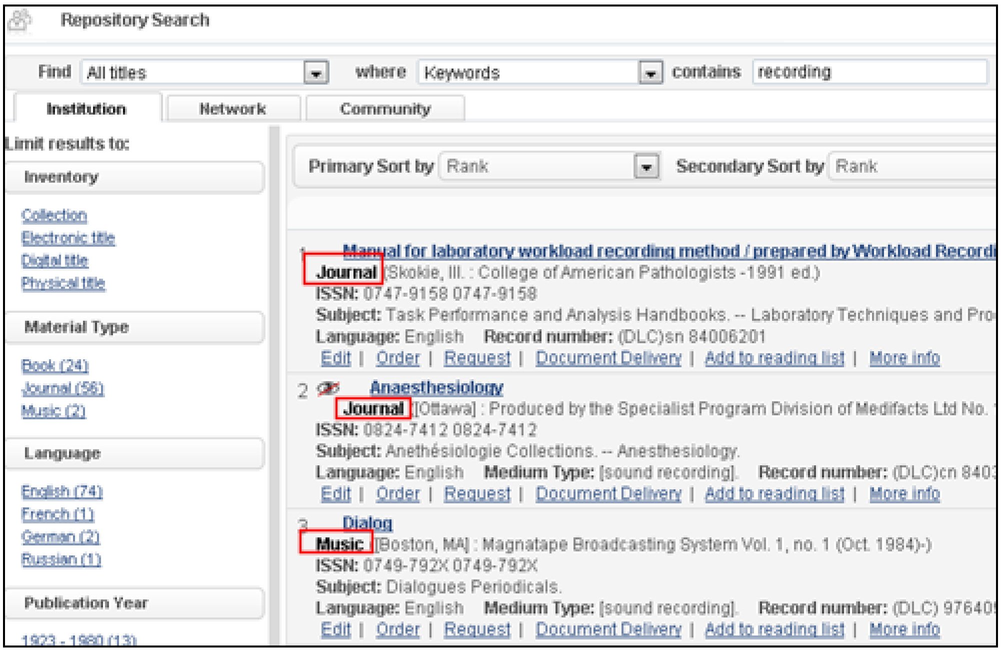


Figure 21: Bibliographic Material Type in Search Results

Refer to **Bibliographic Material Types Identified in Search Results** on page **65** for more information regarding bibliographic material types. Refer to **Search Indexes** on page **115** for a list of the MARC tags associated with all the displayed fields.

- Subject
- Library
- Location
- Copy
- Barcode
- Item policy
- Identifying numbers
  - Alma record number (the last number in 035a, the Other System Number)
  - ISSN, ISBN
  - Call number
- Dates

- Availability

  This component of the search results provides a link for accessing additional record details.

Figure 22: Availability in the Search Results

- Availability of related records

  The **Availability of Related Records** displays in the search results when a bibliographic record is found that has no items, but contains a 773 field with linking information to another bibliographic record with items.

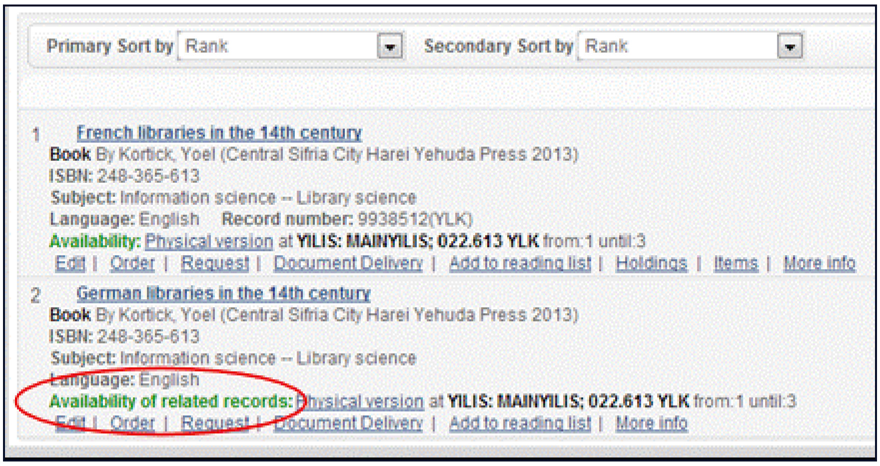


Figure 23: Availability of Related Records

- Service

- Icons

  For example, if a record is linked to the Community Zone, it displays the icon next to it; or if a record has been suppressed from external discovery, the **Suppressed** icon displays next to the record.

  If you are working in a collaborative network environment, there are additional icons and indicators displayed in the Network and Institution tabs.

The illustrations below highlight the following search result examples:

- All titles
- Physical titles
- Electronic titles
- Digital titles
- Digital files
- Physical items
- Electronic portfolio
- Collection
- Electronic collection (Institution tab)
- Electronic collection (Community tab)
- Authorities (Community tab)

All titles search results (Institution tab):

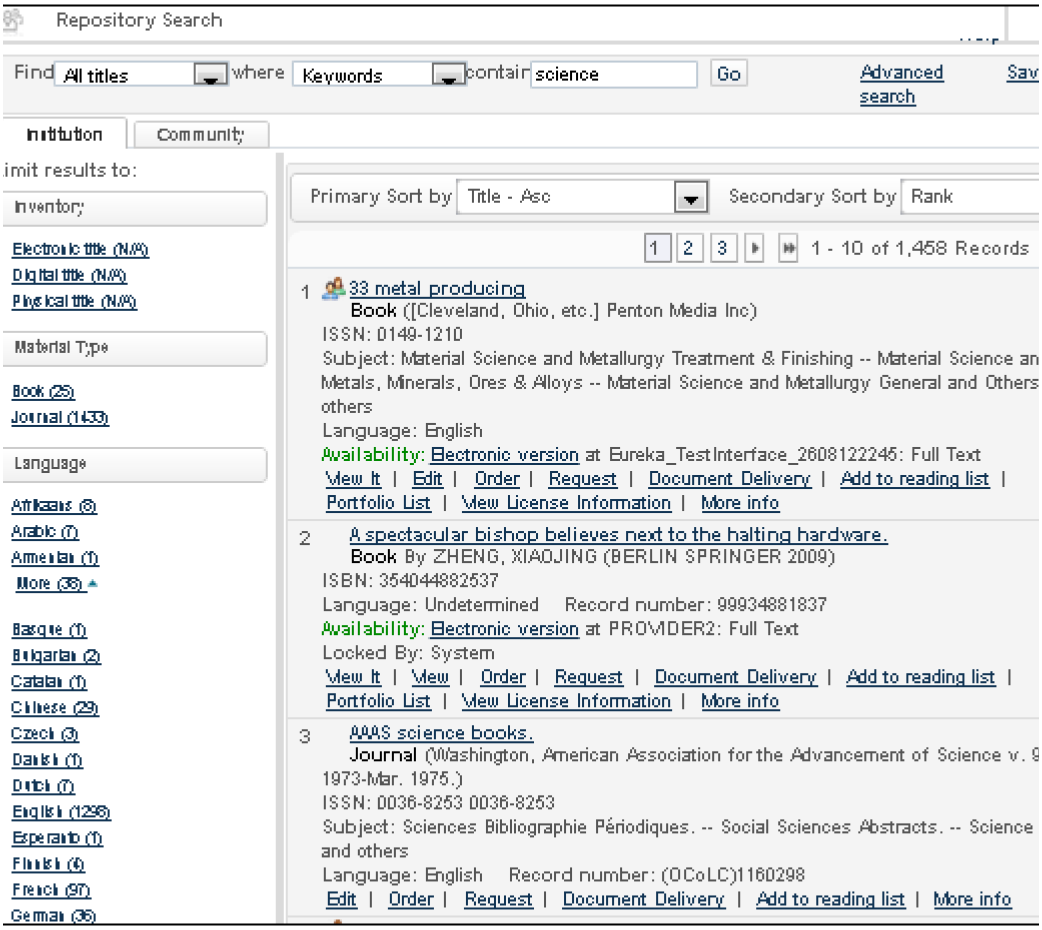


Figure 24: Repository Search Page with the Results of All Titles Search

Physical titles search results (Institution tab):

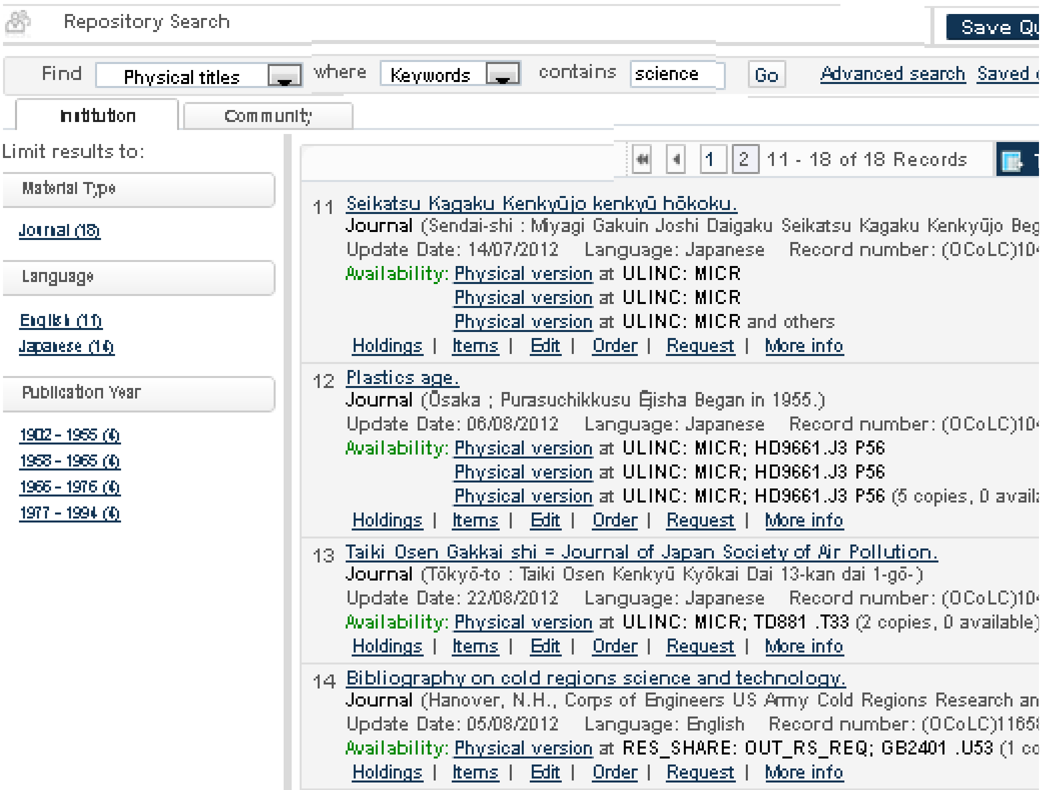


Figure 25: Repository Search Results for a Physical Titles Search

Electronic titles search results (Institution tab):

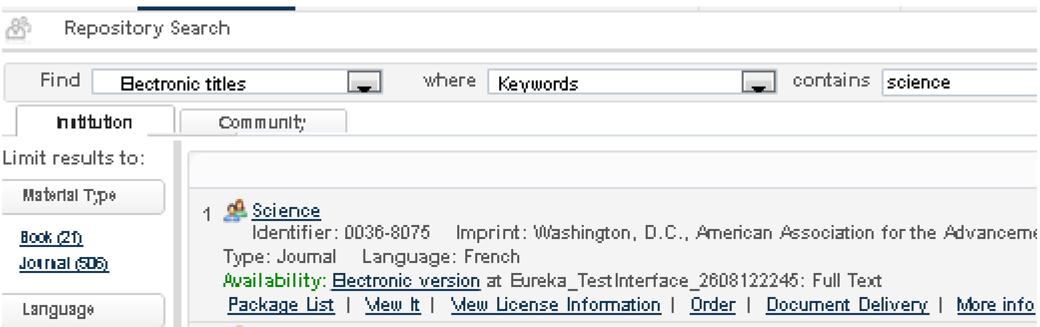


Figure 26: Repository Search Page with Results of an Electronic Titles Search

Digital titles search results (Institution tab):

Figure 27: Repository Search Page with Results of a Digital Titles Search

Digital files search results (Institution tab):

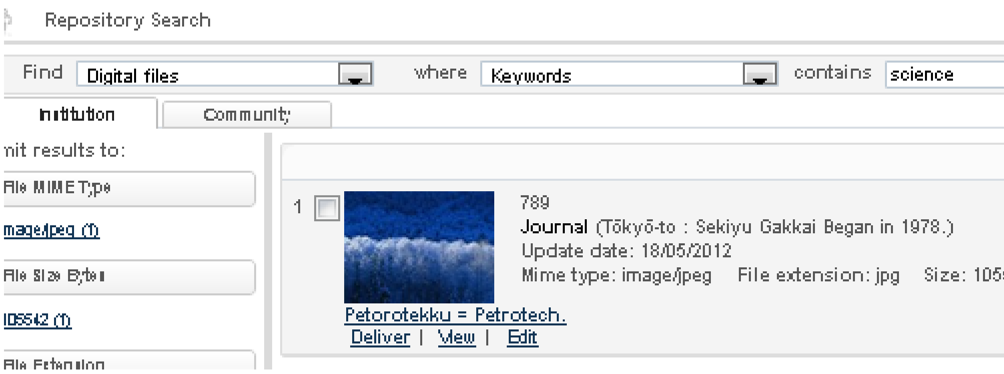


Figure 28: Digital Files Search Results List

Physical items search results (Institution tab):

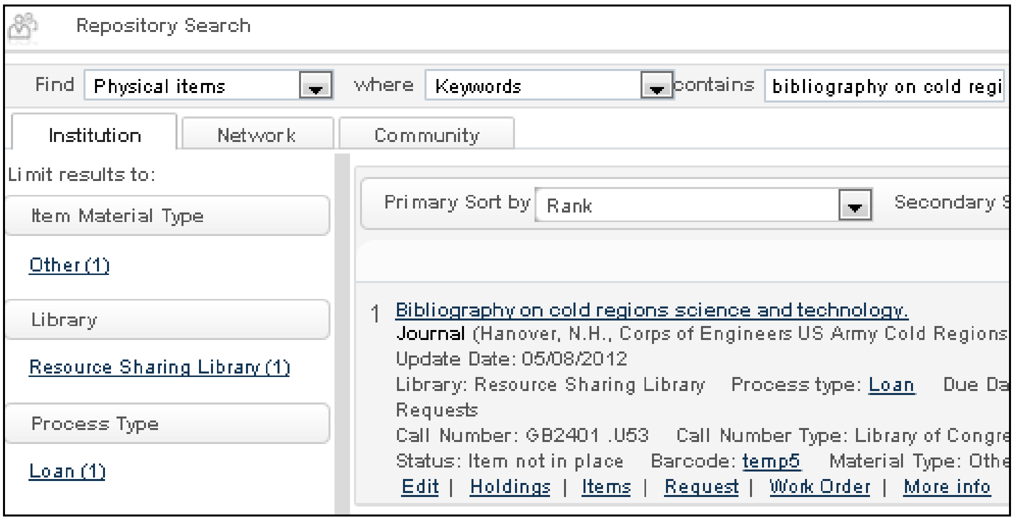


Figure 29: Repository Search Page with Results of a Physical Items Search

Electronic portfolio search results (Institution tab):

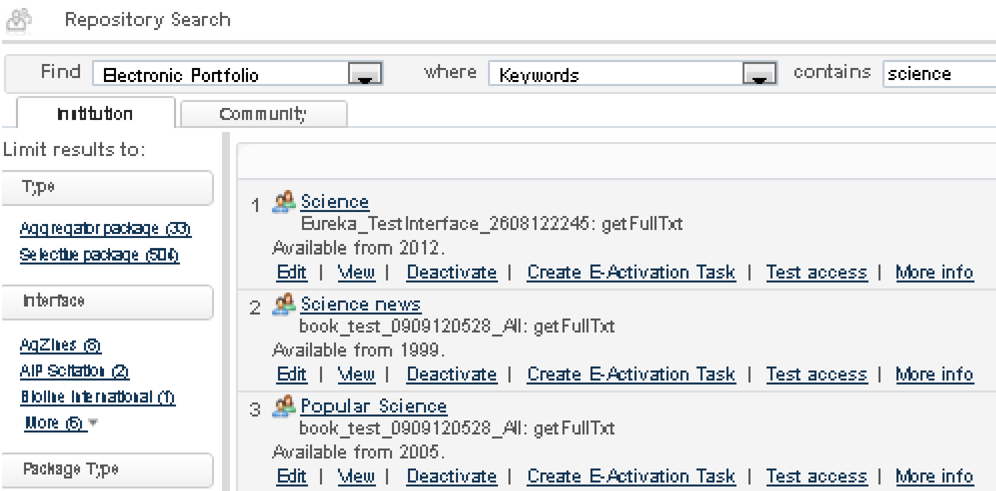


Figure 30: Electronic Portfolio Search Results

Collection search results (Institution tab):

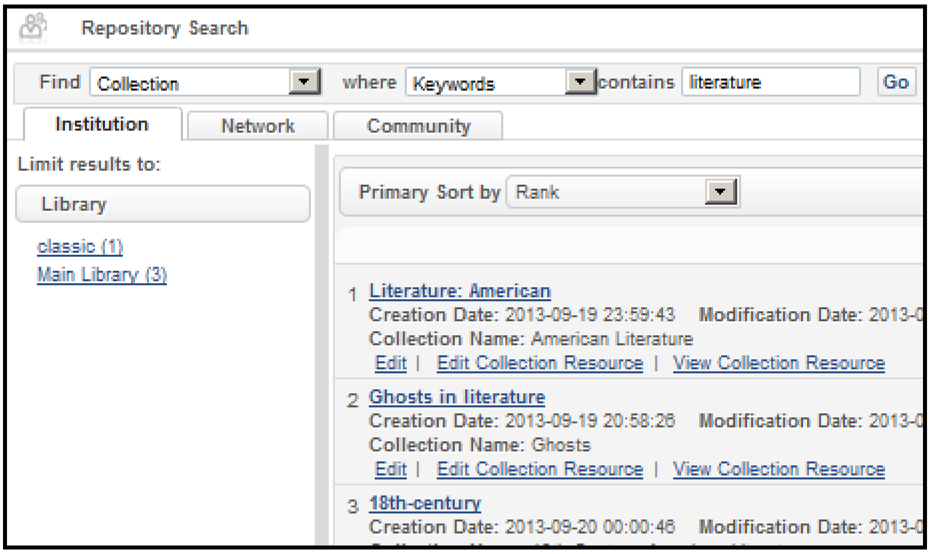


Figure 31: Collection Results (partial)

Electronic collection search results (Institution tab):

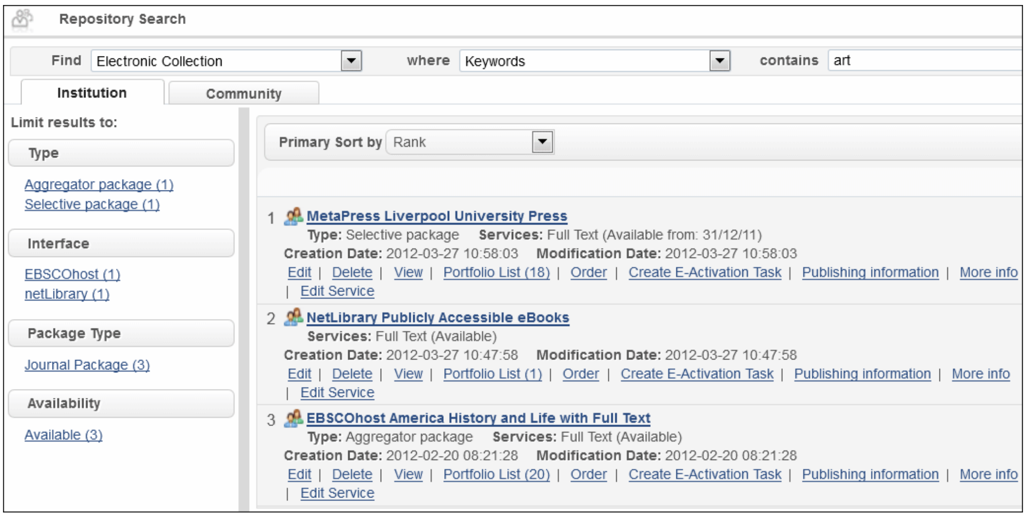


Figure 32: Electronic Collection Search Results – Institution Tab

Electronic collection search results (Community tab):

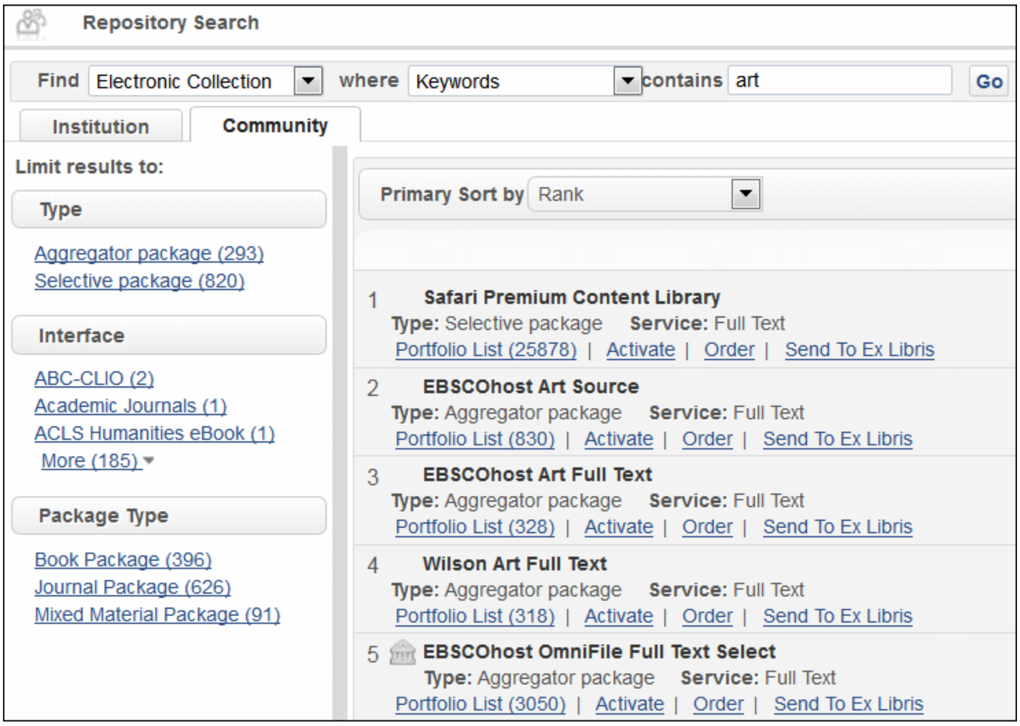


Figure 33: Electronic Collection Search Results – Community Tab

Authorities search results (Community tab):

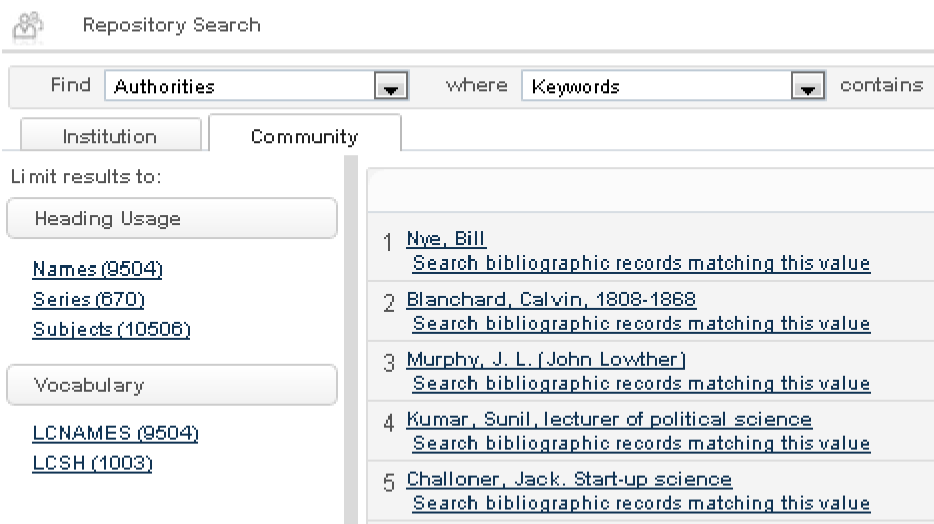


Figure 34: Repository Search Page with Results of an Authorities Search (Community Tab)

Bibliographic Material Types Identified in Search Results

The following bibliographic material types are identified in Alma's search results:

- Books
- Journals
- Computer files
- Maps
- Music
- Visual materials
- Mixed materials

Refer to the illustration **Figure 21** for material type.

Bibliographic material types are identified using the MARC 21 format for bibliographic data (described in **Table 7**) and an Alma mapping table (**Table 9**).

Table 7. Scope of the Bibliographic Format

Scope of the Bibliographic Format (MARC 21 - www.loc.gov/marc/bibliographic)
MARC 21 Format for Bibliographic Data is designed to be a carrier for bibliographic information about printed and manuscript textual materials, computer files, maps, music, journals, visual materials, and mixed materials. Bibliographic data commonly includes titles, names, subjects, notes, publication data, and information about the physical description of an item. The bibliographic format contains data elements for the following types of material: ■ **Books (BK)** - used for printed, electronic, manuscript, and microform textual material that is monographic in nature. ■ **Journals (CR)** - used for printed, electronic, manuscript, and microform textual material that is issued in parts with a recurring pattern of publication (e.g., periodicals, newspapers, yearbooks). (NOTE: Prior to 2002, Journals (CR) were referred to as Serials (SE)). ■ **Computer files (CF)** - used for computer software, numeric data, computer-oriented multimedia, online systems or services. Other classes of electronic resources are coded for their most significant aspect. Material may be monographic or serial in nature. ■ **Maps (MP)** - used for all types of printed, electronic, manuscript, and microform cartographic materials, including atlases, sheet maps, and globes. Material may be monographic or serial in nature. ■ **Music (MU)** - used for printed, electronic, manuscript, and microform music, as well as musical sound recordings, and non-musical sound recordings. Material may be monographic or serial in nature. ■ **Visual materials (VM)** - used for projected media, non-projected media, two-dimensional graphics, three-dimensional artifacts or naturally occurring objects, and kits. Material may be monographic or serial in nature. ■ **Mixed materials (MX)** - used primarily for archival and manuscript collections of a mixture of forms of material. Material may be monographic or serial in nature. (NOTE: Prior to 1994, Mixed materials (MX) were referred to as Archival and manuscript material (AM)).

These material types are identified from the bibliographic fields highlighted in **Table 8**.

Table 8. Fields that Identify the Bibliographic Material Type

LDR POSN 6	LDR POSN 7	007 POSN 00	Alma Bibliographic Material	Alma Material Type Term
a	a c d m		BK	Book
t			BK	Book
a	b i (s)		CR	Continuing Resource
c d l j			MU	Music
e f			MP	Map
g k r o			VM	Visual Material
m			CF	Computer File
p			MX	Mixed material
a	s		SE	Journal
<Default>			BK	Book

In the mapping table below (**Table 9**) that is used to determine the bibliographic material type code, `source1` corresponds to leader position 6 and `source2` corresponds to leader position 7.

Table 9. Alma Mapping Table for Bibliographic Material Type

<ref:targetColumn description="Material Type Code" style="" readOnly="true" number="2" name="CODE"/>
<ref:mappingTable displayTableName="Marc21 Bibliographic Material Type" tableName="Marc21BibMaterialType">
<ref:table customerBehavior="HIDE" spPolicy="MERGED" tableLevel="ALL" subSystem="DATA_MODEL" enabled="true" description="Marc21 Bibliographic Material Type"/>
<ref:columns>
<ref:source1Column description="LDR position 6" style="" readOnly="true" number="0" name="POS6"/>
<ref:source2Column description="LDR position 7" style="" readOnly="true" number="1" name="POS7"/>
<ref:targetColumn description="Material Type Code" style="" readOnly="true" number="2" name="CODE"/>
</ref:columns>
<ref:mappings>
<ref:mapping targetCode="BK" source1="a" source2="a"/>

Table 9. Alma Mapping Table for Bibliographic Material Type

<ref:mapping targetCode="BK" source1="a" source2="c"/>
<ref:mapping targetCode="BK" source1="a" source2="d"/>
<ref:mapping targetCode="BK" source1="a" source2="m"/>
<ref:mapping targetCode="BK" source1="t" source2=" "/>
<ref:mapping targetCode="CR" source1="a" source2="b"/>
<ref:mapping targetCode="CR" source1="a" source2="i"/>
<ref:mapping targetCode="CR" source1="a" source2="s"/>
<ref:mapping targetCode="MU" source1="c"/>
<ref:mapping targetCode="MU" source1="d"/>
<ref:mapping targetCode="MU" source1="i"/>
<ref:mapping targetCode="MU" source1="j"/>
<ref:mapping targetCode="MP" source1="e"/>
<ref:mapping targetCode="MP" source1="f"/>
<ref:mapping targetCode="VM" source1="g"/>
<ref:mapping targetCode="VM" source1="k"/>
<ref:mapping targetCode="VM" source1="o"/>
<ref:mapping targetCode="VM" source1="r"/>
<ref:mapping targetCode="CF" source1="m"/>
<ref:mapping targetCode="MX" source1="p"/>
</ref:mappings>
</ref:mappingTable>

Working with Jointly Managed E-Resources (Search/Search Results)

Alma Repository Search provides the flexibility to view results determined by the Available For assignment of resources. Depending on your environment's configuration (multicampus or collaborative network), you can view resources in your search results that belong exclusively or jointly to Available For groups whose members can be campuses, libraries, or institutions. With this capability, Alma provides a clearer view of the electronic resources' availability per campus/institution allowing you to easily visualize the similarities and differences between electronic resources' availability.

NOTE:

For more information regarding Available For, refer to **Configuring Inventory Available For Management Groups for Multicampus**

Environments on page **730** or **Configuring Inventory Available For Management Groups for Collaborative Environments** on page **48**.

Alma provides the following search/search results facilities for jointly managed resources using their Available For assignment:

- Available For group details provided for each record in the repository search results for portfolios and electronic collections (refer to **Available For Search Results** on page **69**)
- Search attributes in the Advanced Search for Available For groups (refer to **Available For Search Attributes** on page **70**)
- Available For facets (refer to **Available For Facets** on page **72**)

Available For Search Results

The details provided in portfolio and electronic collection search results include Available For group/member/institution details. When you do a portfolio search and group settings are configured at the portfolio level, an Available For label/row displays in the search results followed by a list of the groups that the portfolio is available for. When you point to the Available For row, a tooltip opens that identifies the members of the group(s) listed in the Available For row.

Figure 35: Available For Group Details in Search Results

Refer to the illustration below for the portfolio-level group settings for *Procedia in vaccinology*.

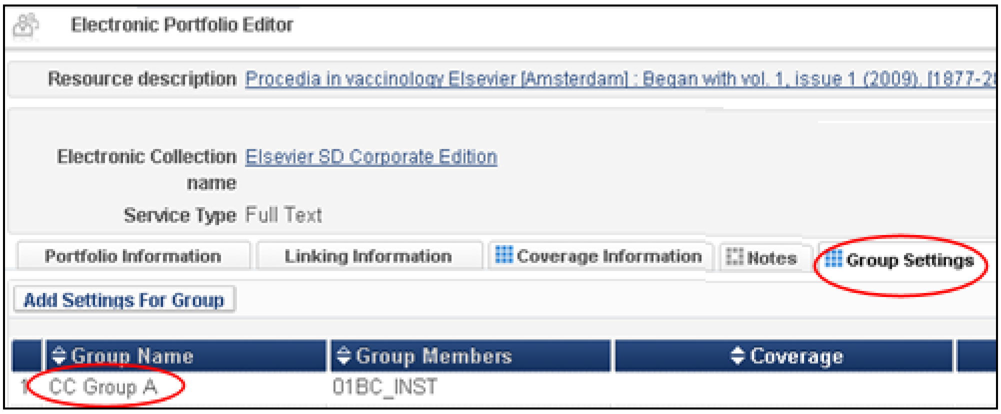


Figure 36: Portfolio-Level Group Settings Example

When you do an electronic collection search and group settings are configured at the collection level, an Available For label/row displays in the search results followed by a list of the groups that the collection is available for. When you point to the Available For row, a tooltip opens that identifies the members of the group(s) listed in the Available For row.

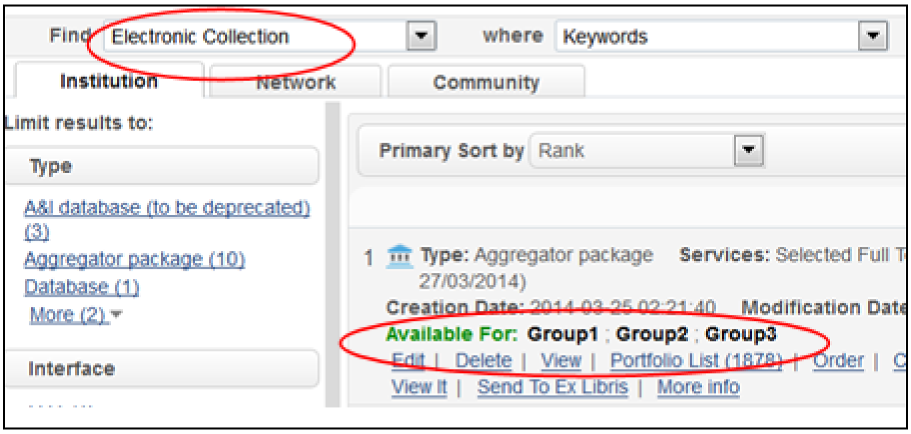


Figure 37: Electronic Collection Available For Search Result Details

Available For Search Attributes

When doing an advanced search for an electronic collection or portfolios, the following search attributes are available:

- Electronic collections (refer to the first illustration below)
  - Collection available for group
  - Collection available only for group

- Portfolios (refer to the second illustration below)
  - Available for group
  - Available only for group

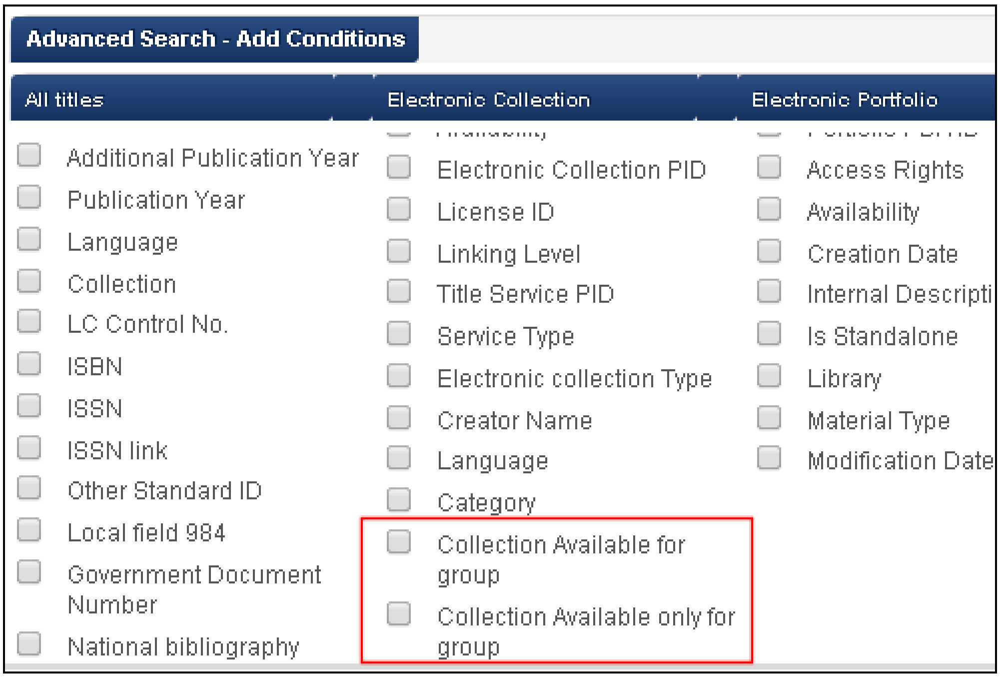


Figure 38: Electronic Collection Advanced Search Attributes for Available For Groups

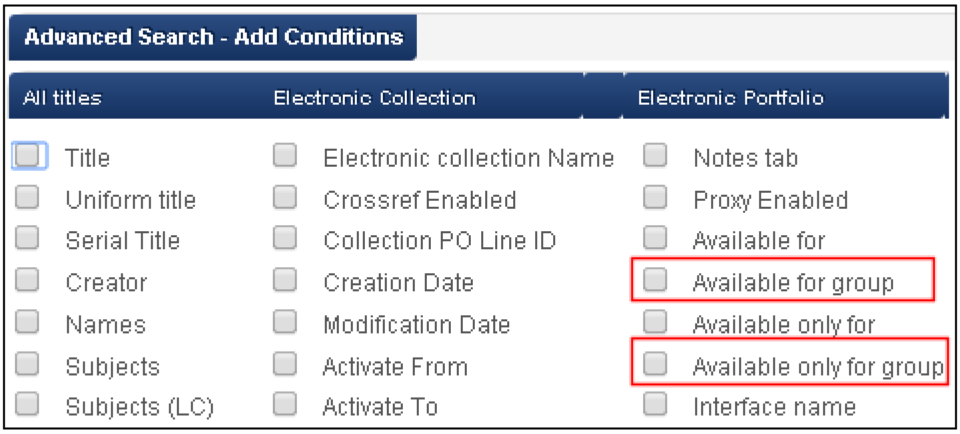


Figure 39: Portfolio Advanced Search Attributes for Available For Groups

When you select one of the Available For group options, the drop-down list of search options provided displays a list of Available For groups.

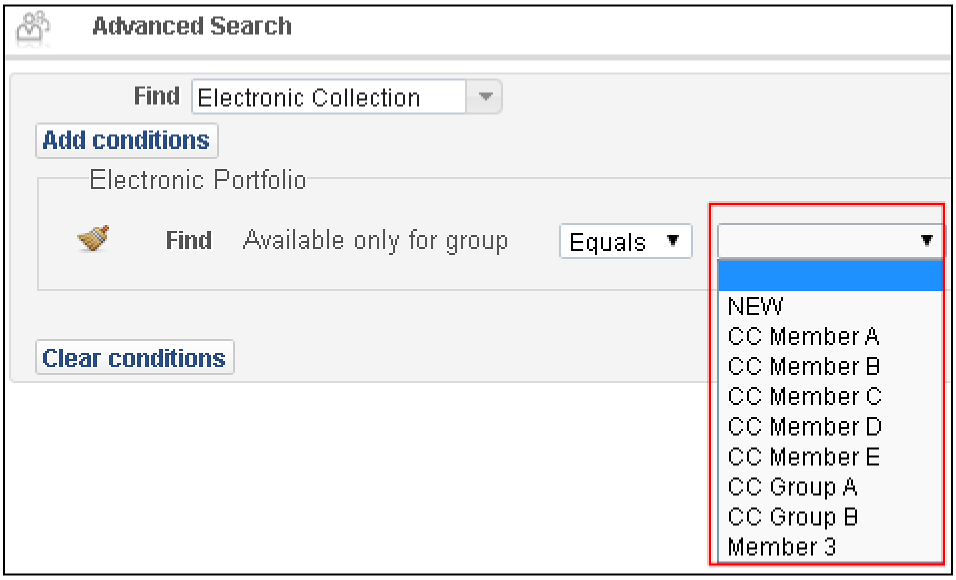


Figure 40: Available For Group Options (Drop-Down List)

Available For Facets

The search result facets have been enhanced for Available For to include group/ member-level information in a tooltip when you point to the Available For campus. This enables you to determine which groups are associated with the campus.

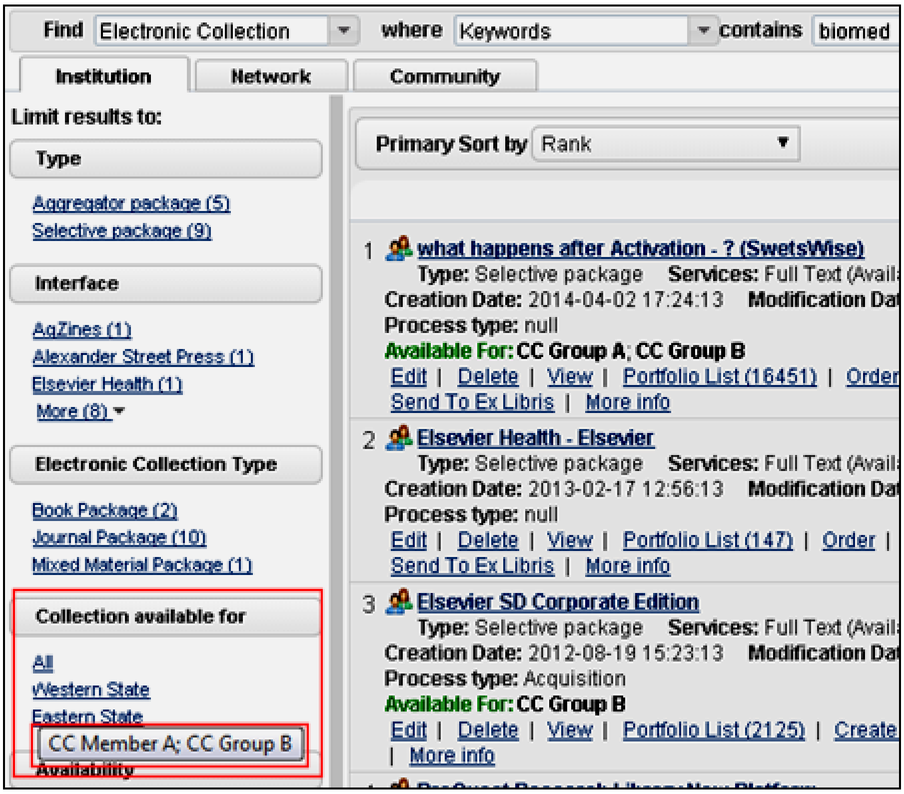


Figure 41: Tooltip for Available For Facets to Identify Groups/Members

Using the Portfolios List

The Portfolios List page displays the portfolios that are associated with an electronic collection. This list displays after clicking any of the following links:

- **Electronic Collection List** – Displays in the results for electronic title/ collection searches.
- **Portfolio List (number)** – Displays in the results for electronic collection searches.
- **Number of portfolios** – Displays on the **Additional Information** tab in the Electronic Collection Editor.

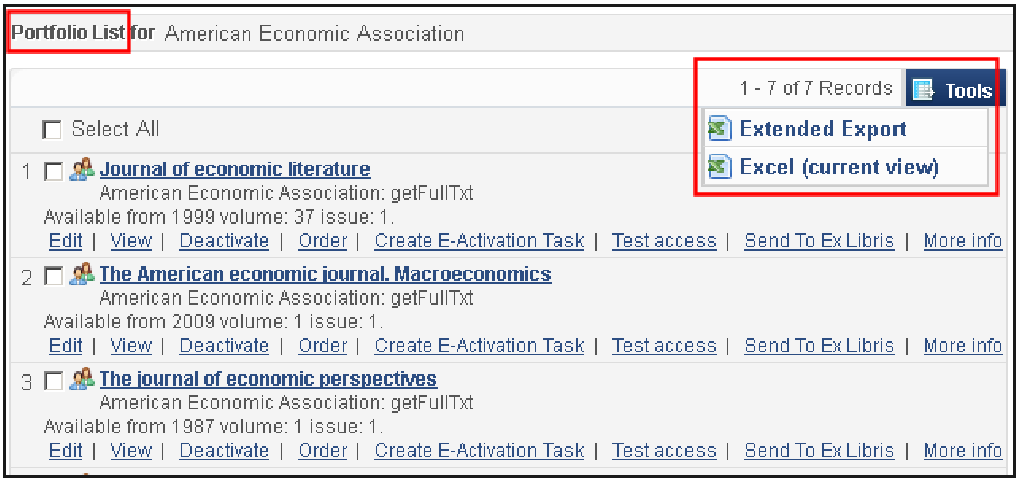


Figure 42: Portfolios List Page

On this page, you can perform the following actions (with the appropriate role/ permissions):

- Edit – Opens the Electronic Portfolio Editor page to edit the portfolio record. For more information, see **Modifying a Portfolio Using the Electronic Portfolio Editor** on page **349**.
- Activate/Deactivate – Activates/deactivates an electronic portfolio
- View – Opens the Electronic Portfolio Editor page to view the portfolio record
- Document Delivery – Opens the Create Request page.
- Order – Opens the PO Line Owner and Type page to initiate a purchase request (see **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*). This includes the ability to order a portfolio from an e-collection that is already locally activated.
- Create E-Activation Task – Creates an electronic activation task and displays a confirmation message when successful

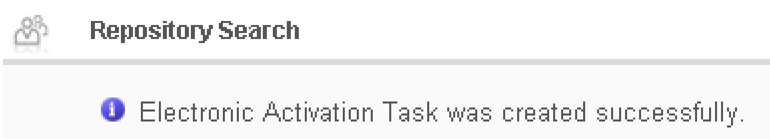


Figure 43: E-Activation Task Successfully Created

- Test access – Tests the access to an electronic portfolio and displays the results on the Alma Resolver Electronic Services page.
- Send to Ex Libris – Opens the Send To Ex Libris page in order for you to submit a request.

- More info – Opens the More info dialog box.
- Delete – Opens a Delete Confirmation dialog box for the portfolio and provides the option to delete childless bibliographic records during the deletion.

In addition, you can run the following tools:

- Extended Export – Select **Tools > Extended Export** to export all portfolios in the collection to an Excel file. If the collection contains more than 5000 portfolios, portfolios for each type of service are stored in separate files and the job is run in the background. You can use the Monitor Job page (**Administration > Manage Jobs > Monitor Jobs**) to monitor the job's progress and view the Excel files. Collections with fewer portfolios are also saved to an Excel file, but the job is run in the foreground and portfolios for each type of service are stored in separate tabs in the Excel file.

NOTE:
The portfolio loader supports the matching of CZ portfolios based on the CZ portfolio ID and not just the ISSN or ISBN.

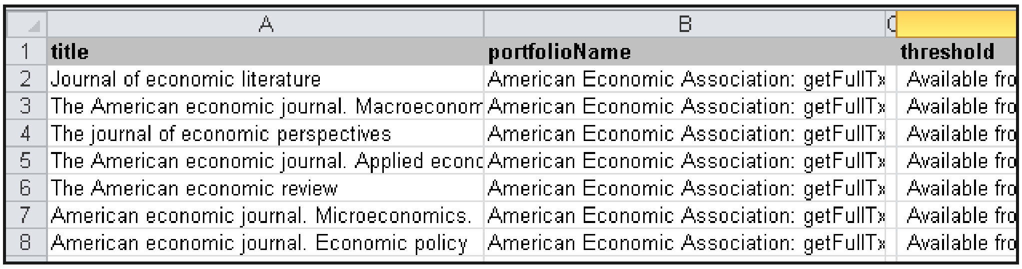
The **localized** field in the Excel file indicates that a CZ portfolio has been localized for your institution.

	A	B	C	D	E	F	G	H	I	
1	LOCALIZED	ISSN	ISSN	ISSN	ISBN	ISBN	ISBN	PORTFOLIO_PID	MMS	TITLE
2	Y	1945-7731	1945-774X					53766566150001161	99198615110001161	American ed
3	Y	1945-7669	1945-7685					53766566170001161	99198615120001161	American ed
4	Y	0002-8282	1944-7981					53766566190001161	99198694470001161	The America
5	Y	1945-7782	1945-7790					53766566210001161	99198615090001161	The America
6	Y	0895-3309	1944-7965					53766566230001161	99197723510001161	The journal o
7	Y	1945-7707	1945-7715					53766566250001161	99198615100001161	The America
8	Y	0022-0515	2328-8175					53766566270001161	99197675520001161	Journal of ed

Figure 44: Sample Extended Excel Export

VIDEO:
For more information about the Extended Export tool, see the *Export Tasks From CZ Updates Task List* video (3:43 mins).

- Excel (current view) – Select **Tools > Excel (current view)** to export the list of portfolios to an Excel file. Note that the report contains only information that displays in the Portfolio List.



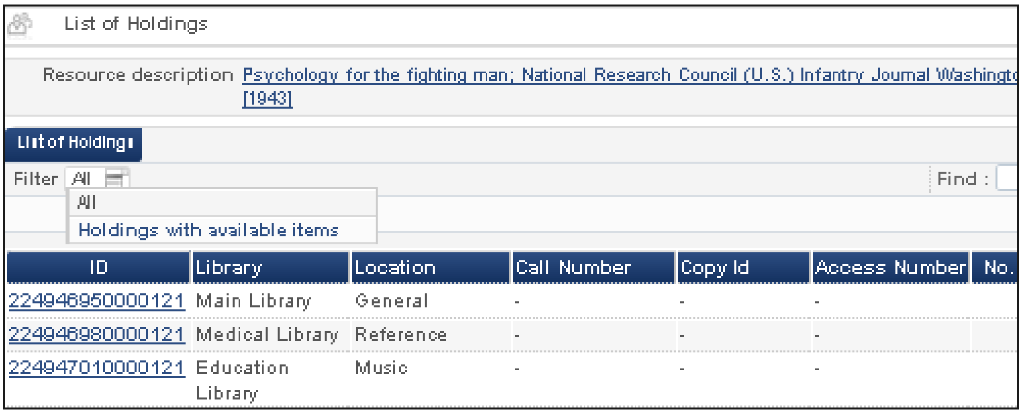
	A	B	C
1	title	portfolioName	threshold
2	Journal of economic literature	American Economic Association: getFullTx	Available fro
3	The American economic journal. Macroeconom	American Economic Association: getFullTx	Available fro
4	The journal of economic perspectives	American Economic Association: getFullTx	Available fro
5	The American economic journal. Applied econc	American Economic Association: getFullTx	Available fro
6	The American economic review	American Economic Association: getFullTx	Available fro
7	American economic journal. Microeconomics.	American Economic Association: getFullTx	Available fro
8	American economic journal. Economic policy	American Economic Association: getFullTx	Available fro

Figure 45: Sample Excel (Current View) Report

Using the List of Holdings

The List of Holdings page lists the holdings (with the MMS ID link) for the selected resource. This list displays after clicking any of the following links:

- Holdings – displays in the results for physical title and item searches.
- View all holdings – displays in the Physical Item Editor.



ID	Library	Location	Call Number	Copy Id	Access Number	No.
224946950000121	Main Library	General	-	-	-	
224946980000121	Medical Library	Reference	-	-	-	
224947010000121	Education Library	Music	-	-	-	

Figure 46: Holdings List Page

The List of Holdings page provides a filter option to display only holdings with available items and includes an Actions button that enables you to:

- Edit – Opens the MD Editor page allowing you to edit the holdings record. For more information, see **Navigating the MD Editor Page** on page **149**.
- View – Displays the holdings record on the MARC Record Simple View page.
- Relink – Opens the MD Editor in split view allowing you to relink the holdings record to a bibliographic record. To relink the holdings record, enter your search criteria for the bibliographic record and then click **Relink** below the bibliographic record's information in the search results. This also updates the bibliographic record to which the associated PO line is linked.

Figure 47: Relink Holdings Record in MD Editor

For more information on using the MD Editor, see **Navigating the MD Editor Page** on page **149**.

- View items – Opens the List of Items page allowing you to view the items that are associated with the holdings record (see **Using the List of Items** on page 77).
- Associate a PO line – Enables you to associate a PO line with a holdings record. Select a PO line from the dialog box and click **Update**. The associated PO line is displayed in the **PO Line** column.

If you want to delete empty holdings records, select the holdings records in the list of holdings and click **Delete Holdings**. The system will not let you remove holdings records that contain items.

Using the List of Items

The List of Items page lists the items for the selected resource and displays after clicking one of the following links:

- Items – displays in the results for physical item searches.

- View all items – displays in the Physical Item Editor.

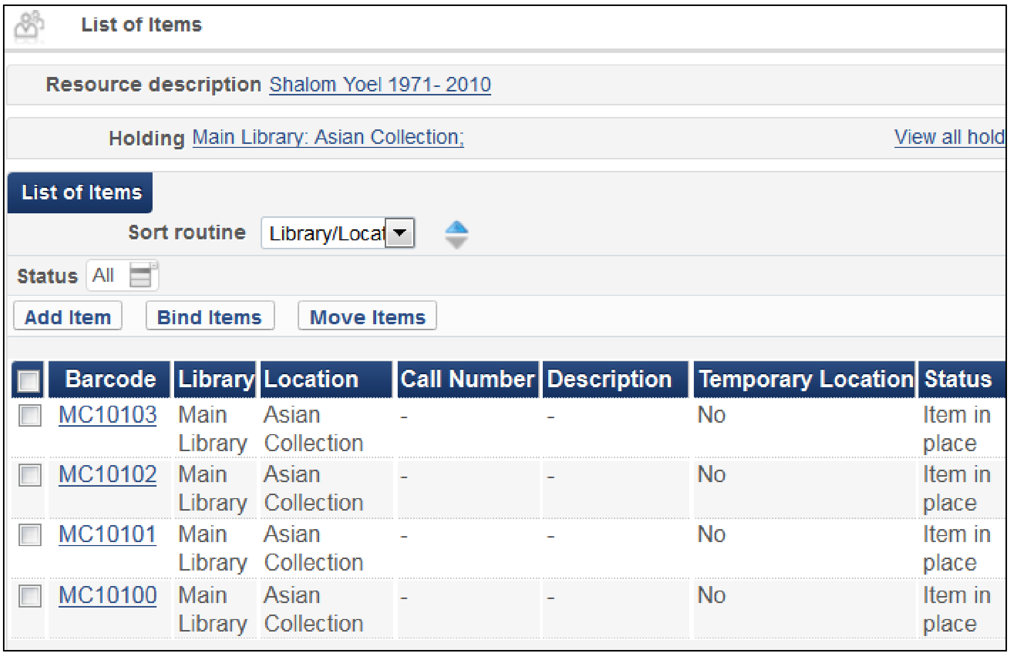


Figure 48: List of Items Page

The **View All Holdings** link enables you to view the holdings for the record. For more information, see **Using the List of Holdings** on page 76.

The List of Items page provides a barcode link (Barcode column) to the Physical Item Editor page, allows you to filter the list of items by status, and enables you to sort according to the sort routines that were configured (see **Configuring Physical Item Sort Routines** on page 734).

The **Move Items** button enables you to move the selected items to a different holdings record.

The following two buttons are available if the items' associated bibliographic record has only one holdings record:

- **Add Item** – Open the Physical Item Editor and add an additional item.
- **Bind Items** – Select the check box of at least two items to bind the selected items together into one. For details, see **Binding Items** below.

The **Actions** button at the end of each row enables you to:

- View – Opens the Physical Item Editor page in read-only mode.
- Duplicate – Opens the Physical Item Editor page, allowing you to add a duplicate copy to the holdings. For more information, see **Updating Item-Level Information** on page 465.

- Move item (request) – Opens the Create Request page, allowing you to submit a permanent or temporary move item request. For more information, see **Creating a Request** in the *Alma Fulfillment Guide*.
- Edit – Opens the Physical Item Editor page, allowing you to update item-level information. For more information, see **Updating Item-Level Information** on page **465**.
- Withdraw (if you have the required permissions) – Opens the Confirmation Message dialog box, asking you to confirm the deletion of an item. Click **OK** to remove the item. For more information on withdrawals, see **Withdrawing an Item** on page **472**.

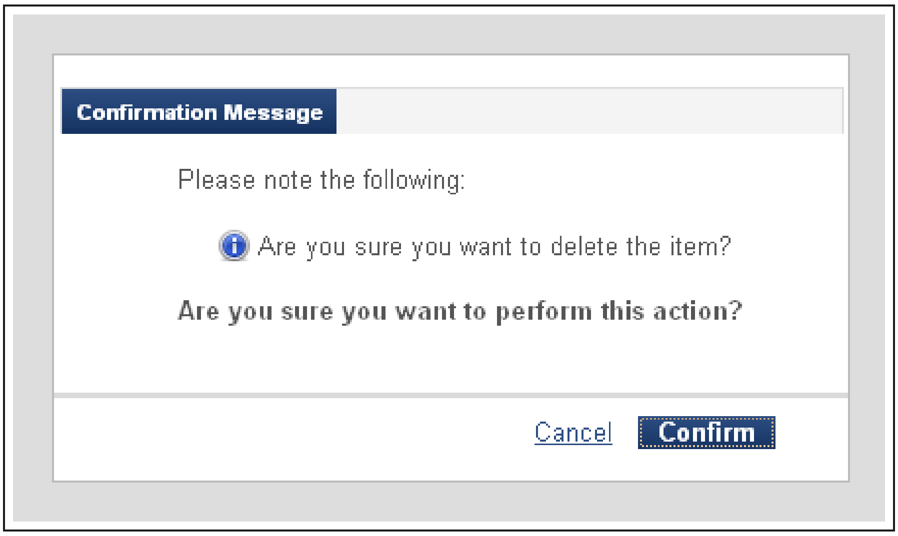


Figure 49: Confirmation Message Dialog Box

- Toggle missing status – Toggles the item status between **Item in place** and **Item not in place**; the **Process Type** also toggles to **Missing** when the status is **Item not in place**.
- Work order – Opens the Create Work Order page, allowing you to create a work order process for the item. For details on work order requests, see **Creating a Work Order Request** in the *Alma Fulfillment Guide*.

Binding Items

You can select two or more items on the List of Items page to combine them into a single item. Items can be bound only if they are in place, are not in the acquisition process, and have not been bound previously.

To bind items together:

1 On the List of Items page, select the check boxes for two or more items and click **Bind Items**. The Bind Items – Items List page opens.

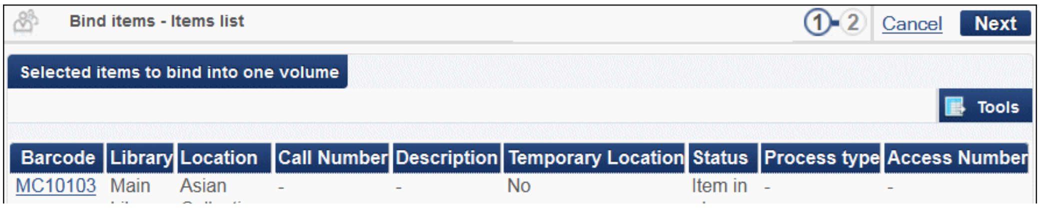


Figure 50: Bind Items - Items List Page

2 Click **Next**. The Bind Items – Generate Work Order page opens.

Figure 51: Bind Items - Generate Work Order Page

3 Optionally, select a work order type and work order department from the relevant fields, and add notes in the **Note** field. Choose from the following options:

- Click **Create and Edit** to create the newly bound item and open the Physical Item Editor page, where you can edit the item's details (see **Updating Item-Level Information** on page **465**).
- Click **Create** to create the newly bound item. The item is displayed as a single item on the List of Items page.

Figure 52: List of Items Page - Bound Item

Managing Search Queries and Sets

PERMISSIONS:

To manage search queries and sets, you must have one of the following roles:

- Cataloger
- Catalog Manager
- Catalog Administrator
- Electronic/Digital Inventory Operator
- Repository Manager
- Requests Operator

Sets may be used for saving queries, publishing metadata, moving a group of records to the editor and for running processes. For information on running processes for defined sets, see **Running Jobs on Defined Sets** in the *Alma Administration Guide*.

By default, the Manage Sets page (refer to the figure below), opens on the My Sets tab. The My Sets tab comprises the search queries that you have saved (both private and public). There are also tabs for:

- Public Sets – Saved queries that are not marked private
- All Sets – All saved public queries (created by you and other users) and your saved queries.

NOTE:

The **All Sets** tab is available only to users with the role of Repository Manager and includes all the sets that are defined in the system. This role is also required in order to edit public sets.

To manage sets:

Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

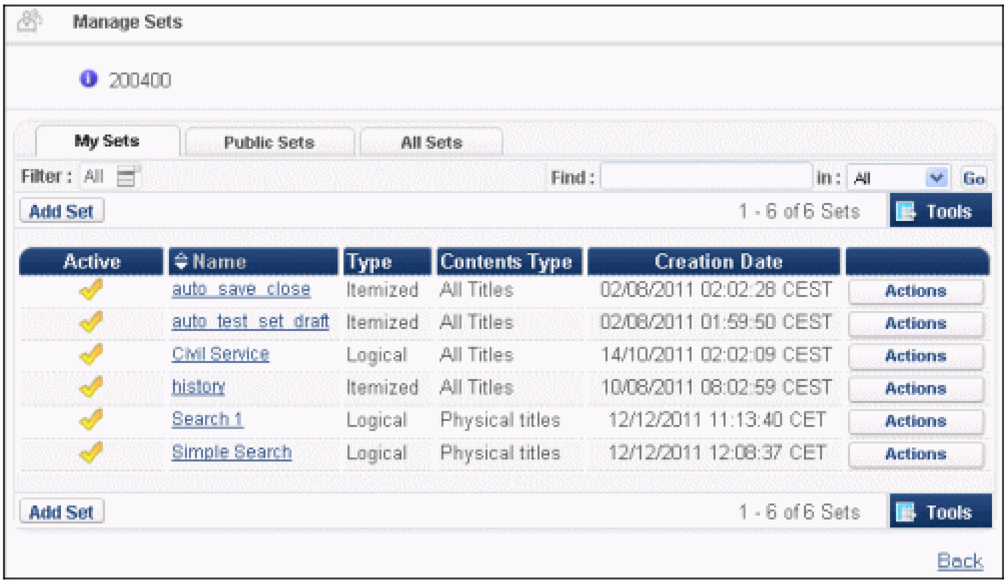


Figure 53: Manage Sets Page

The Manage Sets page has the columns described in the following table.

Table 10. Manage Sets Page Columns

Column Name	Description
Active	Indicates if the set is **Active** or **Inactive** . Click on the check mark to make the set **Active** or **Inactive**.
Name	Identifies the unique name of the set.
Type	Indicates if the set is: ■ Logical – This is the same as a saved query (see **Saving Queries** on page **32**), the population of which is determined by the results of the particular search associated with the set (see **Adding Logical Sets** on page **89**). ■ Itemized – This comprises the individual records in the repository, selected by the search operator and associated with the set (see **Adding Itemized Sets** on page **84**).
Created By (only available on the **Public Sets** and **All Sets** tabs)	Identifies the name of the user who created the set.

Table 10. Manage Sets Page Columns

Column Name	Description
Content Type	Identifies the content of the set as selected in the Find drop-down list (see **Using the Alma Repository Search** on page 18 or **Adding and Modifying Sets** on page 84).
Creation Date	Specifies the date and time the set was created.

Each line on the Manage Sets page has an **Actions** button that enables you to perform the tasks described in the table below.

Table 11. Actions Button Options

Actions Options	Description
Edit	Opens the Set Details page that enables you to modify the set parameters (see **Editing Itemized Sets** on page 91).
Catalog Set	Moves the contents of the set to the Metadata Editor for easier cataloging workflow. For more information regarding the Metadata Editor, see **Opening the Metadata Editor** on page 147.
Members (itemized sets only)	Displays the members (results) of the previous saved set (see **Viewing Members (Itemized Sets Only)** on page 97).
Results (logical sets only)	Runs the saved search query and displays the results (see **Viewing Results (Logical Sets Only)** on page 100).
Duplicate	Makes a copy of a set. Locate the set you want to duplicate and select **Actions > Duplicate**. The set is duplicated and added to the Manage Sets page with the words **Copy of** added as a prefix to the set name. After duplicating a set you can edit it as described in **Editing Itemized Sets** on page 91 and **Editing Logical Sets** on page 94.
Itemize	Converts a logical set to a itemized set. Locate the logical set that you want to convert to an itemized set, and select **Actions > Itemize**. Click **Confirm** in the Confirmation Message dialog box (see **Converting Logical Sets to Itemized Sets** on page 96).
Combine Sets	Creates a new set based on the members of two existing sets (see **Combining Sets** on page 103).
Create Title Set	Creates a new set of titles based on an existing itemized set.

Table 11. Actions Button Options

Actions Options	Description
Delete	Deletes a set. Locate the set that you want to delete and select **Actions > Delete**. Click **Confirm** in the Confirmation Message dialog box. **NOTE:** You can delete only logical and itemized sets that you own (created by you). However, if you have the role of Repository Manager, you can delete any set.

Adding and Modifying Sets

When you save a query, it is automatically saved as a logical set and displays in the My Sets tab on the Manage Sets page.

You can also add (create) sets directly from the Manage Sets page. The types of sets are:

- Itemized – Comprises the individual records in the repository, selected by the search operator and associated with the set (see **Adding Itemized Sets** on page 84)
- Logical – Same as a saved query, the population of which is determined by the results of the particular search associated with the set.

  Therefore, the population of the logical set is determined dynamically, reflecting the records currently in the repository. For example, if records have been added to (or deleted from) the repository since the logical set was created, these records are included in (or removed from) the logical set population the next time you run the logical set search query (see **Adding Logical Sets** on page 89).

This section describes how to add itemized sets (see **Adding Itemized Sets** on page 84), and logical sets (see **Adding Logical Sets** on page 89). It then describes how to perform the Actions button tasks.

Adding Itemized Sets

An itemized set comprises individual records in the repository selected by the search operator and associated with the itemized set.

To add an itemized set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

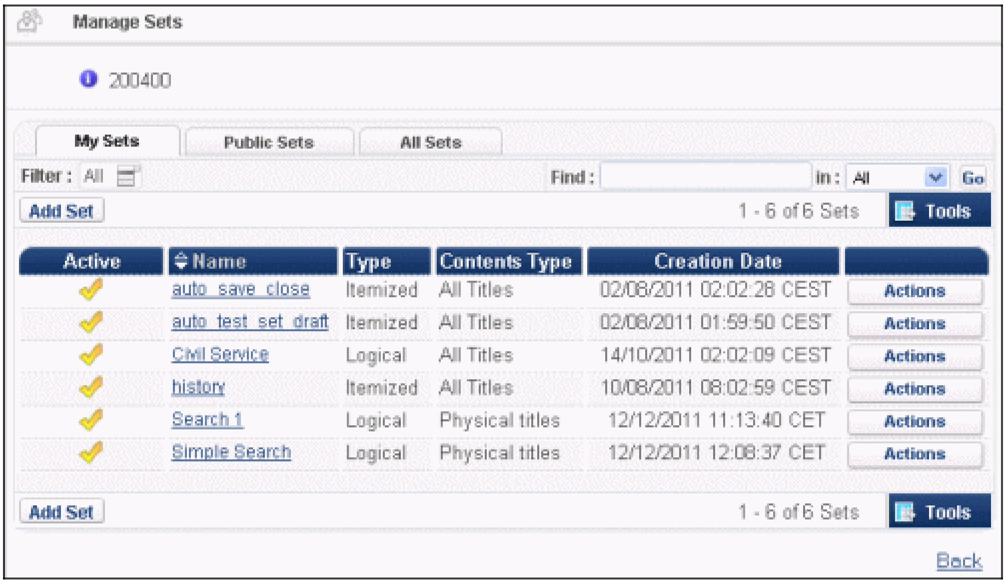


Figure 54: Manage Sets Page

2 Click **Add Set > Itemized**. The Set Details page opens.

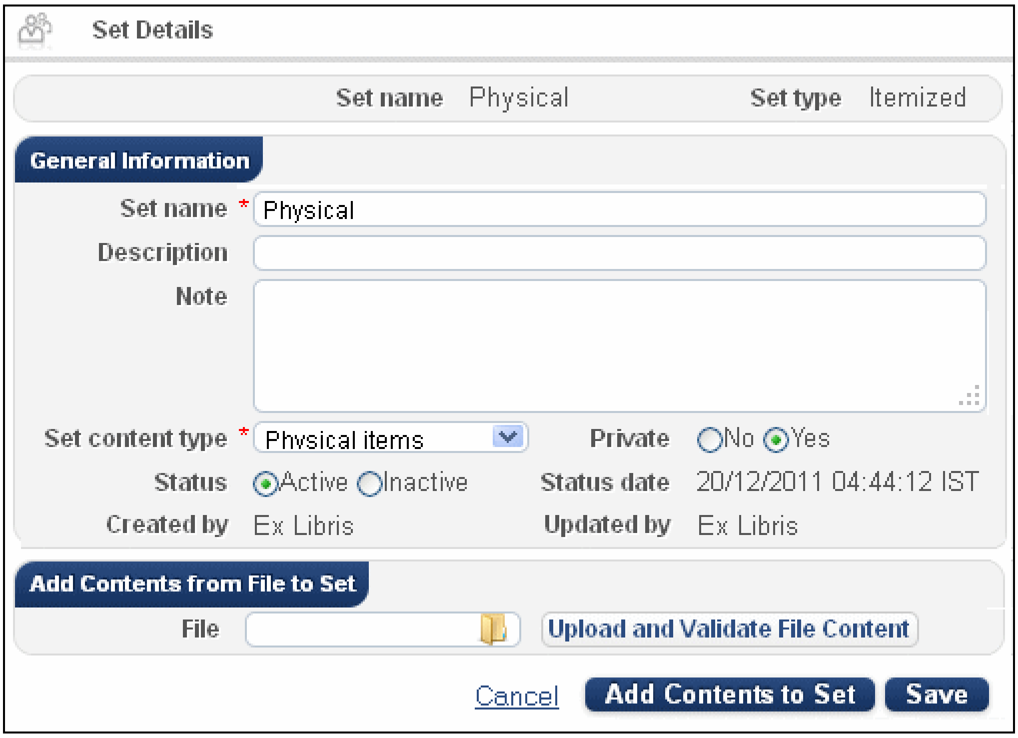


Figure 55: Set Details Page for Itemized Sets

3 Enter the set details in the respective fields. (The **Set Name** is a mandatory field and must be unique. Other fields are optional).

NOTE:
The set name cannot contain special characters (for example: &, #, $, %).

4 From the **Set Content Type** drop-down list, select the content type for the set. The options that are available are a subset of those available in the **Find** drop-down list when performing a simple or advance search. For a description of the available options see **Using the Simple Search** on page **19**.

5 If you want to add records to the set by file upload, click **Browse**, browse to the required file, and click **Upload and Validate File Content**.

The imported file must have the correct header at the top of the column for the data to be read. All other information in the Excel is disregarded. The following are the acceptable headers:

Table 12.

Content Type	Header
All Titles, Authorities	MMS ID
Physical titles, Electronic titles, Digital titles, Electronic collections, Digital files, Collections	PID
Physical items	Barcode and PID (PID, Item PID, or Item ID)
Electronic portfolios	PID (PID or Portfolio ID)
PO lines	PO line reference

The following file formats are accepted:

- Text files:
  - .txt
  - .csv
- Excel:
  - .xls
  - .xlsx

NOTES:

- The import file can contain a maximum of 5000 lines and be a maximum size of 10 MB.
- Validation is performed only for PO lines and physical items. If you perform an import with invalid data, each invalid cell is ignored.
- If you import a file and then change the content type, you must re-import the file.

6 By default, the set is designated as a **Private** (**Yes**) set. This means that the set is only available to you. If you select **No**, the set becomes a public set and is available to all other users.

7 By default, the **Status** is set to **Active**. Optionally, select **Inactive**.

8 Click **Add Contents to Set**. The Repository Search page opens.

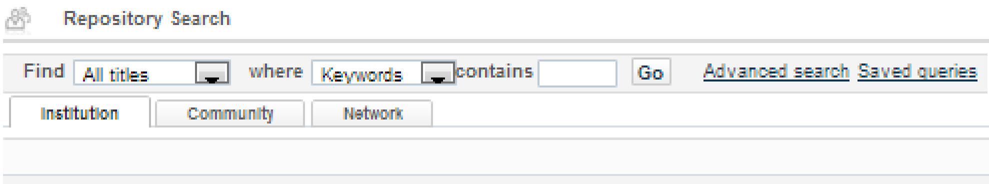


Figure 56: Repository Search Page

9 If you are not adding records to the set by file upload, search for the content you want added to the set using the simple search (see **Using the Simple Search** on page **19**) or using the advanced search (see **Using the Advanced Search** on page **20**). The Repository Search page refreshes to show the results of the search.

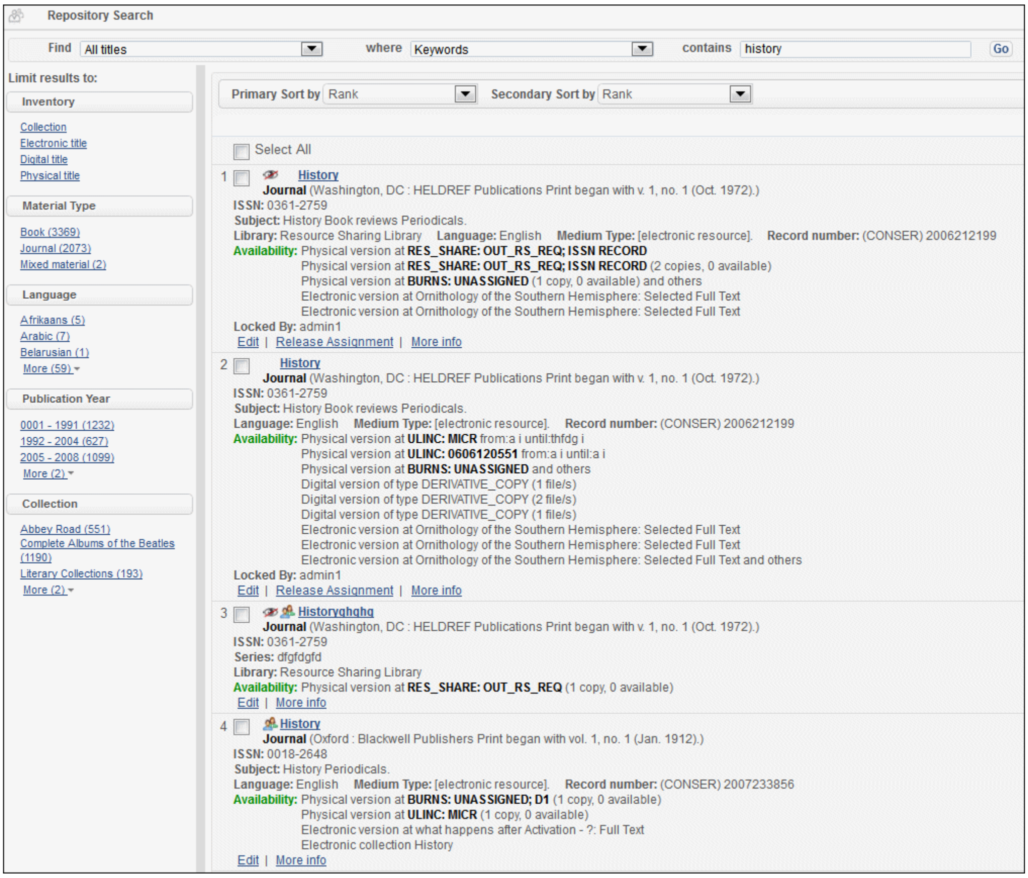


Figure 57: Repository Search Results for Itemized Sets

10 Select the items you want included in the set and click **Add Selected**. The selected records are added to the set.

You can continue searching, selecting, and adding records. When you are done, continue with the next step.

11 Click **Done**. The Manage Sets page opens with the new set added to the list of sets.

Adding Logical Sets

A logical set is the same as a saved query, and the population of the logical set is determined by the results of the particular search associated with the set. Therefore, the population of the logical set is determined dynamically reflecting the records currently in the repository. For example, if records have been added to (or deleted from) the repository since the logical set was created, these records are included in (or removed from) the logical set population the next time you run the logical set search query.

You create a logical set in basically the same way as you save a query (see **Saving Queries** on page **32**). The difference, however, is that when you create a logical set you define the set details first (as you do for an itemized set, see **Adding Itemized Sets** on page **84**).

To add a logical set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

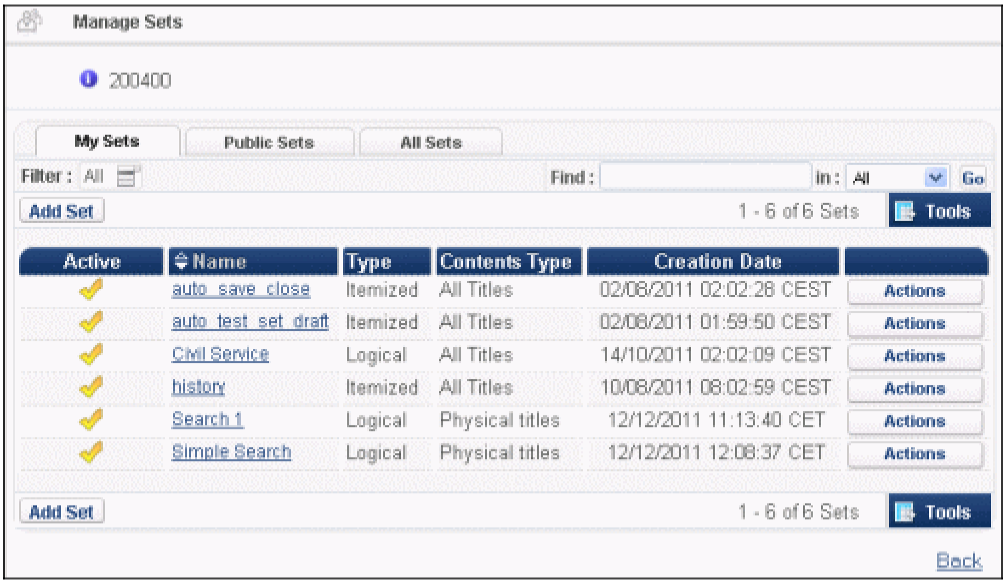


Figure 58: Manage Sets Page

2 Click **Add Set > Logical**. The Set Details page opens.

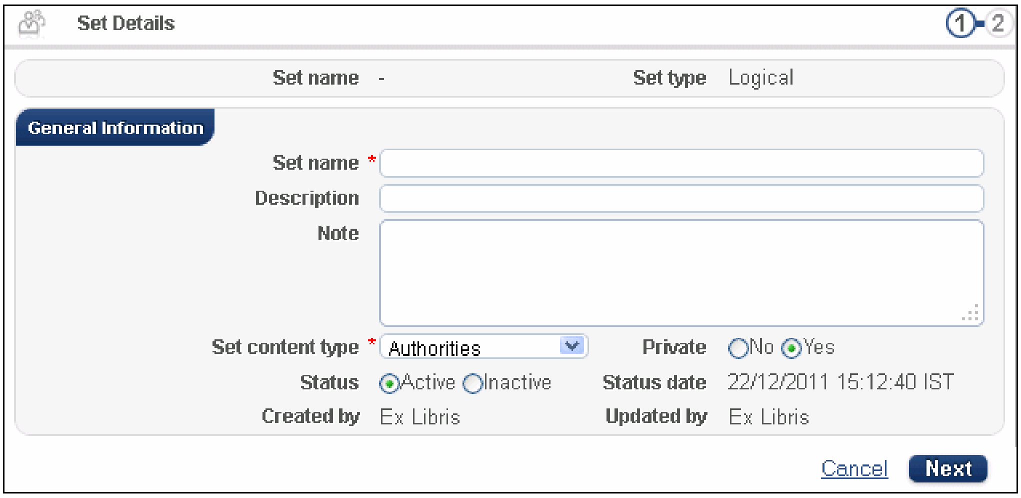


Figure 59: Set Details Page for Logical Sets

3 Enter the set details in the respective fields. (The **Set Name** is a mandatory field and must be unique. Other fields are optional).

NOTE:

The set name cannot contain special characters (for example: &, #, $, %).

---

4 From the **Set Content Type** drop-down list, select the content type for the set. The options available are the same as those available in the **Find** drop-down list when performing a simple or advance search. For a description of the available options, see **Using the Simple Search** on page **19**.

5 By default, the set is designated as a **Private** (**Yes**) set. This means that the set is only available to you. If you select **No**, the set becomes a public set and is available to all other users.

6 By default, the **Status** is set to **Active**. Optionally, select **Inactive**.

7 Click **Next**. The Repository Search page opens.

Figure 60: Repository Search Page

8 Search for the content you want added to the set using the simple search (see **Using the Simple Search** on page **19**) or using the advanced search (see **Using the Advanced Search** on page **20**). The Repository Search page refreshes to show the results of the search.

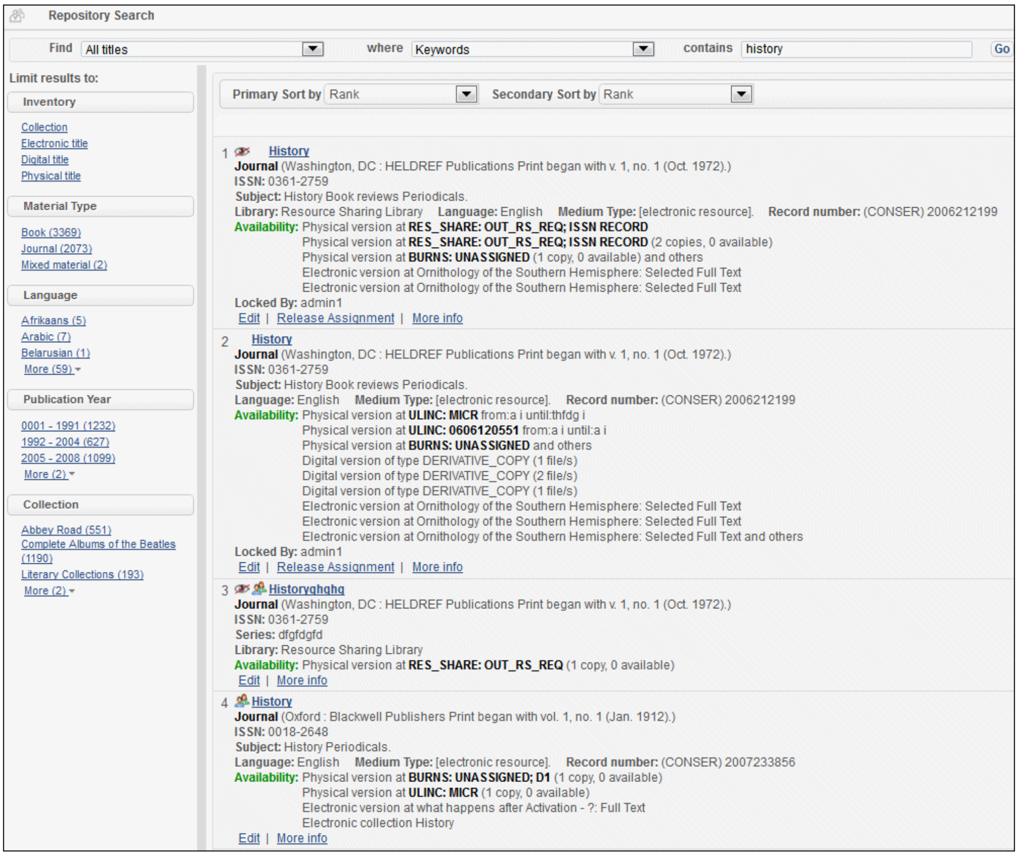


Figure 61: Repository Search Results for Logical Sets

9 Click **Save**. The logical set is saved.

Editing Itemized Sets

An itemized set comprises individual records in the repository selected by the search operator and associated with the itemized set.

Editing an itemized set enables you to not only edit the set details, but also edit the items that comprise the set.

To edit an itemized set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

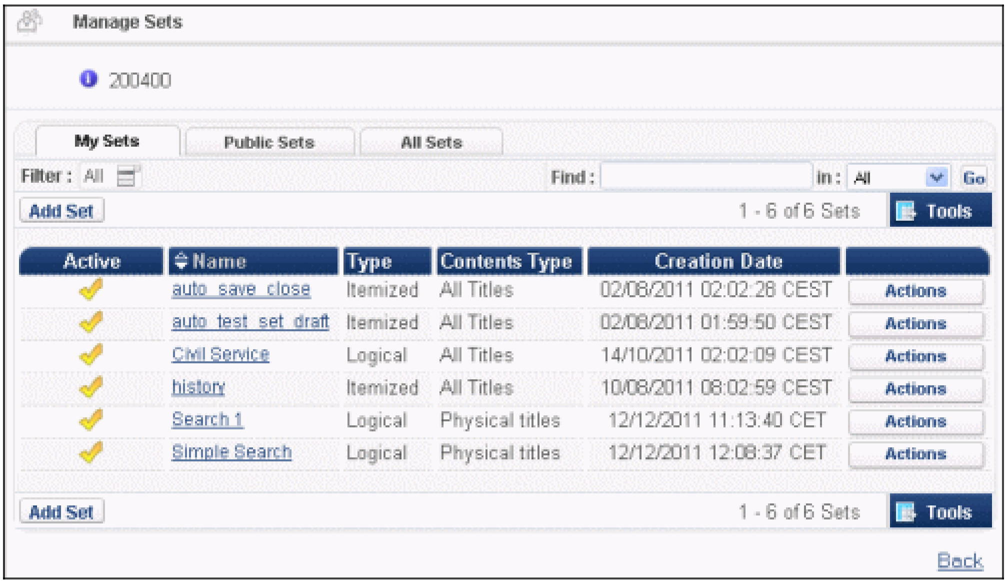


Figure 62: Manage Sets Page

2 Scroll to the itemized set you want to edit and select **Actions > Edit**. The Set Details page opens.

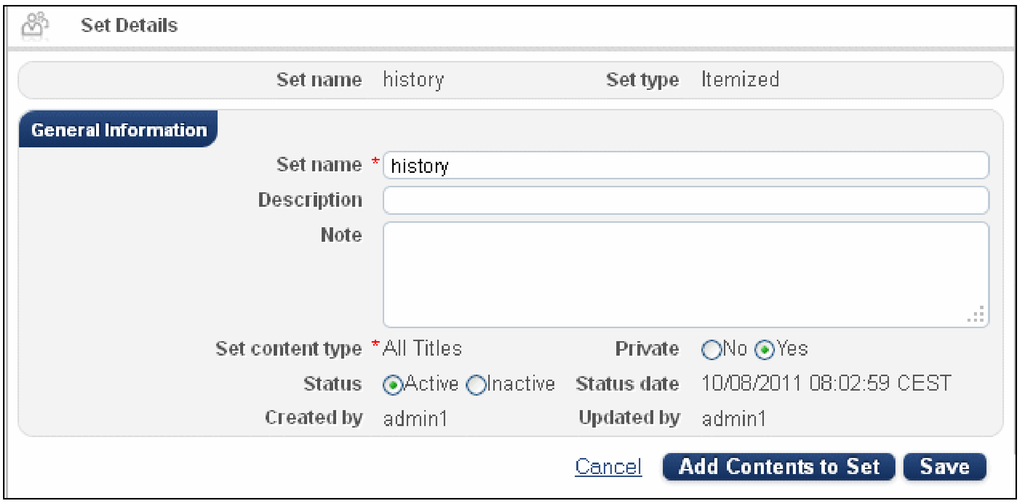


Figure 63: Set Details Page Itemized Set to Edit

3 Modify the set details as required. The **Set Name** is a mandatory field and must be unique. Other fields are optional. (See **Adding Itemized Sets** on page 84 for a description of the fields.)

NOTE:
The set name cannot contain special characters (for example: &, #, $, %).

4 If you do not want to change the items in the set, click **Save**. The Manage Sets page opens indicating that the set has been successfully saved.

5 If you want to add items to the itemized set, click **Add Contents to Set**. The Repository Search Page opens.

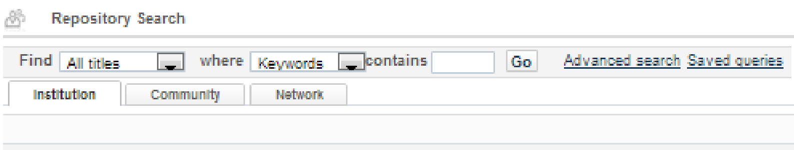


Figure 64: Repository Search Page

6 Search for the content you want added to the set using the simple search (see **Using the Simple Search** on page 19) or using the advanced search (see **Using the Advanced Search** on page 20). The Repository Search page refreshes to show the results of the search.

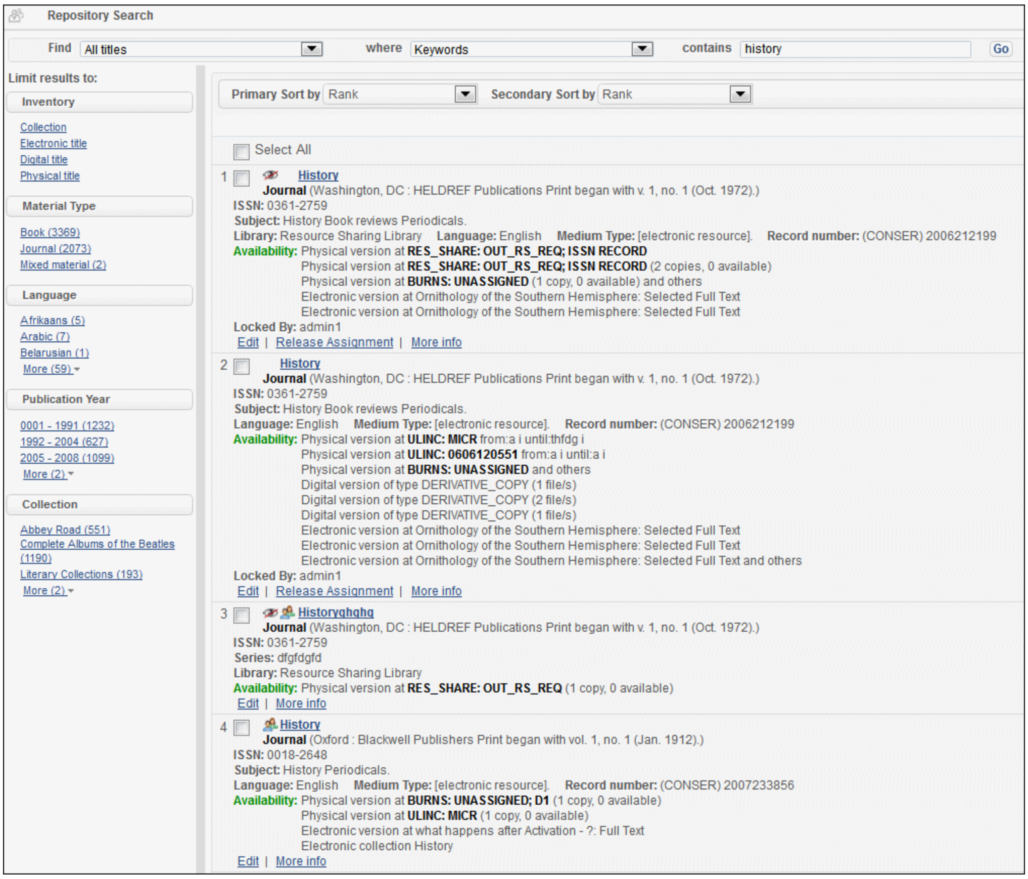


Figure 65: Repository Search Results for Itemized Sets

7 Select the items you want included in the set (or click **Select All**) and click **Add Selected**. The selected records are added to the set.

You can continue searching, selecting, and adding records. When you are done, continue with the next step.

8 Click **Done**. The Manage Sets page opens indicating that the set has been successfully saved.

NOTE:
You can also delete items from the itemized set as described in **Viewing Members (Itemized Sets Only)** on page **97**.

Editing Logical Sets

The population of a logical set is determined dynamically, reflecting the records currently in the repository. As a result, when you use this function to edit a logical set, you only edit the set details. For details on how to change the set contents see **Viewing Results (Logical Sets Only)** on page **100**.

To edit a logical set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

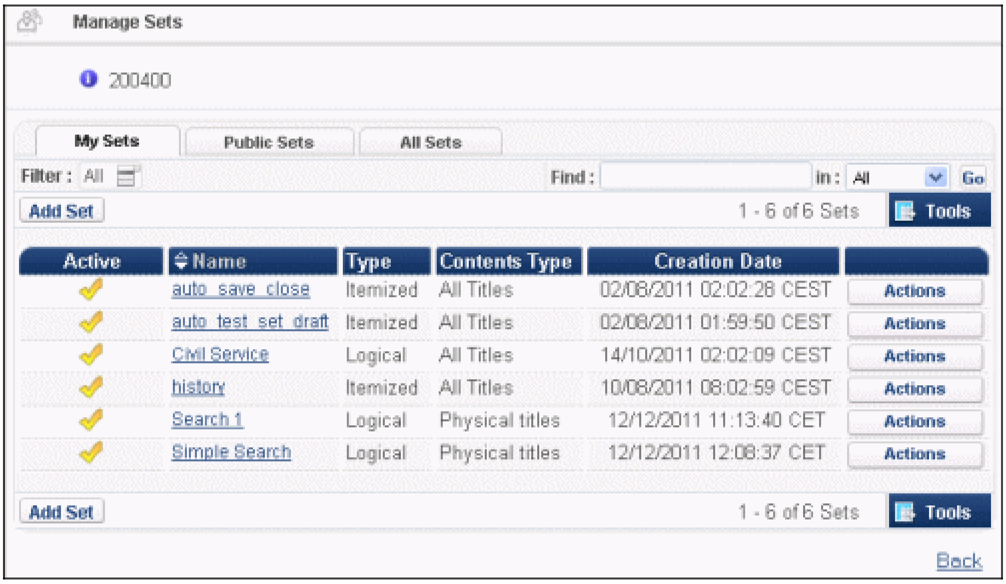


Figure 66: Manage Sets Page

2 Scroll to the logical set you want to edit and select **Actions > Edit**. The Set Details page opens.

Figure 67: Set Details Page Logical Set to Edit

3 Modify the set details as required. The **Set Name** is a mandatory field and must be unique. Other fields are optional. (see **Adding Logical Sets** on page 89 for a description of the fields.)

4 Click **Save**. The Manage Sets page opens indicating that the set has been successfully saved.

Converting Logical Sets to Itemized Sets

You can convert a logical set to an itemized set. This creates a fixed itemized set based of the criteria of an existing logical set.

To convert a logical set to an itemized set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

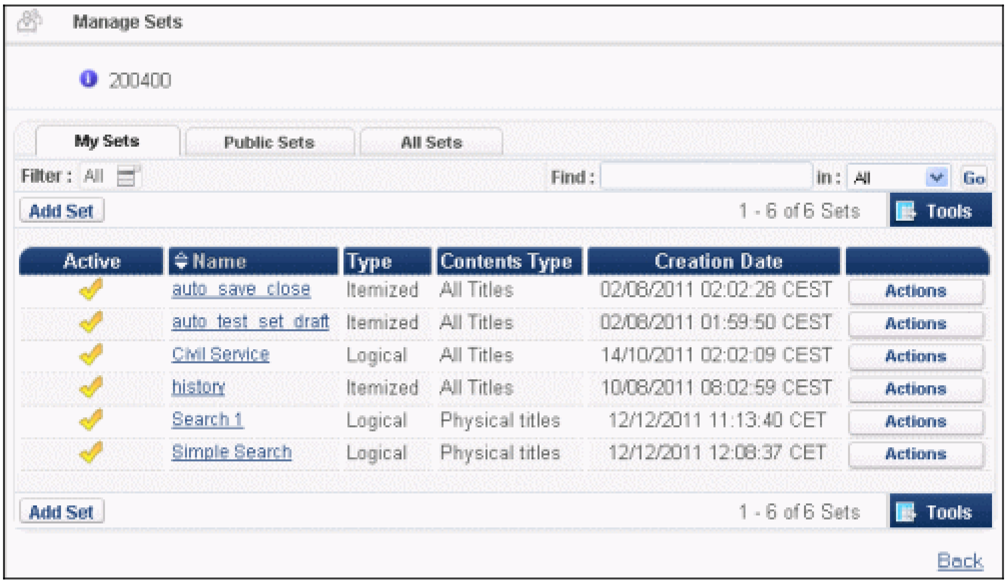


Figure 68: Manage Sets Page

2 Scroll to the logical set that you want to convert to an itemized set and select **Actions > Itemize**. The Set Details page opens with the set name filled in:

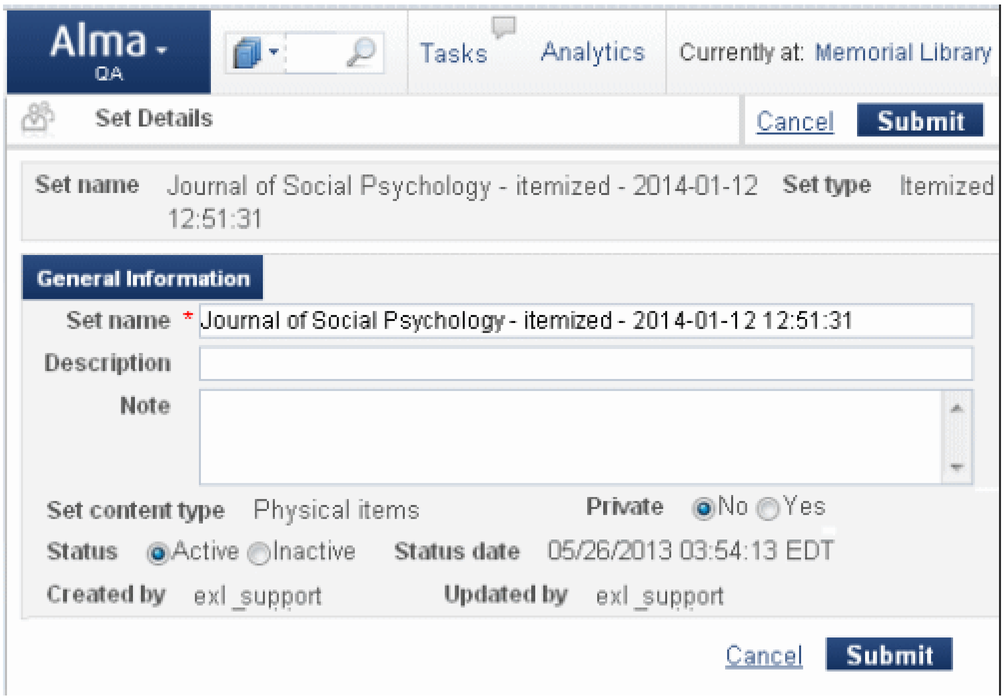


Figure 69: Set Details Page Convert Logical Set to Itemized Set

3 Modify the set details as required. See **Adding Itemized Sets** on page 84 for a description of the fields.

4 Click **Submit**. A confirmation message opens.

5 Click **Confirm**. The Manage Sets page opens indicating that the set has been successfully saved.

Viewing Members (Itemized Sets Only)

The Members option enables you to view, add, or remove members (selected items from the results of a repository search) in an itemized set.

To view members of an itemized set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

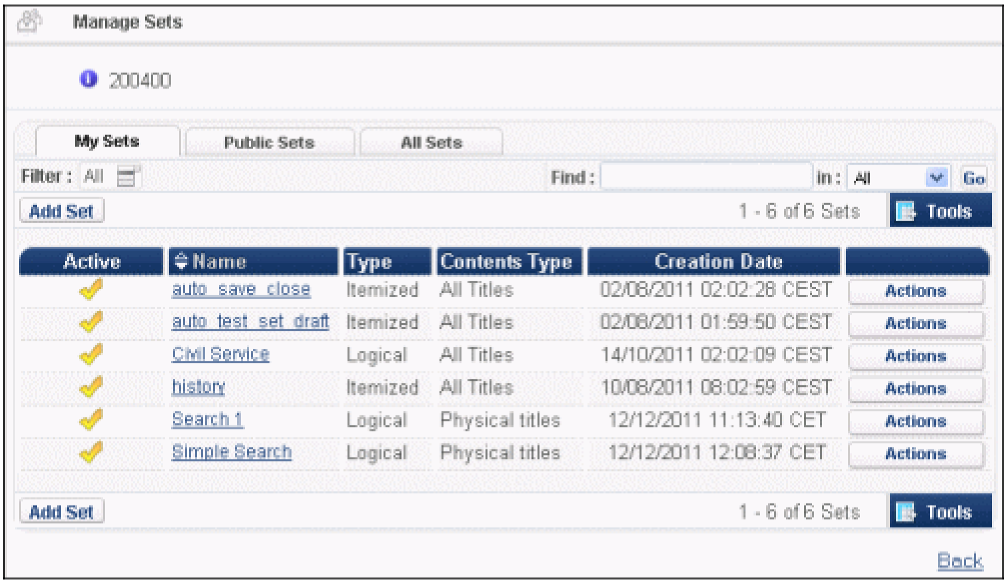


Figure 70: Manage Sets Page

2 Scroll to the itemized set whose members you want to view and select **Actions > Members**. The Repository Search page opens.

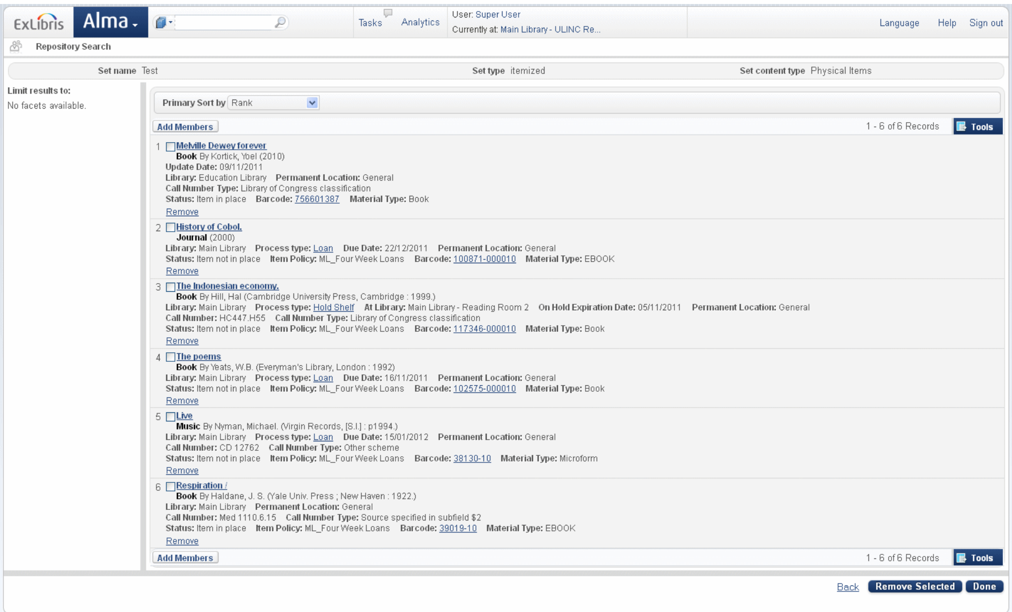


Figure 71: Repository Search Members

3 To remove a member from the set, click the **Remove** link. The member is removed from the list of members of the set.

NOTE:
This action only removes the member from the list of members of the set. It does not delete the member from the set. The member is only deleted from the set when you click **Done** (step **6**). Therefore, if you want to recover a removed member before you click **Done**, click **Back** to go back to the Manage Sets page and start over.

4 To remove multiple members from the set, select the members you want to remove and click **Remove Selected**. The selected members are removed from the list of members of the set.

NOTE:
This action only removes the members from the list of members of the set. It does not delete the members from the set. The members are only deleted from the set when you click **Done** (step **6**). Therefore, if you want to recover removed members before you click **Done**, click **Back** to go back to the Manage Sets page and start over.

5 To add members to the set, click **Add Members**. The Repository Search page opens.

Figure 72: Repository Search Page

a Search for the content you want added to the set using the simple search (see **Using the Simple Search** on page **19**) or using the advanced search (see **Using the Advanced Search** on page **20**). The Repository Search page refreshes to show the results of the search.

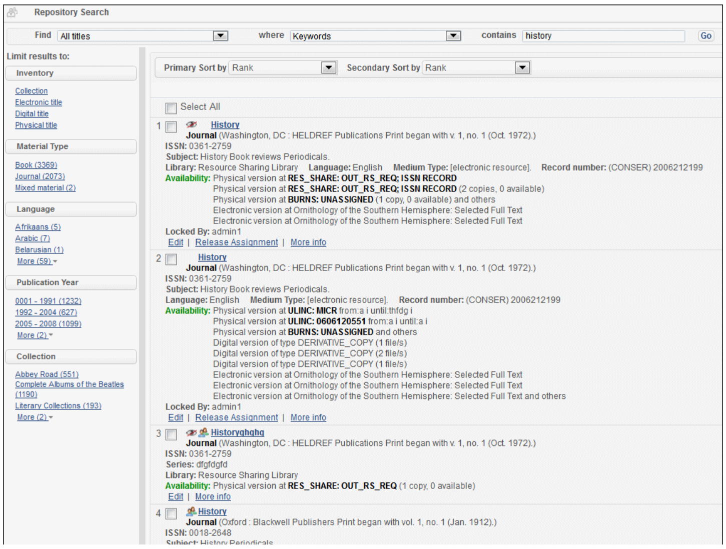


Figure 73: Repository Search Results for Itemized Sets

b Select the items you want added to the set, click **Add Selected**, and click **Done**. The Manage Sets page opens indicating that the set has been successfully saved.

6 Click **Done**. The members are finally removed from the set and the Manage Sets page opens.

Viewing Results (Logical Sets Only)

The Results option enables you to view the results of a logical set. The population of a logical set is determined dynamically, reflecting the records currently in the repository. Therefore, the results of a logical set always reflect the current state of items in the repository even though the set may have been created in the past.

To view results of a logical set:

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

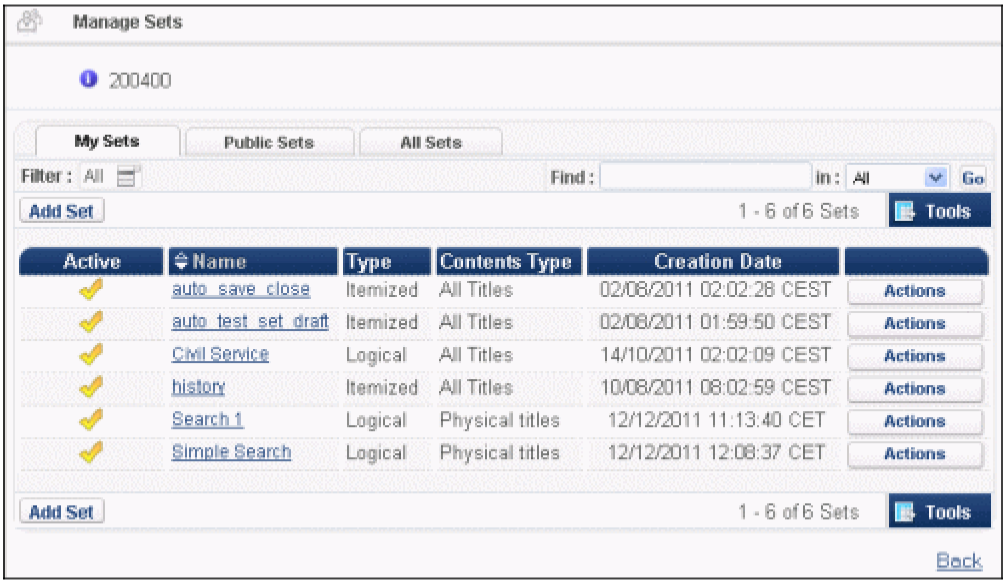


Figure 74: Manage Sets Page

2 Scroll to the logical set whose results you want to view and select **Actions > Results**. The Repository Search Results page opens.

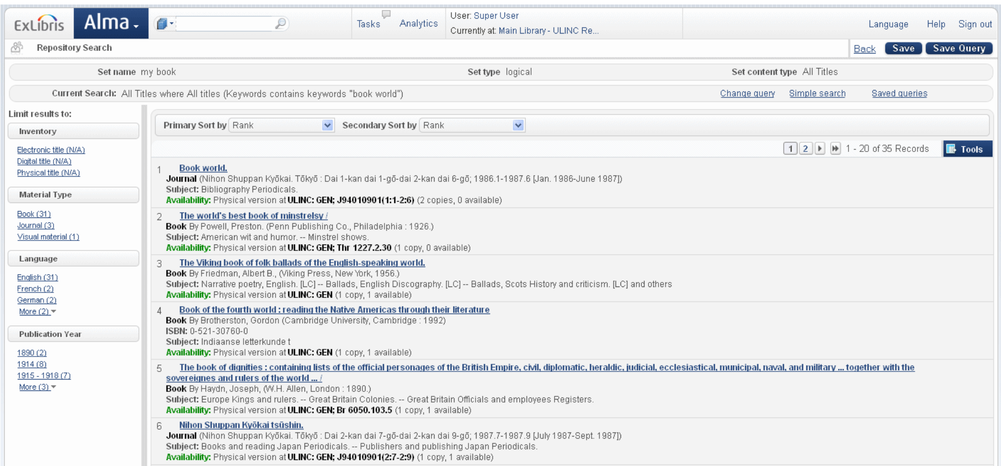


Figure 75: Repository Search Results of Logical Set

3 Click **Change Query** to modify the search criteria according to the way the initial set was created (see **Using the Simple Search** on page **19** or **Using the Advanced Search** on page **20**). The following is an example of the Advanced Search page after clicking **Change Query**.

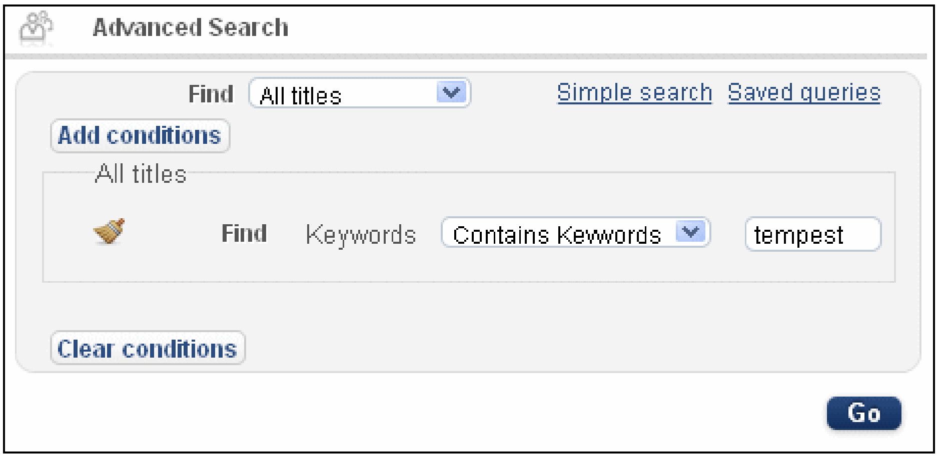


Figure 76: Change Advanced Search Page

4 Modify the search criteria and click **Go**. The Repository Search page opens showing the results of the new search as shown in the following example.

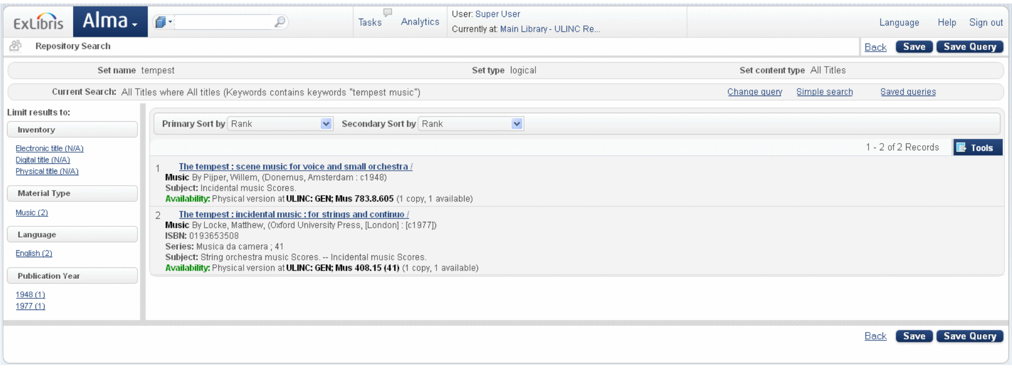


Figure 77: Example of Results of New Search

5 To save the set and overwrite the existing set, click **Save**. The Manage Sets page opens indicating that the set has been successfully saved.

6 To save the set as a new query, click **Save Query**. The Set Details page opens.

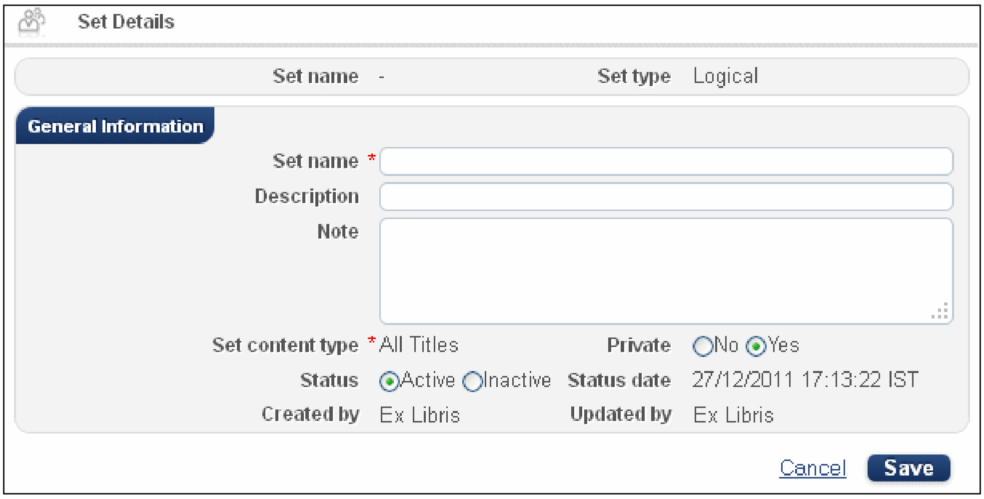


Figure 78: Set Details Page for Logical Set

a. Enter the set details in the respective fields. The **Set Name** is a mandatory field and must be unique. Other fields are optional.

   The **Set Content Type** takes on the same value as the original set.

b. By default, the set is designated as a **Private** (**Yes**) set. This means that the set is only available to you. If you select **No**, the set becomes a public set and is available to all other users.

c. By default, the **Status** is set to **Active**. Optionally, select **Inactive**.

d. Click **Save**. The Manage Sets page opens indicating that the set has been successfully saved.

Combining Sets

You can create a new set based on the members of two existing sets. The combined set is an itemized set.

VIDEO:

For more information on Combining Sets, see the *Combine Two Sets of Items* video (3:42 mins).

---

1 Select **Search and Sets > Manage Sets** from the Resource Management menu. The Manage Sets page opens.

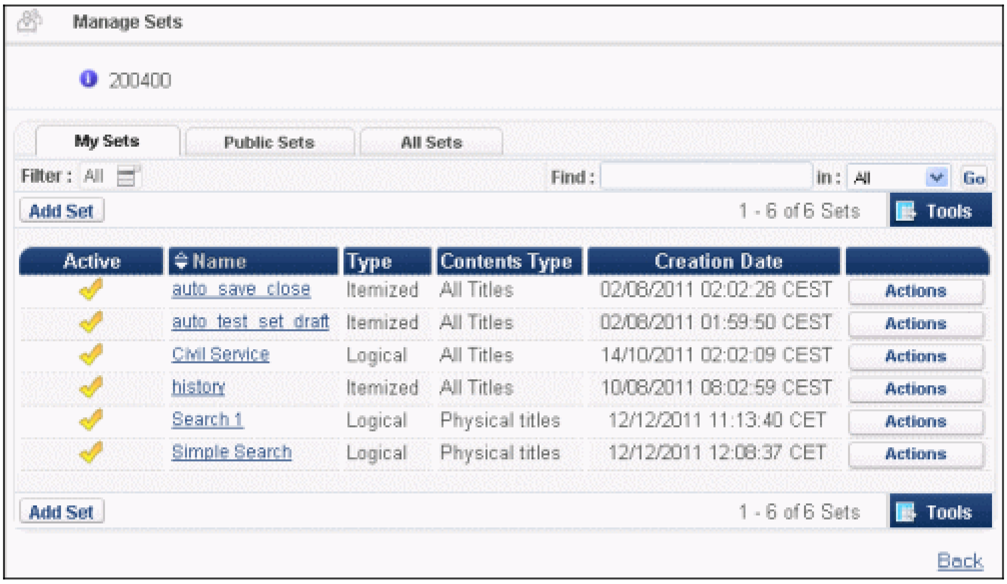


Figure 79: Manage Sets Page

2 Scroll to the set whose members you want to combine with another set and select **Actions > Combine Sets**. The Set Details page opens with the Combine Sets section:

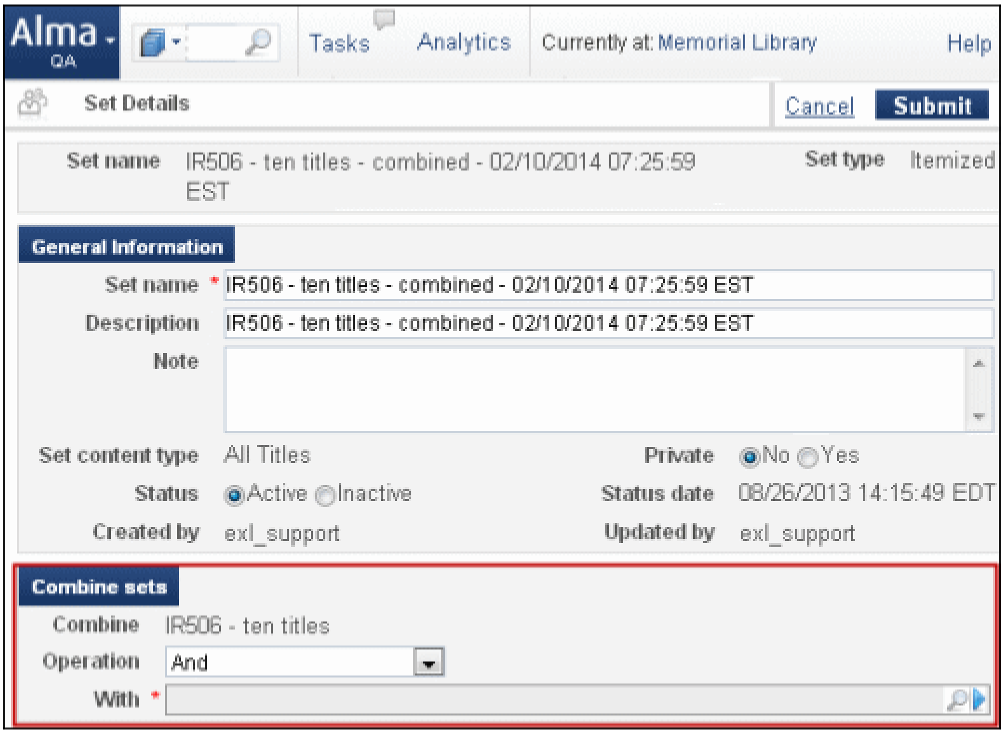


Figure 80: Set Details

3 Select an Operation from the Operation drop-down list:

- And – Include only the members in common between the two sets in the new combined set.
- Not – Include only the members that are in the first set and not in the second set in the new combined set.
- Or – Include all of the members in both of the sets in the new combined set.

4 Click  from the **With** field to display the Set Details page.

5 Select the set that you want to combine with the first set you selected.

6 Click **Submit**. The following message is displayed indicating the number of members in each set you selected to combine, the operation you selected, and the number of members in the combined set:

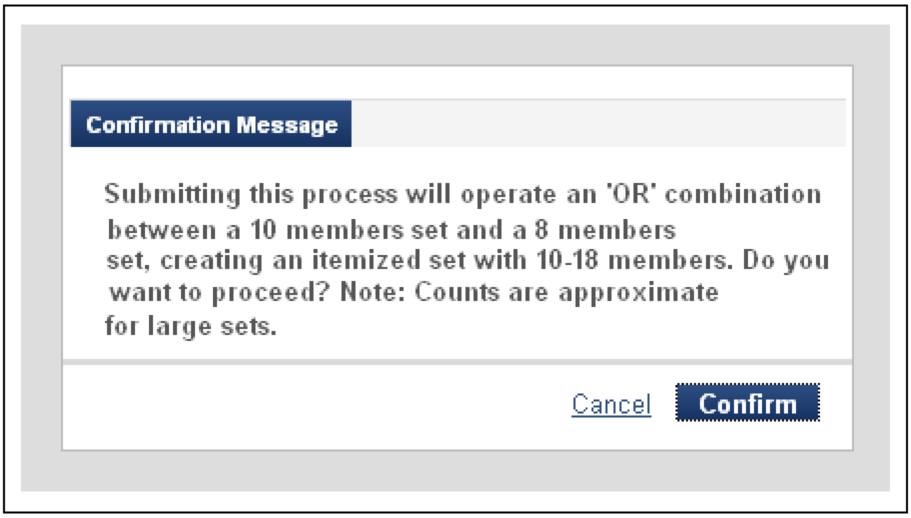


Figure 81: Confirmation Message

NOTE:

The confirmation message contains a range of members, since some members between the two sets may be identical and are therefore only included once in the combined set.

7 Click **Confirm**.

A job is run to combine the sets. The following message is displayed:

After the job finishes, the new set is added to the list of sets. (You must refresh the list to see the new set):

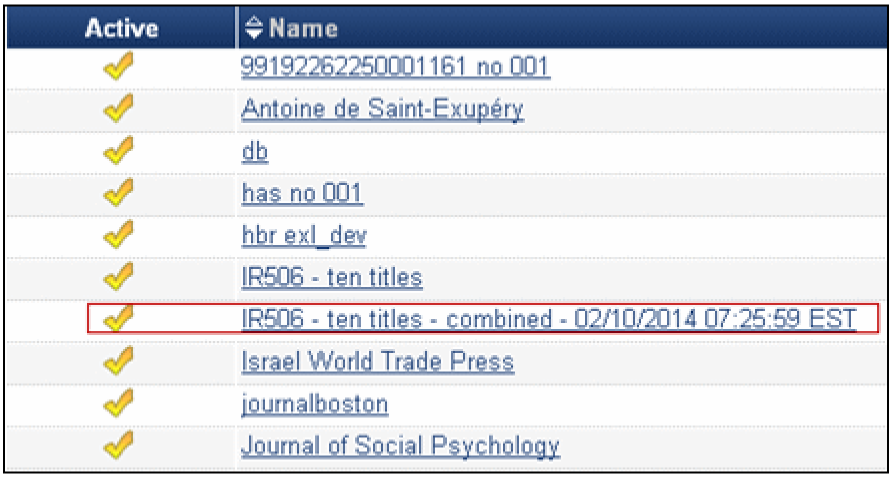


Figure 82: Combined Set

Creating Title Sets

You can create title sets from itemized sets of physical items, electronic portfolios, or digital files. The new set contains the titles of the items in the original set.

NOTE:

If you want to create title sets from a logical set, you must first convert the set from a logical to an itemized set type.

To create title sets:

1. From the Manage Sets page (**Resource Management > Search and Sets > Manage Sets)**, select **Actions > Create title set** for an itemized set of physical items, electronic portfolios, or digital files.

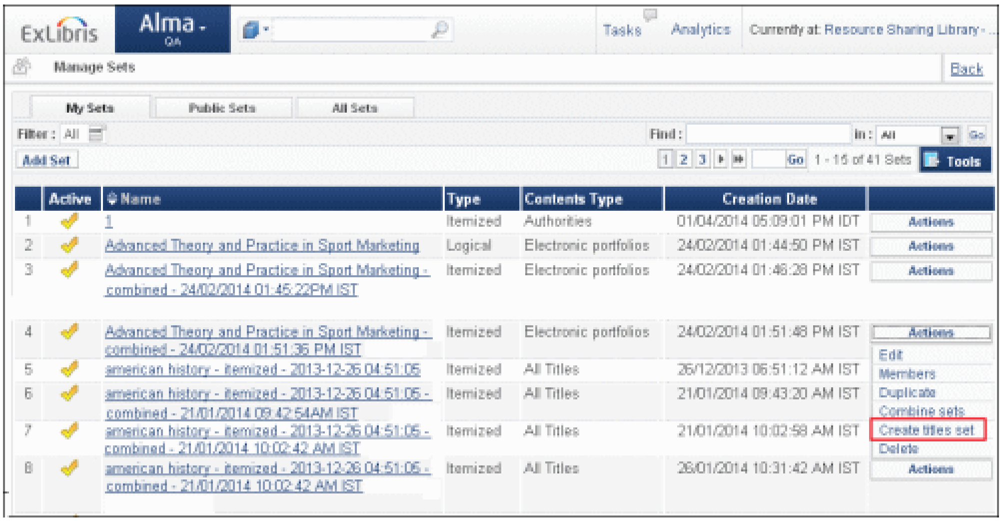


Figure 83: Create Title Set

The Set Details page opens with information concerning the new title set-such as the date and time that the set was created-added to the set name.

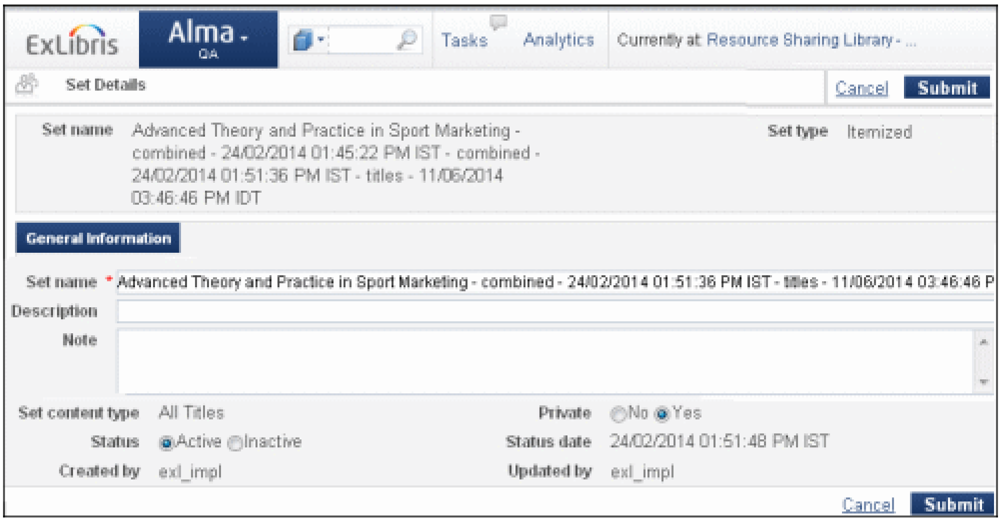


Figure 84: Set Details Page

2. Fill in the **Description** and **Note** fields (optional) and click **Submit**. A confirmation message such as the following is displayed.

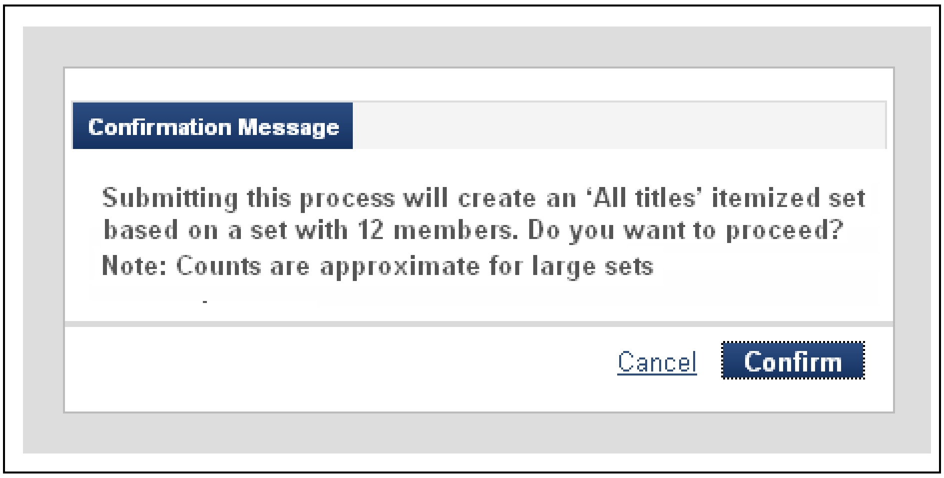


Figure 85: Confirmation Message

3 Click **Confirm**. The job runs and creates the title set. When the job is finished, the new set is displayed in the list of sets.

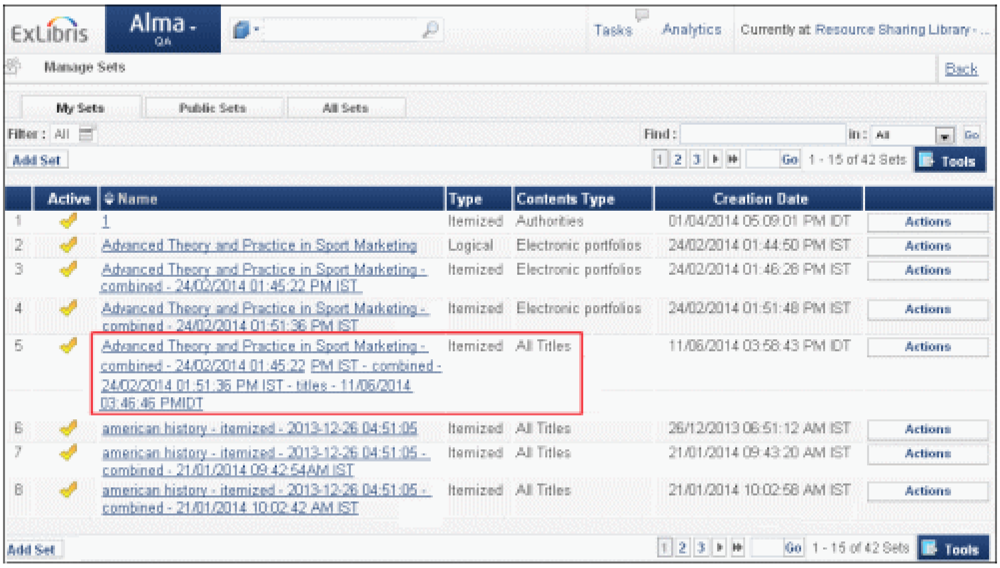


Figure 86: New Titles Set

Viewing Export Processes

PERMISSIONS:

Any user can view processes.

The Exported Processes page enables you to view details of all the export processes that you have created and marked as Private, as well as the export processes created by you or other users that are marked as Institution. Export processes marked as Private are only available to you. Whereas, export processes marked as Institution are available to any user.

NOTE:
You can only view export processes in the current version of Alma.

To view export processes:

1 Select **Search and Sets > Manage Exports** from the **Resource Management** menu. The Exported Processes page opens.

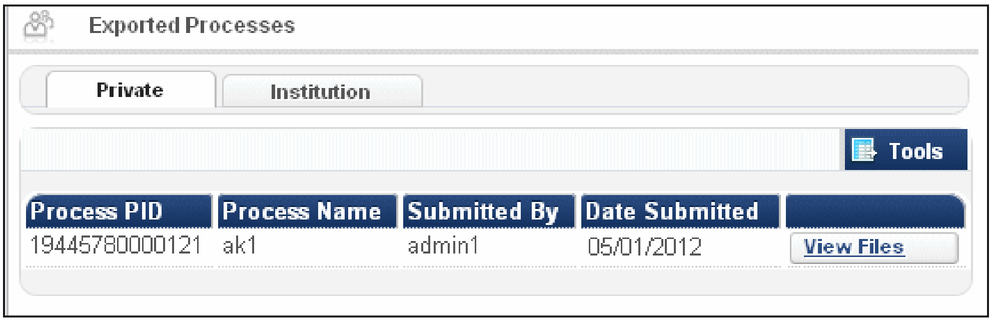


Figure 87: Exported Process Page

The Exported Processes page lists export processes created in the following tabs:

- Private – Export processes created by you that are for your use only. Other users cannot see or use these export processes.
- Institution – Export processes created by any user that can be seen and used by any user.

2 To view details of an exported file, click **View Files**. The Exported Files page opens.

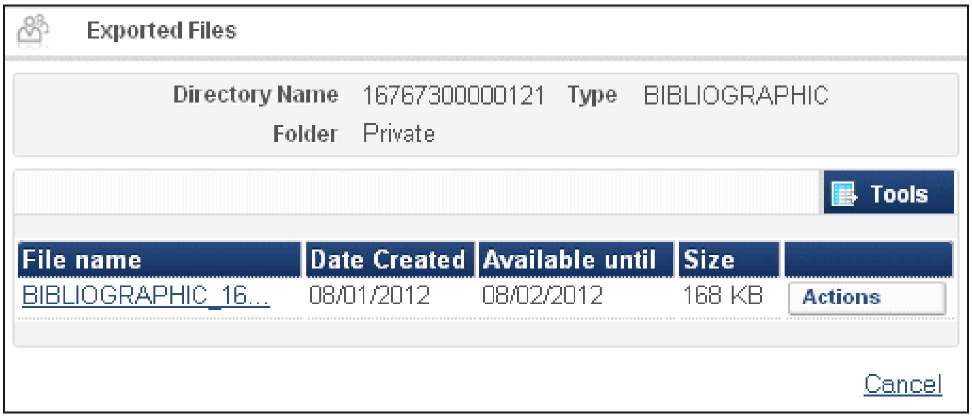


Figure 88: Exported Files Page

The Exported Files page, lists details of the exported file and includes an Actions button that enables you to:

- Delete – Deletes the exported file (see **Deleting Exported Files** on page **111**)
- Download – Downloads the exported file (see **Downloading Exported Files** on page **112**)

Deleting Exported Files

When you delete an exported file from a process, you only delete the file from the process. The process itself remains.

To delete an exported file:

1 Select **Search and Sets > Manage Exports** from the **Resource Management** menu. The Exported Processes page opens.

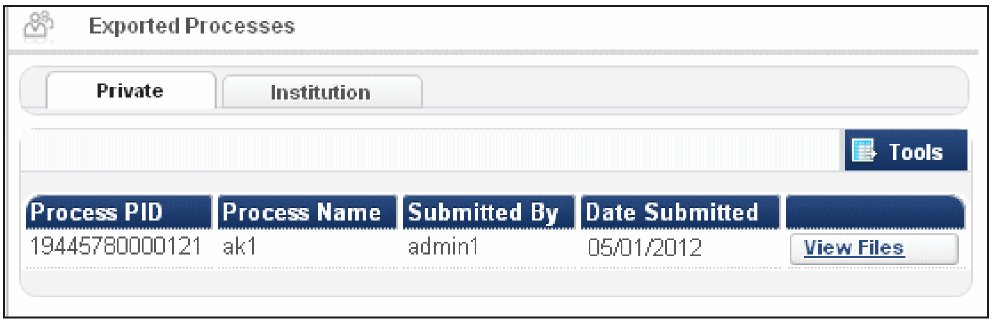


Figure 89: Exported Process Page

2 Locate the export process whose export file you want to delete, and click **View Files**. The Exported Files page opens.

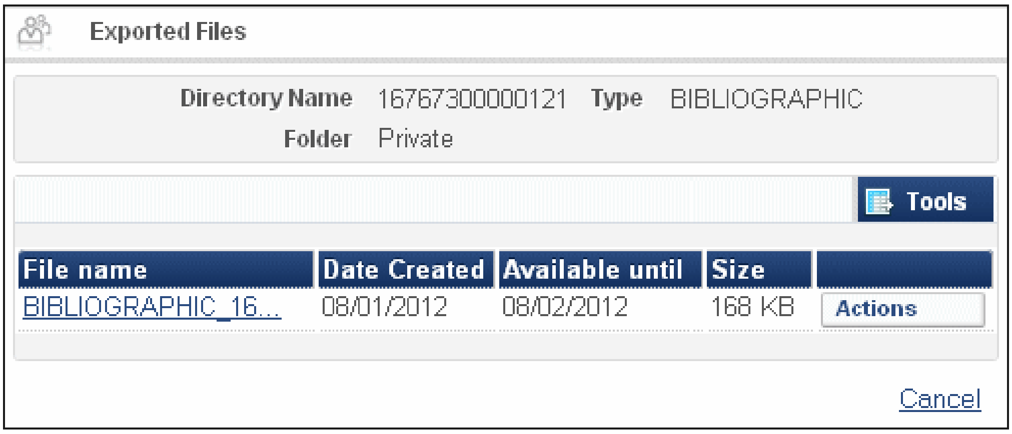


Figure 90: Exported Files Page

3 Select **Actions > Delete**. The following confirmation message dialog box opens.

Figure 91: Delete Exported File Confirmation Message Dialog Box

4 Click **Confirm**. The exported file is deleted from the process.

Downloading Exported Files

You can download an exported file to your local computer.

To download an exported file:

1 Select **Search and Sets > Manage Exports** from the **Resource Management** menu. The Exported Processes page opens.

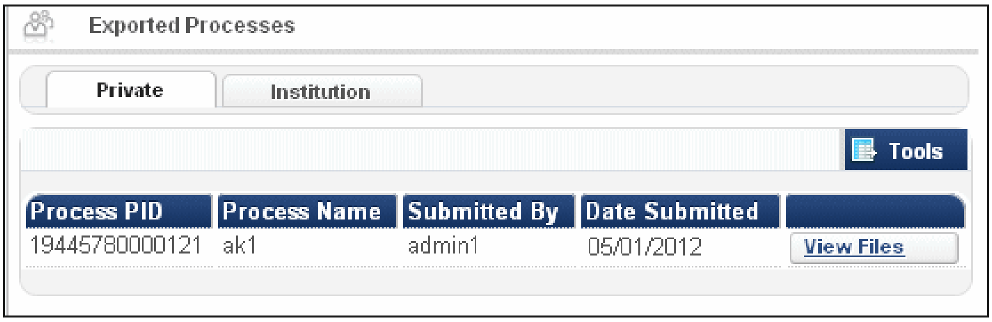


Figure 92: Exported Process Page

2 Locate the export process whose export file you want to download, and click **View Files**. The Exported Files page opens.

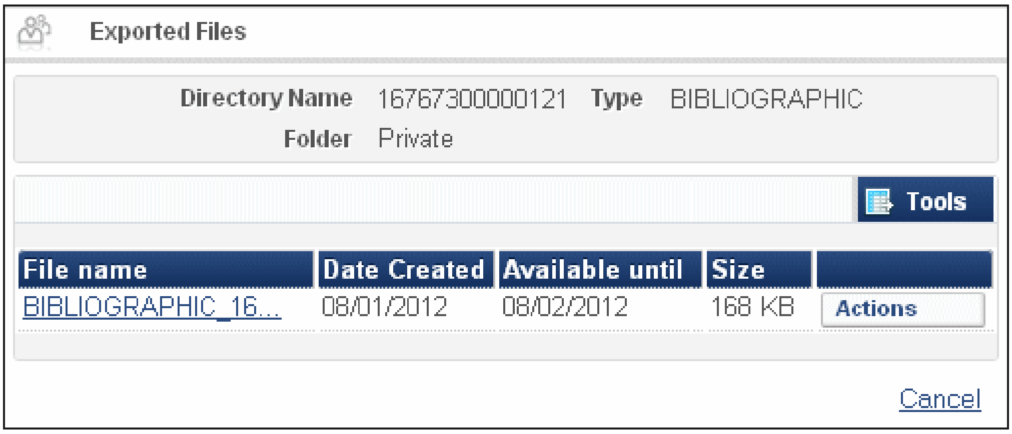


Figure 93: Exported Files Page

3 Select **Actions > Download**, or click the **File Name** link. The Opening File dialog box opens.

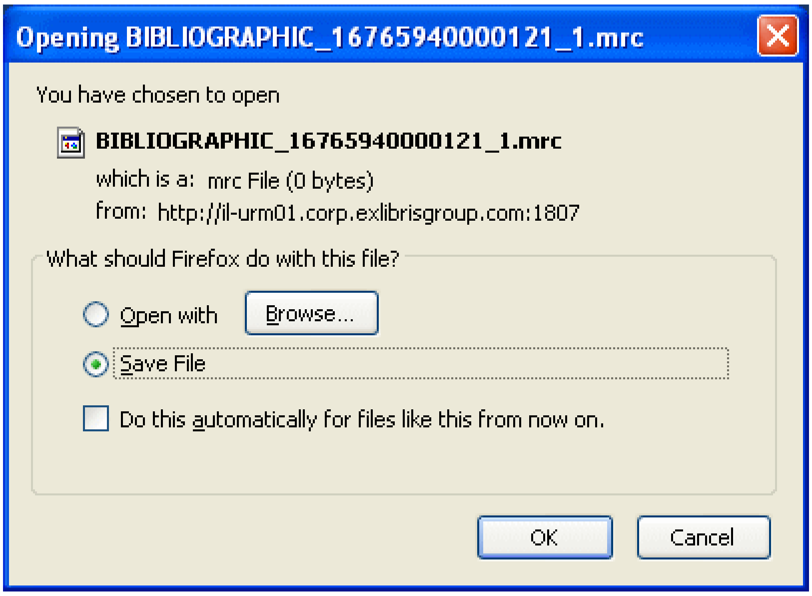


Figure 94: Opening File Dialog Box

4 Select the required options and click **OK**. The exported XML file is downloaded and opens.


```
  <?xml version="1.0" encoding="UTF-8" ?>
- <collection>
  - <record>
      <leader>08825cas a2201357 a 4500</leader>
      <controlfield tag="001">991102060000121</controlfield>
      <controlfield tag="005">20100216072057.0</controlfield>
      <controlfield tag="007">t|</controlfield>
      <controlfield tag="008">750812c19669999ne wr p 0 a0eng c</controlfield>
    - <datafield tag="010" ind1="" ind2="">
        <subfield code="a">68005703</subfield>
      </datafield>
    - <datafield tag="012" ind1="" ind2="">
        <subfield code="a">-3-7-1002154005-p-----</subfield>
      </datafield>
    - <datafield tag="016" ind1="7" ind2="">
        <subfield code="a">0045503</subfield>
        <subfield code="2">DNLM</subfield>
      </datafield>
    - <datafield tag="016" ind1="7" ind2="">
        <subfield code="a">B33180000</subfield>
        <subfield code="z">B33215000</subfield>
        <subfield code="z">D07975000</subfield>
        <subfield code="z">B33210000</subfield>
        <subfield code="z">I00920010</subfield>
        <subfield code="z">D07970000</subfield>
        <subfield code="2">DNLM</subfield>
      </datafield>
```


Figure 95: Exported XML File

NOTE:
The above figure is a sample of the first lines of the exported XML file. The full XML file may be several pages long.

Search Indexes

This section describes the MARC bibliographic tags and the search indexes to which they are mapped.

All Titles

The following table displays the MARC bibliographic tags and the search indexes to which they are mapped that are available when performing an All Titles search.

NOTE:
You can create additional search indexes (for example, for local fields). For detailed information, see **Configuring Search Indexes** on page **615**.

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
Based on LDR 6-7	Material Type
001 (MMS ID)	MMS ID
004	Source Record ID
007	Physical Description
008 06	Date Type Status
008 07-10	Additional Publication Year
008 11-14	Additional Publication Year
008 15-17	Country of Publication
008 35-37	Language
010 a,z	LC Control Number
010 a,b,z	Standard Number
015 a,z,2	National Bibliography Number
015 a,z	Standard Number
016 a,z	Standard Number

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
019 a,z	Other System Number
020 a,z	ISBN
020 a,z	Standard Number
022 a,l,m,y,z	Standard Number
022 a,y,z	ISSN
022 l m	ISSN Link
024 a,z	Standard Number
024 a,z (if indicator 2 = 2)	Other Standard ID
024_8	Other Standard ID
027 a,z	Standard Number
028 a	Publisher Number
028 a	Standard Number
030 a,z	Standard Number
031 d,t	Title
033	Event Date
035 a,z	Other System Number
037 a	Standard Number
041 a,b,d,e,f,g,j	Language
043 a,b,c	Geographic Area Code
044 a,c	Country of Publication
050 a	LC Call Number
055 a (if indicator 2 = 0-5)	LC Call Number
074 a,z	Government Document Number
080 a	Universal Decimal Class Number
082 a	Dewey Decimal Class Number
084 a	Other Classification Number
086 a,z	Government Document Number
088 a,z	Standard Number
09x	Local Call Numbers

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
090 a	LC Call Number
092 a	Dewey Decimal Class Number
096 a,z	Government Document Number
100 a-d,g,j,q,u	Name
100 a-d,j,q,u	Creator
100 e,4	Relator
110 a-e,g,n,u	Name
110 a-e,n,u	Creator
111 a,c,d,e,g,n,q,u	Name
111 a,c-e,n,q,u	Creator
130 a,d,f,g,k-p,r-t	Uniform Title
130 a,d,g,k,l,m-p,r-t	Title
210 a	Title
214 a	Title
222 a,b	Serial Title
222 a,b	Title
240 a,d,f,g,k-p,r,s	Title
240 a,d,f,g,k-p,r,s	Uniform Title
242 a,b,n,p	Title
243 a,d,f,g,k,l-p,r,s	Title
243 a,d,f,g,k-p,r,s	Uniform Title
245 a,b,k,n,p	Title
245 c	Names
245 h	Medium Type
246 a,b,n,p	Title
247 a,b,n,p	Title
250 a,b	Edition
260 a,e	Publisher Location
260 b,f	Publisher

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
260 c	Publication Year
260 g	Additional Publication Year
261 a,b,e	Publisher
261 f	Publisher Location
262 a	Publisher Location
262 b	Publisher
264 a	Publisher Location
264 b	Publisher
264 c	Additional Publication Year
336 a	Content Type Term
336 b	Content Type Code
337 a	Media Type Term
337 b	Media Type Code
338 a	Carrier Type Term
338 b	Carrier Type Code
400 a-d,g	Name
400 a-d,g,k,p,n,t,v,x	Series
400 a,k,n,p,t	Title
410 a-d,g	Name
410 a-d,g,k,p,n,t,v,x	Series
410 a,k,n,p,t	Title
411 a,c,d,e,q,k,n,p,t,v,x	Series
411 a,c-e,g,q	Name
411 k,n,p,t	Title
440 a,n,p	Title
440 a,n,p,v,x	Series
490 a	Title
490 a,v,x	Series
490 x	Standard Number

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
500 a,3,5,6,8	Public Note
501 a	Notes
502 a-d,g,o	Notes
502 c	Publisher
504 a	Notes
505 a,g,r,t	Description
505 r	Name
505 t	Title
508 a	Name
508 a	Notes
510 a,c	Notes
511 a	Name
511 a	Notes
518 strip numeric subfields	Notes
520 a,b	Description
521 a	Notes
522 a	Notes
526 a	Notes
530 a	Additional Physical Form Available Note
533 a-f,n	Notes
533 b	Publisher Location
533 c	Publisher
533 f	Series
534 a-c,e-f,k-p,t	Notes
534 f	Series
534 o,x,z	Standard Number
536 a-h	Notes
538 a	Notes

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
541 a,c,d,e	Notes
542 g,l,n	Copyright Note
545 a,b	Notes
550 a	Name
550 a	Notes
561 a	Notes
561 a	Ownership and Custodial History
562 a,b,c,d,e	Notes
563 a	Notes
586 a	Notes
59x	Local Notes
600 a-d,f,g,j-v,x-z	Subjects (LC)
600 a-d,f,g,j-v,x-z	Subjects
600 a-d,g,j,q,u	Name
600 v	Genre Form
610 a-e,g,u	Name
610 a-g,j-v,x-z	Subjects
610 a-g,j,l-v,x-z (if indicator 2 = 0)	Subjects (LC)
610 v	Genre Form
611 a,c-e,g,n,q,u	Name
611 a,c-g,j-l,n,p,q,s-v,x-z (if indicator 2 = 0)	Subjects (LC)
611 a,c-g,j-l,n,p,q,s-v,x-z	Subjects
611 v	Genre Form
630 a,d,e-g,k-p,r-t	Title
630 a,d,e-g,k-p,r-t	Uniform Title
630 a,d,e-g,k-p,r-t,v,x-z (if indicator 2 = 0)	Subjects (LC)
630 a,d,e-g,k-p,r-t,v,x-z	Subjects
630 v	Genre Form

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
648 a,v,x-z	Subjects
648 v	Genre Form
650 a-e,v,x-z (if indicator 2 = 0)	Subjects (LC)
650 a-e,v,x-z (if indicator 2 = 2)	Medical Subjects
650 a-e,v,x-z	Subjects
650 v	Genre Form
651 a,e,v,x-z (if indicator 2 = 0)	Subjects (LC)
651 a,e,v,x-z	Subjects
651 v	Genre Form
653 a	Subjects
653 a (if indicator 2 = 6)	Genre Form
653 a if 2nd indicator =1-5	Name
654 a-c,e,v,x-z (if indicator 2 = 0)	Subjects (LC)
654 a-c,e,v,x-z	Subjects
654 v	Genre Form
655 a,b,v,c	Genre Form
655 a-c,v,x-z (if indicator 2 = 0)	Subjects (LC)
655 a-c,v,x-z (if indicator 2 = 2)	Medical Subjects
655 a-c,v,x-z	Subjects
655 c	Genre Form
69x	Local Subjects
690 a-e,v,x-z (if indicator 2 = 0)	Subjects (LC)
690 a-e,v,x-z	Subjects
690 v	Genre Form
691 a,e,v,x-z	Subjects (LC), Subjects
691 v	Genre Form
696 a-d,f,g,j-v,x-z (if indicator 2 = 0)	Subjects (LC)
696 a-g,j-v,x-z	Name
696 a-d,f,g,j-v,x-z	Subjects

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
696 v	Genre Form
697 a-g,j-v,x-z (if indicator 2 = 0)	Subjects (LC)
697 a-g,j-v,x-z	Name
697 a-g,j-v,x-z	Subjects
697 v	Genre Form
698 a,c-g,j-l,n,p,q,s-v,x-z (if indicator 2 = 0)	Subjects (LC)
698 a,c-g,j-l,n,p,q,s-v,x-z	Name
698 a,c-g,j-l,n,p,q,s-v,x-z	Subjects
698 v	Genre Form
699 a,d,e-g,k-p,r-t	Uniform Title
699 a,d,e-g,k-p,r-t,v,x-z (if indicator 2 = 0)	Subjects (LC)
699 a,d,e-g,k-p,r-t,v,x-z	Name
699 a,d,e-g,k-p,r-t,v,x-z	Subjects
699 v	Genre Form
700 a-e,j,q,u	Creator
700 a-e,j,q,u	Name
700 f,k,l-p,r-t	Title
700 x	Standard Number
710 a-e,i,n,u	Creator
710 a-e,i,n,u	Name
710 f,k,l-p,r-t	Title
710 x	Standard Number
711 a,c,d,e,i,j,n,q,u	Name, Creator
711 f,k,l,p,s,t	Title
711 x	Standard Number
720 a	Name
730 a,d,f,g,i,k-p,r-t	Uniform Title
730 a,d,f,i,k-p,r-t	Title

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
730 x	Standard Number
740 a,n,p	Title
751 a,e	Name
752 a-g	Publisher Location
752 a-h	Name
753 a,b,c	Notes
754 a,c,d,x,z	Name
760 a,c,s,t,x	Series
760 x,y	Standard Number
762 a,c,s,t,x	Series
762 x,y	Standard Number
765 u,x-z	Standard Number
766 u,x-z	Standard Number
770 u,x-z	Standard Number
773 t,u,x-z	Standard Number
774 a	Name
774 s,t	Title
774 u, x-z	Standard Number
774 w	Other System Number
776 u,x-z	Standard Number
776 x	ISSN
780 s,t	Title
780 u,x-z	Standard Number
785 s,t	Title
785 u,x-z	Standard Number
787 s,t	Title
787 u,x-z	Standard Number
800 a-d,g,j,q,u	Name
800 a-f,j-v,x	Series

Table 13. MARC Bibliographic Tags - Search Indexes Mapping

Tag	Search Index
800 f,k-p,r-t	Title
800 x	Standard Number
810 a-e,g,n,u	Name
810 a-g,k-p,r-t,v,x	Series
810 f,k-p,r-t	Title
810 x	Standard Number
811 a,c,d,e,g,j,n,q,u	Name
811 a,c-g,j-n,p-q,s-v,x	Series
811 f,k-n,p,s-t	Title
811 x	Standard Number
830 a,d,f-g,k-p,r-t,v,x	Series
830 a,d,f-g,k-p,r-t,v	Title
830 a,d,f-g,k-p,r-t,v	Uniform Title
830 x	Standard Number
852 b	Sublocation
852 c	Shelving Location
852 h	Classification Part
856 u,z	Electronic location and note

The following table displays the search indexes and the MARC bibliographic tags and Alma tables to which they are mapped that are available when performing an All Titles search.

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Title	031 d,t
	130 a,d,g,k,l,m-p,r-t
	210 a
	214 a
	222 a,b
	240 a,d,f,g,k-p,r,s
	242 a,b,n,p
	243 a,d,f,g,k,l-p,r,s
	245 a,b,k,n,p
	246 a,b,n,p
	247 a,b,n,p
	400 a,k,n,p,t
	410 a,k,n,p,t
	411 k,n,p,t
	440 a,n,p
	490 a
	505 t
	630 a,d,e-g,k-p,r-t
	700 f,k,l-p,r-t
	710 f,k,l-p,r-t
	711 f,k,l,p,s,t
	730 a,d,f,i,k-p,r-t
	740 a,n,p
	774 s,t
	780 s,t
	785 s,t
	787 s,t
	800 f,k-p,r-t
	810 f,k-p,r-t
	811 f,k-n,p,s-t
	830 a,d,f-g,k-p,r-t,v

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Uniform title	130 a,d,f,g,k-p,r-t 240 a,d,f,g,k-p,r,s 243 a,d,f,g,k-p,r,s 630 a,d,e-g,k-p,r-t 699 a,d,e-g,k-p,r-t 730 a,d,f,g,i,k-p,r-t 830 a,d,f-g,k-p,r-t,v
Serial Title	222 a,b
Creator	100 a-d,j,q,u 110 a-e,n,u 111 a,c-e,n,q,u 700 a-e,j,q,u 710 a-e,i,n,u 711 a,c-e,i,j,n,q,u

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Names	100 a-d,g,j,q,u
	110 a-e,g,n,u
	111 a,c,d,e,g,n,q,u
	245 c
	400 a-d,g
	410 a-d,g
	411 a,c-e,g,q
	505 r
	508 a
	511 a
	600 a-d,g,j,q,u
	610 a-e,g,u
	611 a,c-e,g,n,q,u
	653 a if 2nd indicator =1-5
	696 a-g,j-v,x-z
	697 a-g,j-v,x-z
	698 a,c-g,j-l,n,p,q,s-v,x-z
	699 a,d,e-g,k-p,r-t,v,x-z
	700 a-e,j,q,u
	710 a-e,i,n,u
	711 a,c,d,e,i,j,n,q,u
	720 a
	751 a,e
	752 a-h
	754 a,c,d,x,z
	774 a
	800 a-d,g,j,q,u
	810 a-e,g,n,u
	811 a,c,d,e,g,j,n,q,u

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Subjects	600 a-d,f,g,j-v,x-z 610 a-g,j-v,x-z 611 a,c-g,j-l,n,p,q,s-v,x-z 630 a,d,e-g,k-p,r-t,v,x-z 648 a,v,x-z 650 a-e,v,x-z 651 a,e,v,x-z 653 a 654 a-c,e,v,x-z 655 a-c,v,x-z 690 a-e,v,x-z 696 a-d,f,g,j-v,x-z 697 a-g,j-v,x-z 698 a,c-g,j-l,n,p,q,s-v,x-z 699 a,d,e-g,k-p,r-t,v,x-z
Subjects (LC)	600 a-d,f,g,j-v,x-z 610 a-g,j,l-v,x-z (if indicator 2 = 0) 611 a,c-g,j-l,n,p,q,s-v,x-z (if indicator 2 = 0) 630 a,d,e-g,k-p,r-t,v,x-z (if indicator 2 = 0) 650 a-e,v,x-z (if indicator 2 = 0) 651 a,e,v,x-z (if indicator 2 = 0) 654 a-c,e,v,x-z (if indicator 2 = 0) 655 a-c,v,x-z (if indicator 2 = 0) 690 a-e,v,x-z (if indicator 2 = 0) 691 a,e,v,x-z 696 a-d,f,g,j-v,x-z (if indicator 2 = 0) 697 a-g,j-v,x-z (if indicator 2 = 0) 698 a,c-g,j-l,n,p,q,s-v,x-z (if indicator 2 = 0) 699 a,d,e-g,k-p,r-t,v,x-z (if indicator 2 = 0)
Medical Subjects (MeSH)	650 a-e,v,x-z (if indicator 2 = 2) 655 a-c,v,x-z (if indicator 2 = 2)

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Series	400 a-d,g,k,p,n,t,v,x 410 a-d,g,k,p,n,t,v,x 411 a,c,d,e,q,k,n,p,t,v,x 440 a,n,p,v,x 490 a,v,x 533 f 534 f 760 a,c,s,t,x 762 a,c,s,t,x 800 a-f,j-v,x 810 a-g,k-p,r-t,v,x 811 a,c-g,j-n,p-q,s-v,x 830 a,d,f-g,k-p,r-t,v,x
Publisher	260 b,f 261 a,b,e 262 b 264 b 502 c 533 c
LC Call Number	050 a 055 a (if indicator 2 = 0-5) 090 a
Dewey Decimal Class Number	082 a 092 a
UDC	080 a
Other Classification Number	084 a
Additional Publication Year	008 07-10 008 11-14 260 c 260 g 264 c

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Publication Year	260 c
Language	008 35-37 041 a,b,d,e,f,g,j
Collection	Internal Alma algorithm
LC Control Number	010 a,z
ISBN	020 a,z
ISSN	022 a,y,z 776 x
ISSN link	022 l m
Other Standard ID	024 a,z if 2nd indicator = 2 024_8
Government Document Number	074 a,z 086 a,z 096 a,z
National bibliography number	015 a,z,2
Publisher number	028 a

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Standard number	010 a,b,z 015 a,z 016 a,z 020 a,z 022 a,l,m,y,z 024 a,z 037 a 088 a,z 490 x 534 o,x,z 700 x 710 x 711 x 730 x 760 x,y 762 x,y 765 u,x-z 766 u,x-z 770 u,x-z 773 t,u,x-z 774 u,x-z 776 u,x-z 780 u,x-z 785 u,x-z 787 u,x-z 800 x 810 x 811 x 830 x
Other System Number	035 a,z 019 a,z 774 w

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Copyright Note	542 g,l,n
Notes	501 a 502 a-d,g,o 504 a 508 a 510 a,c 511 a 518 strip numeric subfields 521 a 522 a 526 a 533 a-f,n 534 a-c,e-f,k-p,t 536 a-h 538 a 541 a,c,d,e 545 a,b 550 a 550 a 561 a 586 a 753 a,b,c
Local notes	59x
Description	505 a,g,r,t 520 a,b
MMS ID	001 (MMS ID)
Bibliographic format	LDR
Bibliographic level	LDR
Date type status	008
Edition	250 a,b
Has inventory	Internal Alma algorithm

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
MMS SIP ID	Alma SIP_ID table
Physical description	007
Public note	500 a,3,5,6,8
Is linked	True when the Alma LINK_ID table is not empty.
Country of Publication	008 15-17 044 a,c
Genre Form	600 v 610 v 611 v 630 v 648 v 650 v 651 v 653 a (if indicator 2 = 6) 654 v 655 a,b,v,c 690 v 691 v 696 v 697 v 698 v 699 v
Publisher Location	260 a,e 261 f 262 a 264 a 533 b 752 a-g
Material Type	Based on LDR 6-
Medium Type	245 h

Table 14. Search Indexes - MARC Bibliographic Tags Mapping

Search Index	Tag
Originating System ID	Alma ORIGINATING_SYSTEM_ID table
Originating System	Alma ORIGINATING_SYSTEM table
Tag Suppressed	Alma TAG_SUPPRESSED table
Tag Sync External Catalog	Alma TAG_SYNC_EXTERNAL_CATALOG table
Tag Sync National Catalog	Alma TAG_SYNC_NATIONAL_CATALOG table
Tag Brief	TAG_BRIEF
Electronic location and note	856 u,z
Event Date	033
Other Standard Identifier	024 8,a
Source Record ID	004
Additional Physical Form Available Note	530 a
Carrier type code	338 b
Carrier type term	338 a
Classification Part	852 h
Content type code	336 b
Content type term	336 a
Geographic Area Code	043 a,b,c
MMS creation date	Alma CREATE_DATE field
Media type code	337 b
Media type term	337 a
Relator	100 e,4
Shelving Location	852 c
Sublocation	852 b

Keyword Search Indexes

The following table displays the fields searched when performing a keywords search.

NOTE:
To determine the MARC fields searched for an All Titles search, refer to **Table 14**.

- All Titles
  - Creator
  - Government Document Number
  - ISBN
  - ISMN – MARC 24 a,z
  - ISSN
  - LCCN
  - Subjects (LC)
  - Medical Subjects (MeSH)
  - Name
  - National Bibliography Number
  - Electronic Location
  - Citation – MARC 510 a,c
  - Publisher
  - Publisher Number
  - Series
  - Subjects
  - Title
  - Uniform Title
  - Serial Title
  - Date of Publication
  - Edition
  - Public Note
  - Other System Number

NOTE:
In addition, all subfields of MARC field 774 are searched when performing a keywords search.

- Physical Items
  - Holding Note
  - Barcode
  - Item Description
  - Fulfillment Note
  - Internal Note 1
  - Internal Note 2
  - Internal Note 3
  - Public Note
  - Storage Location ID
- Electronic Portfolios
  - Package Name
  - Creator Name
  - Category
  - Interface ID
- Collections
  - IEC Label
  - IEC External System
  - IEC External System ID
- Electronic Collection
  - Package Name
- Digital Files
  - File Label
  - File Note
  - Risk Library Identifiers
  - File Original Name
  - AR Description
  - Representation Label
- Authorities – see the following table:

Table 15. Authority Keyword Search Indexes

Search Index	Tag
Corporate Name	110 a-d,n
See Corporate Names	410 a-d,n
See Also Corporate Names	510 a-d,n
Meeting Name	111 a,c,d,n,q
See Meeting Names	411 a,c,d,n,q
See Also Meeting Names	511 a,c,d,n,q
Personal Names	100 a-d,q
See Personal Names	400 a-d,q
See Also Personal Names	500 a-d,q
Subject	148 a,v,x,y,z 150 a,b,v,x,y,z 151 a,v,x,y,z 155 a,v,x,y,z 180 v,x,y,z 181 v,x,y,z 182 v,x,y,z 185 v,x,y,z
See Subjects	448 a,v,x,y,z 450 a,b,v,x,y,z 451 a,v,x,y,z 455 a,v,x,y,z 480 v,x,y,z 481 v,x,y,z 482 v,x,y,z 485 v,x,y,z

Table 15. Authority Keyword Search Indexes

Search Index	Tag
See Also Subjects	548 a,v,x,y,z 550 a,b,v,x,y,z 551 a,v,x,y,z 555 a,v,x,y,z 580 v,x,y,z 581 v,x,y,z 582 v,x,y,z 585 v,x,y,z
Uniform Title	130 a,d,f,k-t 430 a,d,f,k-t 530 a,d,f,k-t
Originating System ID	originating_system_id

The following table displays MARC holdings tags and the search indexes to which they are mapped.

Table 16. Search Indexes Mapping - MARC Holdings Tags

Index	Tag
Accession Number	depends on institution configuration
Call Number Suffix	852.m
Carrier type term	338 a
Carrier type code	338 b
elocation	856 u,z
Holdings Note	852 x, z and 866 x, z
Library	852 b
Media type term	337 a
Media type code	337 b
MMS ID	MMS ID
Ownership and Custodial History	561 a
Permanent Call Number	852 k,h,i,j,l,m

Table 16. Search Indexes Mapping - MARC Holdings Tags

Index	Tag
Permanent Call Number Type	852 1st indicator
Permanent Physical Location	852 c
Summary Holding	866 a

The following table displays Dublin Core terms and the search indexes to which they are mapped.

Table 17. Search Indexes Mapping - Dublin Core Terms

Dublin Core Term	Index
dc:contributor	contributor
dcterms:contributor	contributor
dc:creator	creator
dcterms:creator	creator
dc:date	date
dcterms:created	date
dcterms:date	date
dcterms:dateAccepted	date
dc:description	description
dcterms:abstract	description
dcterms:description	description
dcterms:tableOfContents	description
dc:identifier	identifier
dc:identifier dcterms:ISSN	identifier
dc:identifier dcterms:ISBN	identifier
dcterms:identifier	identifier
dcterms:identifier dcterms:ISBN	identifier
dcterms:identifier dcterms:ISSN	identifier
dc:identifier dcterms:ISBN	isbn
dcterms:identifier dcterms:ISBN	isbn
dc:identifier dcterms:ISSN	issn

Table 17. Search Indexes Mapping - Dublin Core Terms

Dublin Core Term	Index
dcterms:identifier dcterms:ISSN	issn
dc:language	language
dcterms:language	language
dc:subject dcterms:LCSH	lcsh
dcterms:subject dcterms:LCSH	lcsh
dc:type	medium_type
dcterms:type	medium_type
dc:subject dcterms:MESH	mesh
dcterms:subject dcterms:MESH	mesh
dc:coverage	notes
dc:rights	notes
dc:source	notes
dcterms:audience	notes
dcterms:bibliographicCitation	notes
dcterms:coverage	notes
dcterms:educationLevel	notes
dcterms:mediator	notes
dcterms:rights	notes
dcterms:source	notes
dcterms:spatial	notes
dcterms:temporal	notes
dc:publisher	publisher
dcterms:publisher	publisher
dc:publisher	publisher_location
dcterms:publisher	publisher_location
dc:subject	subjects
dcterms:subject	subjects
dc:title	title
dcterms:alternative	title

Table 17. Search Indexes Mapping - Dublin Core Terms

Dublin Core Term	Index
dcterms:title	title

3

List of External Search Resources

The following is a list of external search resources that are currently available in Alma (see **External System Search** for a full explanation of this feature in Alma):

- Abertswyth University Library Catalogue
- AMICUS – requires credentials to access
- Australian National Bibliographic Database (Test) – requires credentials to access
- Bavarian Library Network – requires credentials to access
- BDZ (BDS) – requires credentials to access
- BDZ DVD/BLURAY MARC21 Cataloguing Service (BDS) – requires credentials to access
- BDZ Music Data MARC21 Cataloguing Service (BDS) – requires credentials to access
- Biblioteca Nacional de Espana
- BN-OPALE PLUS (BNF)
- British Library Integrated Catalogue
- British Library Integrated Catalogue (MARC) – requires credentials to access
- British National Bibliography (BNB) – requires credentials to access
- CAPITA (BDSAllM21) – requires credentials to access
- CAPITA (BLConM21) – requires credentials to access
- CAPITA (LCAllM21) – requires credentials to access
- CAPITA (NLMAllM21) – requires credentials to access
- CAPITA (UnionM21) – requires credentials to access
- CARM Centre (CAVAL)
- Catalog of U.S. Government Publications (CGP Z39.50) – requires credentials to access
- CLICNET Catalog

- COPAC
- Curtin University Library
- DBC (The Danish Bibliographic Centre)
- Edinburgh University Library
- German National Library – MARC21 – requires credentials to access
- Global Books in Print (Bowker) – requires credentials to access
- Hessische Bibliothekssystem (HeBIS)
- HOLLIS Catalog – Harvard
- James Bennett Online
- Katalog des Bibliotheksverbunds IDS Basel Bern
- Laval University Library
- Libraries Australia – requires credentials to access
- Libraries Australia Modified – requires credentials to access
- Library of Congress (United States Library of Congress (LOC))
- LIBRIS - Swedish Union Catalogue
- London School of Economics
- MnPALS
- Monash University Library Catalogue
- Monash University of Malaysia
- Monash University South Africa
- National Art Library Victoria and Albert Museum
- National Library of Australia
- National Library of Israel
- National Library of Korea (National Shared Cataloging)
- National Library of Malaysia
- National Library of New Zealand
- National Library of Scotland
- National Library of Wales
- National University of Singapore Library
- Netzwerk von Bibliotheken und Informationsstellen in der Schweiz (NEBIS)
- NLM LocatorPlus (z39 gateway - OPAC)
- OCLC WorldCat (through Libraries Australia) – requires credentials to access

- Ohio Link
- Online Dakota Information Network (ODIN)
- Open Vlacc (Vlaamse Centrale Catalogus) – requires credentials to access
- Oxford University (Oxford University)
- Purdue University Catalogue – requires credentials to access
- Reseau des bibliotheques de Suisse occidentale (RERO)
- RLUK Research Libraries UK – requires credentials to access
- Russian State Library
- South Dakota Library Network (SDLN)
- State Library of Victoria
- SUDOC (Brief Records USMARC)
- SUNCAT (MARC) – requires credentials to access
- SWB Katalog (Sudwestdeutscher Bibliotheksverbund)
- Swinburne Library – Swinburne University of Technology
- Swiss National Library (NB) – requires credentials to access (idPass authentication).
- Te Puna Search – requires credentials to access
- The National and Copenhagen University Library
- ULI – Israel Union List (MALMAD Israel Center for Digital Information Services)
- ULS (Israel Union List of Serials)
- Universiteit Gent
- University of Malaya Library
- University of Melbourne Library
- University of Ottawa Library
- University of Sydney
- University of the Arts London – Library Catalogue
- WorldCat (OCLC) – requires credentials to access
- Yale University Library
- Zeitschriftendatenbank (ZDB)

4

Metadata Management

This section includes:

Opening the Metadata Editor

PERMISSIONS:

To work with metadata, you must have one of the following roles:

- Cataloger
- Catalog Manager
- Catalog Administrator

The Metadata Editor enables you to view and edit bibliographic metadata. You can also view and edit holdings and authorities in the Metadata Editor.

The Metadata Editor can be opened from the Alma main menu (**Resource Management > Cataloging > Open Metadata Editor**) or by clicking Edit for a specific title in your search results.

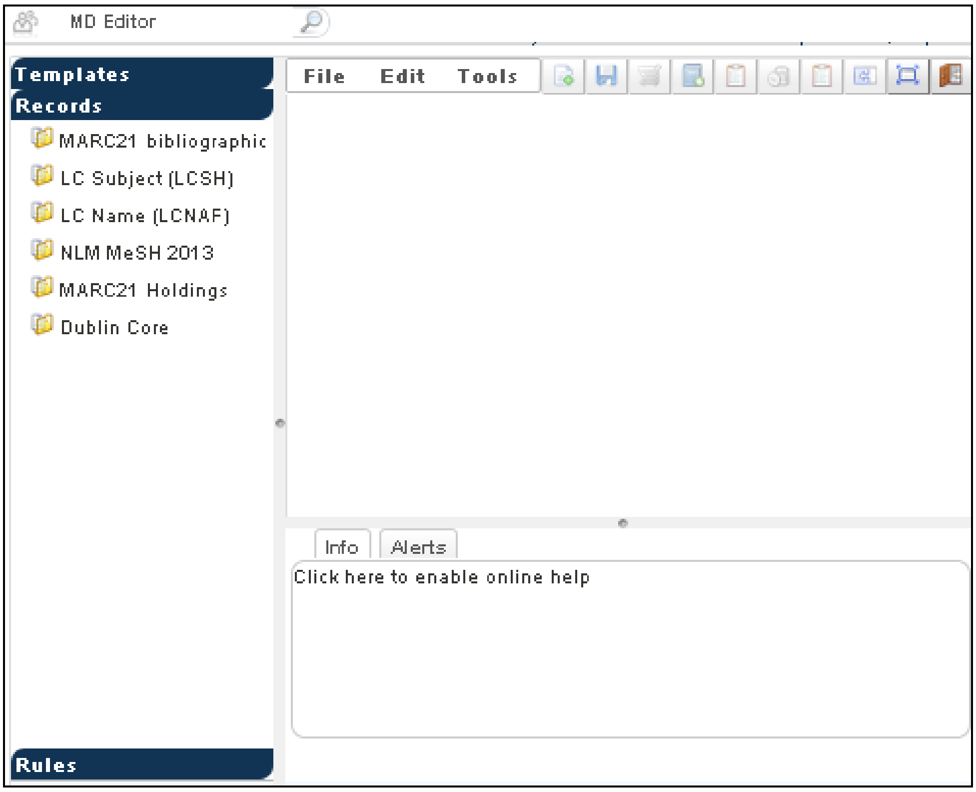


Figure 96: MD Editor Page (Alma Main Menu)

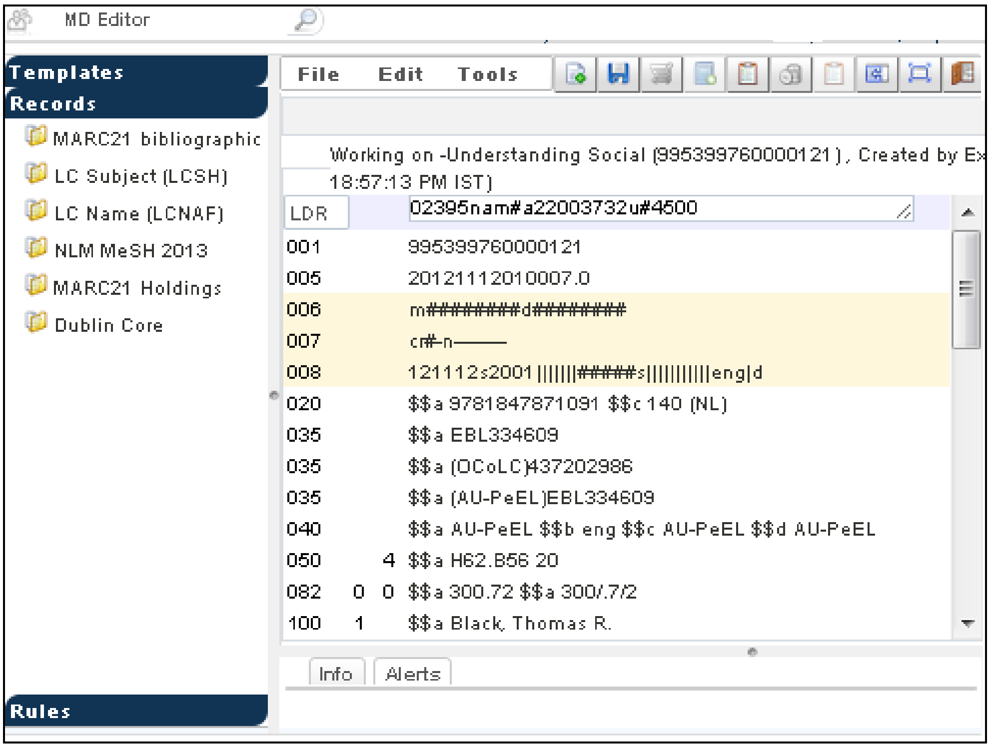


Figure 97: MD Editor Page (Edit from Search Results)

Navigating the MD Editor Page

The MD Editor is designed to facilitate streamlined cataloging of bibliographic, holdings, and authority metadata.

The MD Editor has the following working areas or panes:

- **Left Pane** on page **150**
- **Main Pane** on page **150**
- **Lower Pane** on page **150**

For an example of these working areas in the MD Editor see **MD Editor Working Example** on page **151**.

Other MD Editor details provided in this section include:

- **Creating Bibliographic Records with the MD Editor** on page **151**
- **Creating Holdings Records with the MD Editor** on page **151**
- **Creating Local Authority Records Using the MD Editor** on page **155**
- **MD Editor Menu and Toolbar Options** on page **155**
- **Saving Records in the MD Editor** on page **164**

- **Entering Diacritics and Special Characters in the MD Editor** on page **165**

Left Pane

The left pane has the following tabs:

- Templates – This tab contains templates that enable you to create new records based on a template, or use one of the templates to override existing data. For details on this tab, see **Working with Templates** on page **181**.
- Records – This tab contains the brief title information (move the mouse over a record and a tool tip displays the full title) and metadata ID linked to the MD record. The information presented depends on the type of resource being edited. Records are grouped according to type such as MARC21 bibliographic, MARC21 holdings, LC subject, LC name, NLM MeSH, and Dublin Core.

  The **Local Repository** icon indicates that the record exists in the local repository. The **Editor** icon indicates that the record has been saved to the repository. The **Suppressed** icon indicates that the record has been suppressed from external discovery systems, including Primo.
- Rules – This tab contains the private and shared normalization rules that you or others created and Merge rules. For details regarding this tab, see **Working with Normalization Rules** on page **220** and **Working with Merge Rules** on page **254**.

Main Pane

The main pane is the main working area that displays the record information. This area includes menu bars and a toolbar. For details, see **MD Editor Menu and Toolbar Options** on page **155**.

Lower Pane

The lower pane provides additional assistance for editing a record and includes the following tabs:

- Info – This tab contains field sensitive data based on MD registry definitions which, by default, is from the Library of Congress. If you are editing DC records, the information is from the DC site.
- Alerts – This tab contains field, subfield, indicator, and fixed-field, content-level warnings based on the MD registry. You can click any error in red (not overridable) or warning in yellow (overridable) to link directly to the field identified by the alert.

MD Editor Working Example

The following illustration shows an example of the MD Editor where a record is in the process of being edited. At the top of the Main pane, in the red rectangle, there is a warning message that the field being edited (in the blue rectangle) has incorrect or missing information that is listed in the Alerts tab (in the yellow rectangle).

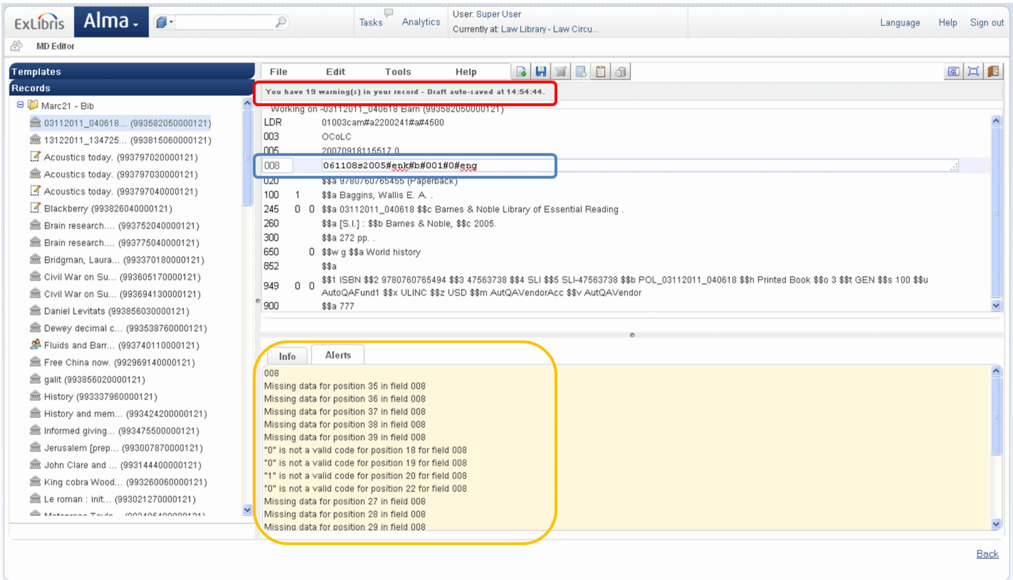


Figure 98: MD Editor Main Page

When you open a record in the repository for editing, it is checked out to you. This prevents other users from modifying the same record and perhaps overriding your changes.

Creating Bibliographic Records with the MD Editor

For information about working with bibliographic records and how to create bibliographic records in the MD Editor, refer to **Working with Bibliographic Records** on page **172** and/or **Creating Bibliographic Records** on page **173**.

Creating Holdings Records with the MD Editor

Alma provides the MD Editor for creating holdings records. Holdings records provide location information for bibliographic records. In order for a holdings record to exist, there must be a bibliographic record to which it is linked.

To create a holdings record:

1. Open (or create) a bibliographic record in the MD Editor.
2. Click **File > New > MARC21 Holdings**.

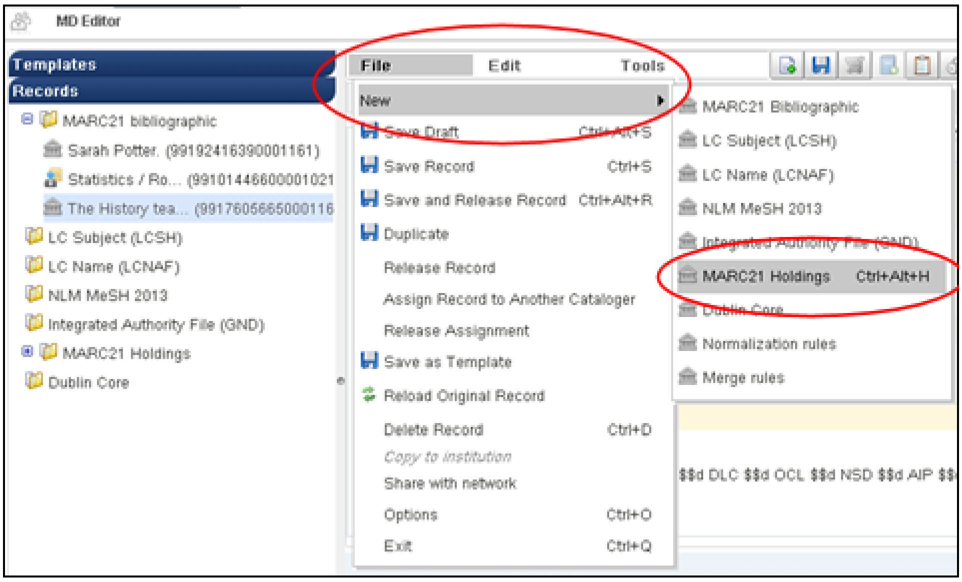


Figure 99: File > New > MARC21 Holdings

The MD Editor opens in split pane mode with the MARC21 holdings template open in the right area.

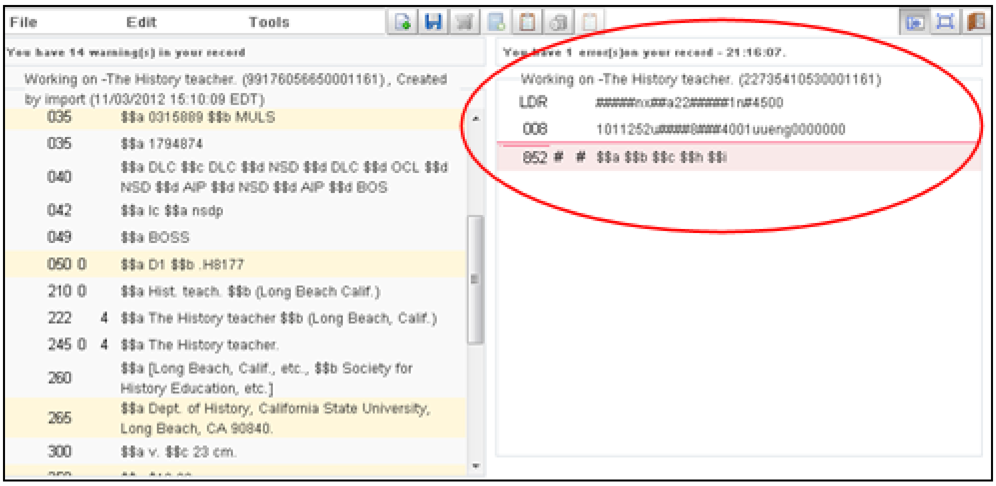


Figure 100: MARC 21 Holdings Template (Split Screen Mode)

3. Enter your holdings data. See **MD Editor Menu and Toolbar Options** on page 155 for additional information regarding working with the MD Editor

4 Click the **Save** icon. For additional information regarding saving records, see **Saving Records in the MD Editor** on page **164**.

Creating the 866/867/868 Fields in a Holdings Record Automatically

Alma provides options to increase your productivity when creating holdings records. In particular, you can automatically create the 866/867/868 fields in the holdings record from linked 853/854/855 and 863/864/865 fields. To do this you need to configure the MARC21 holdings profile.

VIDEO:

Learn how to create a normalization rule that automatically creates 866/7/8 fields in holdings records in **the** *Automatically Create 866/7/8 Fields in Holdings Records* video (6:18 mins)**.**

To configure the MARC21 holdings profile to automatically create the 866/867/868 fields in a holdings record:

1 On the Metadata Configuration List page (**Resource Management > Configuration > Configuration Menu > Cataloging section > Metadata Configuration)**, click the **MARC21 Holding** link in the Profile column.

Figure 101: MARC21 Holding Profile Link

The Profile Details page displays.

2 Click the **Normalization** tab.

3 Add a holdings process.

a Click **Add Process**.

b Enter **Populate 86X Fields**, for example, for a process name.

c Enter a description.

d Confirm that **Active** is the selected Status and click **Next**.

e Select **marc21ExpandHoldingBy86XTask** and click **Add to Selection**.

f Optionally, you may add other processes from the Process List Pool and sequence them in the order that you prefer or add processes at a later time by editing (**Actions > Edit**) the **Task List** tab of the **Populate 86X Fields** process.

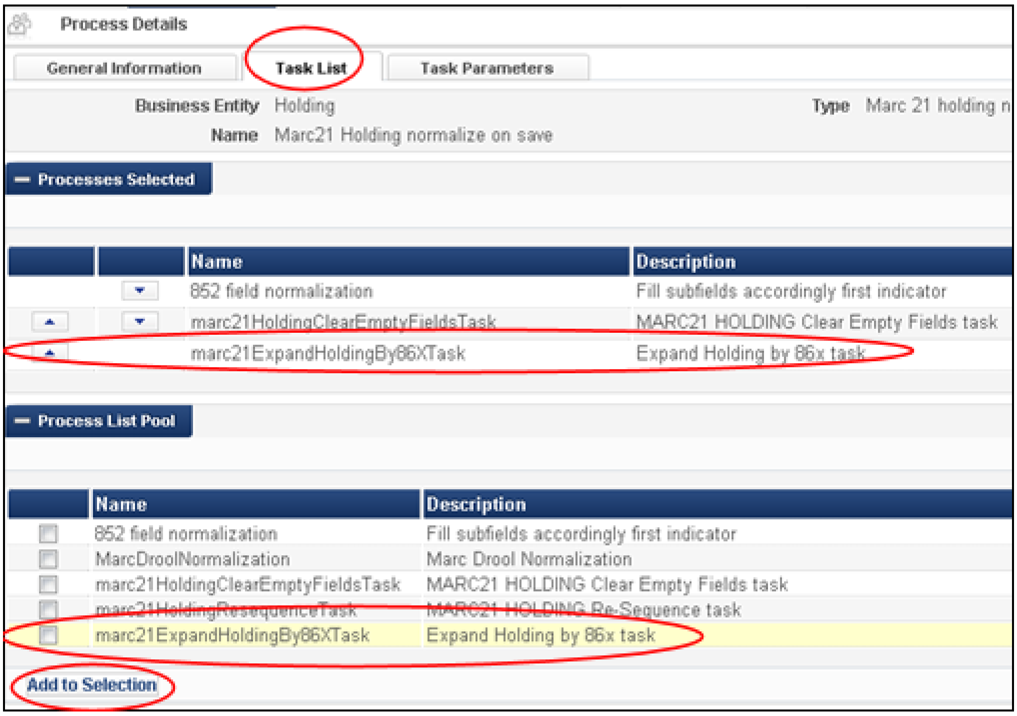


Figure 102: Task List Tab - marc21ExpandHoldingBy86XTask Process Added to Selected List

g Click **Next** and click **Save**.

You can now create a holdings record using the MD Editor and the system will automatically create the 866/867/868 fields from the 853/854/855 and 863/864/865 linked fields

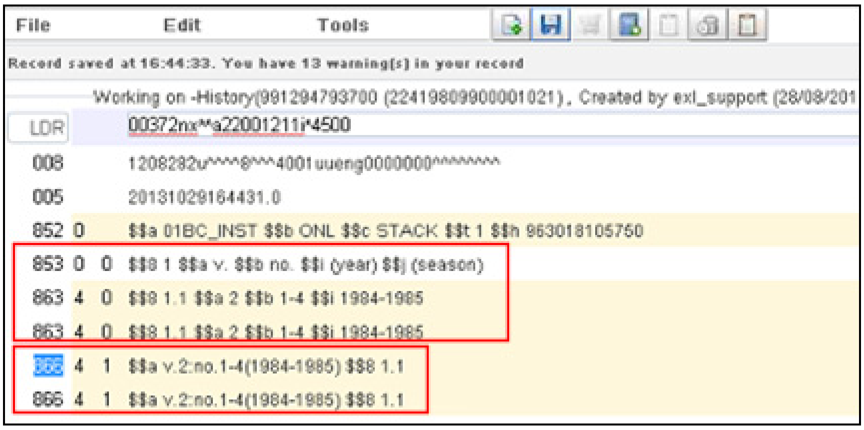


Figure 103: Example of a Holdings Record with the 866 Fields Automatically Created

Creating Local Authority Records Using the MD Editor

For information about working with authority records and how to create local authority records in the MD Editor, refer to **Working with Authority Records** on page **184** and/or **Creating Local Authority Records Using the MD Editor** on page **191**.

MD Editor Menu and Toolbar Options

The following tables describe the various menu and toolbar options in the MD Editor.

NOTE:

To navigate between records that you are working on in the MD Editor, use the Alt + --> or <-- (right or left arrows).

Table 18. MD Editor – File Menu

Action	Description
New	Adds an empty record (according to your selection) as a draft in order to catalog and save it to the repository (or as a template).
Save Draft (Ctrl+Alt+S)	Runs validation routines and saves the record as a draft. Your changes are saved, but the changes are not updated in the repository at this time. The record remains checked out to you and is not available to other catalogers for editing.
Save Record (Ctrl+S)	Saves the changes made to the record in the repository but does not release the record. Use the Release Record option to release the record.

Table 18. MD Editor – File Menu

Action	Description
Save and Release Record (Ctrl+Alt+R)	Saves the record and releases it.
Duplicate	Creates a copy of the record.
Release Record	Releases the record without saving the changes.
Assign Record to Another Cataloger	Reassigns the record to another cataloger. The record is displayed in bold in the list of assignments in the MD Editor and a note is added under **Tools > View Notes**.
Release Assignment	The Catalog Manager can release locks on bibliographic records that are assigned to other catalogers.
Save as Template	Saves the current record as a template for recurrent use.
Reload Original Record	Reloads (overwrites) the active record with the last version of the record saved in the repository and, thereby, discarding any draft changes made.
Delete Record (Ctrl+D)	This option is enabled for a user with the Cataloger Extended role. A bibliographic record can be deleted only if there are no PO lines or inventory associated with it. For information about deleting bibliographic records in bulk, see **Batch Deleting Bibliographic Records** on page 178.
Copy to Catalog	Copies a shared bibliographic record to the local repository (IZ) of your institution. This copy of the record is unlinked from the CZ. In subsequent activations, the copied bibliographic record is not copied again to the IZ. To prevent duplicates, Alma attempts to identify the original system ID; and if it matches an IZ bibliographic record, the IZ bibliographic record is used.
Share with Network	Shares a locally created record with the Network Zone.
Options	Indicate (in the Placement of New Bibliographic Records dialog box) whether to place the record locally or in the Network Zone.
Exit (Ctrl+Q)	Exits the editor, and discards any unsaved changes (unless you select to save a draft upon exit). Exiting the editor does not release any records, and they remain checked out to you until you specifically release them using the Release Record option.

Table 19. MD Editor – Edit Menu

Action	Description
Add Field (F8)	Adds a new empty row that can be set with a field value when cataloging.
Remove Field (Ctrl+F6)	Removes the selected field row.
Add Sub Field (F9)	Adds a new sub field with a separator $$to allow inline cataloging of the active field.
Add Localized Field	Add a localized field to a Network Zone record (fields 9xx, 09x, 59x, 69x).
Add Alternate Graphic Representation	Enables you to edit paired fields without the complexity of 880 linkage. For example, if you have the 245 field selected, this option enables you to choose a relevant script for input. An additional line opens in the editor for input in the designated script.
Add Rule	Add a normalization rule.
Enhance the Record (Ctrl+Alt+E)	Runs preconfigured normalization routines. Normalizations are intended to correct or update metadata records. For example, sorting a record's fields, removing empty fields, or stripping out fields containing order information.
Expand from Template (Ctrl+E)	Expands a record's data fields using a specified template. The record may be any of the following types: bibliographic, holdings, and authority. For more information, see **Expanding a Record from a Template** on page **165**.
Split Editor (F6)	Enables a side-by-side editing of two records (although only one side is active at a time). Click the right panel, and click a record from the list of records. This option is also available via the Split Editor icon . Pressing F6 again removes the split screen.
Full Screen (F7)	Opens the main editing pane in the entire page. This option is also available via the Full Screen icon . Pressing F7 again reverts to normal view.
Open Form Editor (Ctrl+F)	Functional only for MARC fixed fields, such as LDR and 001-009, or for complex fields, such as holdings 852.

Table 19. MD Editor – Edit Menu

Action	Description
Close Form Editor (Esc)	Exits the control field editor and returns to the standard editor view.
Cut (Ctrl+X)	Cuts the selected text.
Copy (Ctrl+C)	Copies the selected text. To copy multiple fields simultaneously, press Ctrl and select all the fields to be copied.
Paste (Ctrl+V)	Pastes text that was previously cut or copied. Fields are pasted at the cursor location. Pasting multiple fields simultaneously pastes the fields in their numerical sort order.

Table 20. MD Editor – Other Editing Options

Action	Description
Arrow Up	Moves the cursor up field by field in a record.
Arrow Down	Moves the cursor down field by field in a record.
Arrow Right	Moves the cursor to the right across the field, subfield, indicator, and content information.
Arrow Left	Moves the cursor to the left across the field, subfield, indicator, and content information.

Table 21. MD Editor – Tools Menu

Action	Description
Search External Resources	Enables you to search external bibliographic databases, view and select relevant records before importing them to the repository. This option is usually chosen for copy cataloging workflows.
View Versions	Enables you to view and restore a previous version of the record.
View Versions of Original Record	View previous versions of a local record before you saved it to the Network Zone.
Validity Check	Executes validation routines on the bibliographic record. Validation issues are displayed in the Alerts tab.

Table 21. MD Editor – Tools Menu

Action	Description
Validate in Collaborative Zone	Validates the local bibliographic record according to the validation rules of the Network Zone.
Browse Call Numbers (Alt+C)	Opens in split editor mode with options to select a call number type (Library of Congress, National Library of Medicine, and so forth) and a specific call number in order to perform a browse of the holdings records' 852 $$h fields. Note that the way in which this browse works cannot be configured. **NOTE:** This functionality is also available by selecting **Resource Management > Cataloging > Browse Shelf Listing** from the main Alma menu.
View Notes	Displays working copy notes.
Release All Records For User	Enables a catalog manager to release all of the bibliographic and holdings records assigned to a specific user. Consistent with previous capabilities, the released records become unassigned and are available to all other catalogers for processing.
MARC21 Bibliographic:	
Add Holdings (Ctrl+Alt+H)	Adds a holdings record that is linked to the current bibliographic record.
Add Local Portfolio	Opens the New Portfolio page (see **Managing Local Portfolios** on page 327).
Create PO Line & Exit (Ctrl+Alt+O)	Creates a PO line based on the bibliographic information in the active record. (This requires the Inventory Operator role permissions).
Derive New Record	Allows you to create a new bibliographic record based on the related bibliographic record and the default template. In addition, it also includes the relations supported by either the 773 or 775 field. For more information, see **Deriving a New Bibliographic Record** on page 169.

Table 21. MD Editor – Tools Menu

Action	Description
Find Matches (Ctrl+M)	Checks whether there are matches for the current record in your local catalog. To define the correct match profile to be used, you must include the appropriate file key in the `serial_match_profile` and `non_serial_match_profile` Parameter Value column (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**). For detailed information on these file keys, see the table in Configuring Other Settings on page 695.
View Inventory (Ctrl+I)	Checks for the following inventory linked to the bibliographic record and displays the results in split editor mode: ■ Holdings ■ Portfolios ■ Representations (digital) ■ Electronics databases Since the bibliographic record can be linked to physical, digital, or electronic resources, they may all be listed.
View in Search	Displays the record in the results list format on the Repository Search page.
View Orders	Displays the record in the PO line list format on the Select PO Line page (when there is an order).
Related Records	Checks whether there are records that were defined as related to the current record, on which the Record Relations job was run. For details, on creating and viewing related records, see *The 77x Fields in Alma* (under **Alma > Product Documentation> Resource Management > How To Presentations**).
MARC21 Holdings	
Add Another Holding (Ctrl+Alt+H)	Add another holdings record to the bibliographic record.
Add Item (Alt+I)	Add an item record to the holdings record.
Duplicate Holding	Add a copy of the holdings record to the bibliographic record.

Table 21. MD Editor – Tools Menu

Action	Description
View Bibliographic Record (Ctrl+Alt+B)	Display the bibliographic record.
Update from Bibliographic (ALT+U)	Add fields from the bibliographic record to the 852 field in the holdings record, according to the following rules: ■ For the 0 indicator, replaces the h and i subfields with the content of the bibliographic record's 090 a and b subfields (respectively). If there is no 090 field in the bibliographic record, the 050 a and b subfields are used instead. ■ For the 1 indicator, replaces the h and i subfields with the content of the bibliographic record's 082 a and b subfields (respectively). ■ For the 2 indicator, replaces the h and i subfields with the content of the bibliographic record's 060 a and b subfields (respectively). ■ For the 3 indicator, adds the h and i subfields with the content of the bibliographic record's 086 a and b subfields (respectively). If the h and i subfields are already populated, their values are left as is and not replaced. ■ For the 8 indicator, adds the h subfield with a concatenation of the bibliographic record's 084 a subfield values. (If the h subfield is already populated, its value is left as is.) Also replaces the i subfield with a concatenation of the 084 b subfield values. **NOTE:** The above rules are the out-of-the-box settings, which are defined on the Call Number Mapping page (**Resource Management > Resource Configuration > Configuration Menu > General > Call Number Mapping**). For more information, see **Mapping Call Numbers to Holdings** on page **268**.
Relink to a Different Bibliographic Record	Relinks the holdings record to a different bibliographic record.
Generate Accession Number	Generates an accession number for the holdings record in the 852 field.
Dublin Core	
Find Matches	Find the matching bibliographic record.

Table 21. MD Editor – Tools Menu

Action	Description
View Inventory	Checks for the following inventory linked to the bibliographic record and displays the results in split editor mode: ■ Holdings ■ Portfolios ■ Representations (digital) ■ Electronics databases Since the bibliographic record can be linked to physical, digital, or electronic resources, they may all be listed.
View in Search	Displays the record in the results list format on the Repository Search page.
View Orders	Displays the record in the PO line list format on the Select PO Line page (when there is an order).
Set Management Tags:	
Suppress from Discovery	Tags the record to exclude/include it from being published to the end-user discovery system (for example, Primo). If a record has been suppressed, the **Suppressed** icon appears next to the record in the left pane of the MD Editor and in the repository search results.
Export to WorldCat	Tags the record to be included/excluded in the OCLC synchronization. Select the check mark to indicate how to handle the record.
Force export to WorldCat	Causes holdings records linked to the bibliographic record to be included in the next export to OCLC.
Export to Libraries Australia	Tags the record to be included/excluded in the Libraries Australia synchronization. Select the check mark to indicate how to handle the record.
Force export to Libraries Australia	Causes holdings records linked to the bibliographic record to be included in the next export to Libraries Australia.

Table 21. MD Editor – Tools Menu

Action	Description
Brief	Indicates that the record does not have full bibliographic information. You cannot set the value of this tag since it is calculated by the system. When a brief record algorithm has been activated for your system, Alma checks to determine if a record is brief when it is saved to the repository. Subsequently, brief records are identified as brief with the highlighted check mark in the following manner (from **Tools > Set Management Tags**):  Refer to **Identifying brief records** on page **307** in the *Alma Administration Guide* for more information.

Table 22. MD Editor – Toolbar

Action	Description
Add Holdings 	Adds a holdings record that is linked to the current bibliographic record.
Save Record 	Saves the changes made to the record in the repository but does not release the record. use the Release Record option to release the record.
Create PO Line & Exit 	Opens the PO Line Owner and Type page (the first step in manually creating a PO line), exits the MD Editor page, and creates a PO line based on the bibliographic information in the active record. See **Manually Creating a PO Line** in the Alma Acquisitions Guide for more information. (This requires the Inventory Operator role permissions).
Add Item 	Move to the Physical Item Editor to add an item for this holdings record.

Table 22. MD Editor – Toolbar

Action	Description
View Inventory	Opens a list of inventory records linked to the bibliographic record including links to item records. Depending on the inventory contents, the list may include holdings (physical resources), representations (digital resources) and/or portfolios (electronic resources). Since the bibliographic record can be linked to physical, digital, or electronic resources, they may all be listed.
Delete Bibliographic Record	Deletes the bibliographic record from the repository. This option is available only if there are no PO lines or inventory associated with the bibliographic record. For information on deleting bibliographic records in bulk, see **Batch Deleting Bibliographic Records** on page 178.
View Bibliographic Record	Opens in split editor mode to display the associated bibliographic record when working with MARC21 holdings.
Split Editor	Enables a side-by-side editing of two records (although only one side is active at a time). Click the right panel, and click a record from the list of records.
Full Screen	Opens the main editing pane in the entire page.
Exit	Exits the editor, and discards any unsaved changes (unless you select to save a draft upon exit). Exiting the editor does not release any records, and they remain checked out to you until you specifically release them using the Release Record option.

Saving Records in the MD Editor

The MD Editor has an auto-save function that helps prevent changes from being lost before you manually save the draft. These records are only available for editing to the user working on them and are persistent across Web sessions.

When you save a record in the repository, Alma automatically backs up the previous version and saves it for future reference. Previous versions continue to be available even after an open record has been saved and released in the repository, and may be restored in the repository. When you restore a previous version you overwrite the current version in the repository.

When you finish working on a record, you can save the record (from the File menu) or press Ctrl+S. The modified record is saved in the repository but remains checked out to you until you specifically release it (File > Release Record).

Alternatively, you can reload the original record from the repository. This replaces the current draft with the current version of the record and deletes any changes you have made. The record remains checked out to you.

While editing a record, you can also save a draft record (without checking the record in), by pressing Ctrl+Alt+S.

Entering Diacritics and Special Characters in the MD Editor

When cataloging, you may need to enter diacritics, special characters, or non-Latin characters in the MD Editor.

To enter diacritics or special characters into the MD Editor:

1. From the Windows Start menu, select **All Programs > Accessories > System Tools > Character Map**.
2. Select a font from the **Font** drop-down list.
3. Click the special character that you want to insert into the MD Editor.
4. Click **Select**, and then click **Copy**.
5. Paste the character in the MD Editor.

Expanding a Record from a Template

When the Expand from Template option is applied to a record in the MD Editor, the system uses the following process to expand data fields in the record:

1. Regardless of the template's indicators, the system groups all of the template's data fields according to their tags, keeping the occurrence order.
2. For each template group, the system performs the following:
   a. Regardless of the indicators, the system groups all of the record's data fields that match the template group's tag, keeping the occurrence order.
   b. Performs the following comparisons on the first data field in the template's group with the first data field in the record's group as follows (followed by the next data field in each group and so forth).
      - If the template's data field contains a subfield that is not in the corresponding record's data field, the subfield is added to the corresponding record's data field.

- If there is no corresponding data field in the record's group, the entire data field from the template is added to the record.

For example, if the template's group contains the following data fields:

```
Field 1: 260 _3 $$a Boston $$c 1971
Field 2: 260 _3 $$a Boston $$c 1973
```

And the record's group contains only one matching data field:

```
Field 1: 260 __ $$a New York
```

The system will add the subfields from the first data field in the template's group to the first corresponding data field (ignoring the indicators) in the record's group, and also add the full second data field from the template's group to the record since the bibliographic record does not have a second matching data field:

```
260 __ $$a New York $$c 1971
260 _3 $$a Boston $$c 1973
```

VIDEO:

Learn more about expanding a record using a template in the *Expand a Record Using a Template* video (4:24 mins).

To expand a record:

1 Open a record in the MD Editor by clicking **Edit** for a specific title in your search results. The record displays in the MD Editor.

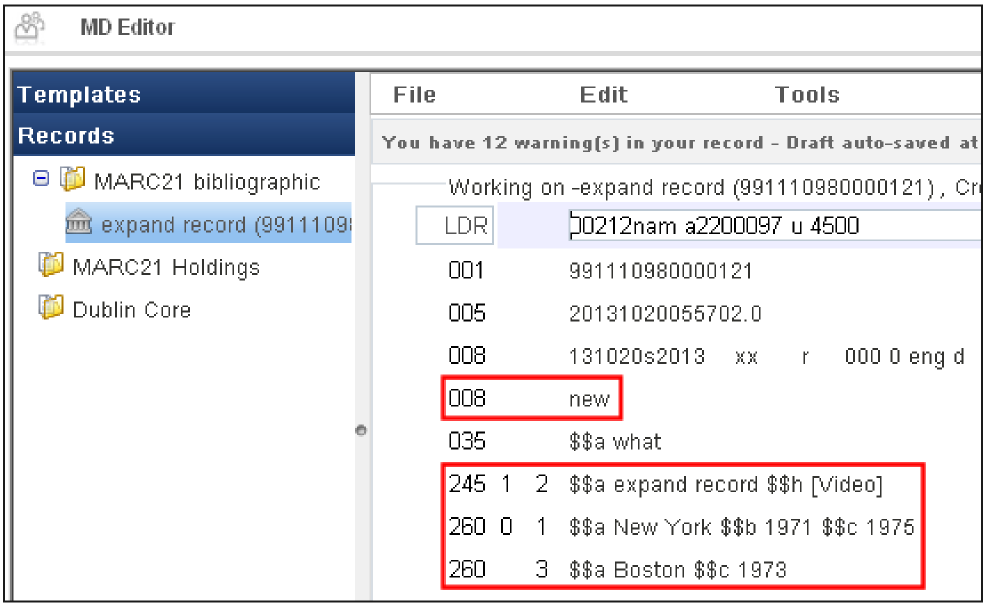


Figure 104: Example Record before Expansion

2 Click **Edit > Expand from Template** to display the Expand from Template dialog box.

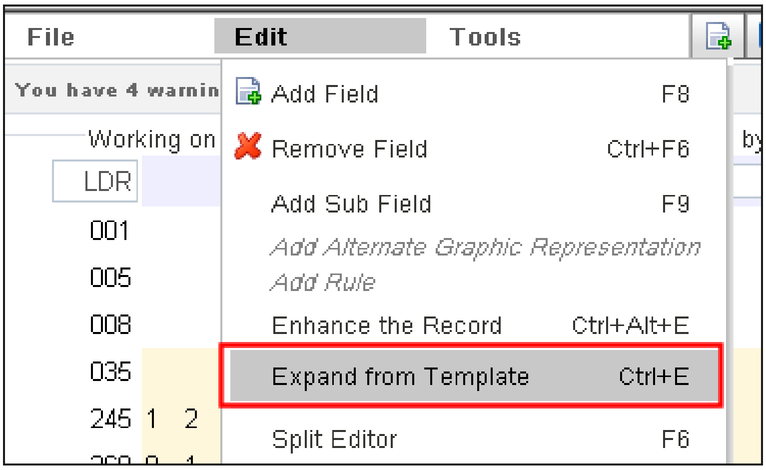


Figure 105: Expand from Template Option in Edit Menu

The following template is used for this example:

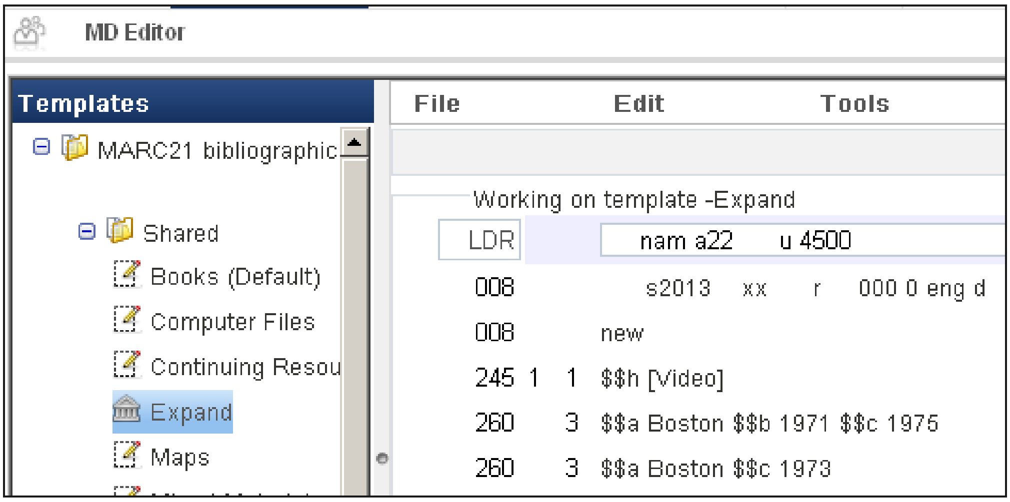


Figure 106: Example Expand Template

3 In the Expand from Template dialog box, select a template from the **Choose Template** drop-down list and click **Ok** to expand the record.

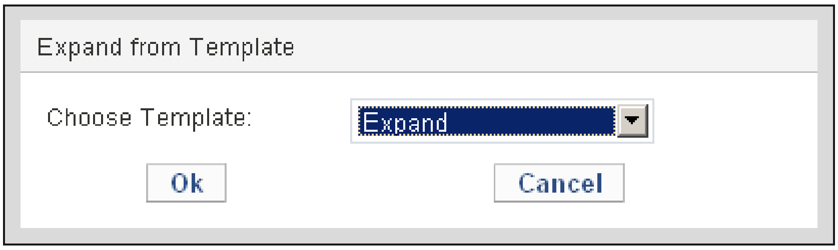


Figure 107: Expand from Template Dialog Box

The following figure shows the expanded record, which includes new 008 and 260 fields and expanded 245 and 260 fields:

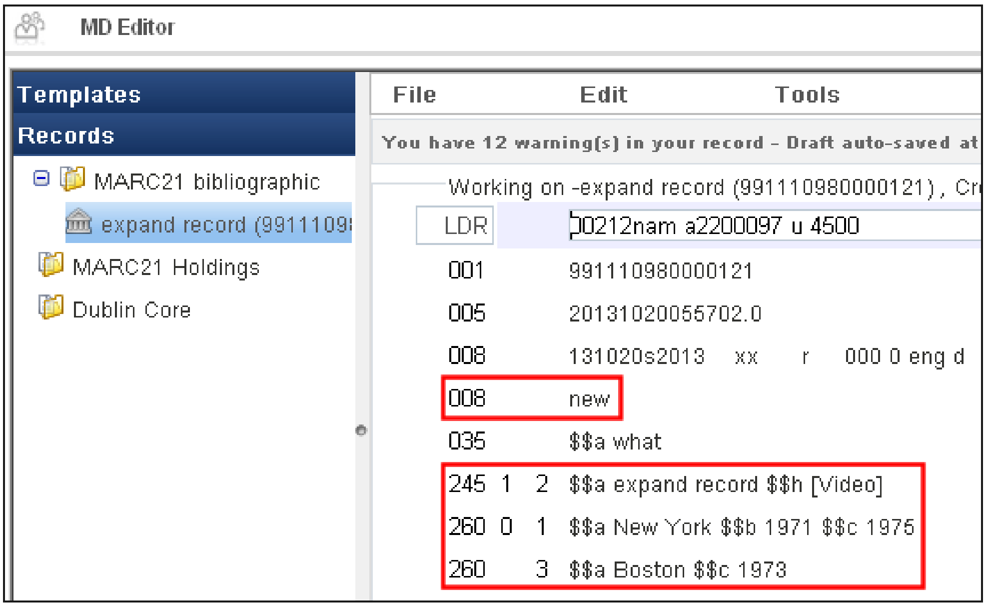


Figure 108: Example Record after Expansion

Deriving a New Bibliographic Record

The Derive New Record tool on the MARC21 Bibliographic menu in the MD Editor allows you to use the related bibliographic record and the default template as the basis to create a new record that includes either of the following types of relations:

- Host Item (773) – An analytical record that refers to a specific article in a journal that is described by another bibliographic record.
- Other Edition (775) – A record that describes other editions of the same bibliographic record.

Each of the above fields includes the following subfields, which are populated from the original related record:

- t – The original 245.a (title).
- w – A repeatable subfield that contains the 035.a subfield for each 035 field and an additional subfield that contains the original MMS ID.
- x – A non-repeatable ISSN (if it exists in 022.a). The tool uses the first occurrence only.
- z – A repeatable ISBN (if it exists in 020.a/020.e).
- g – Related parts. This is a required subfield, but it must be entered manually. The tool includes a placeholder in the field.

- p – Abbreviated title. This is a required subfield, but it must be entered manually. The tool includes a placeholder in the field.
- q – Enumeration of first page. This is a required subfield, but it must be entered manually. The tool includes a placeholder in the field.

NOTE:
The system removes empty subfields when the new holdings record is saved.

In addition, this tool includes the following fields from the original related record and combines them with fields from the default template:

- 050, 080, and 260 - Includes only the first occurrence from the original related record, but also includes other occurrences from the default template.
- 300.c - Includes all occurrences of the 300 field that have a c subfield from the original related record. Note that tool copies only the c subfield from the original related record.

To derive a new record:

1. Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
2. Specify the default template and open the related record to which you want to link.

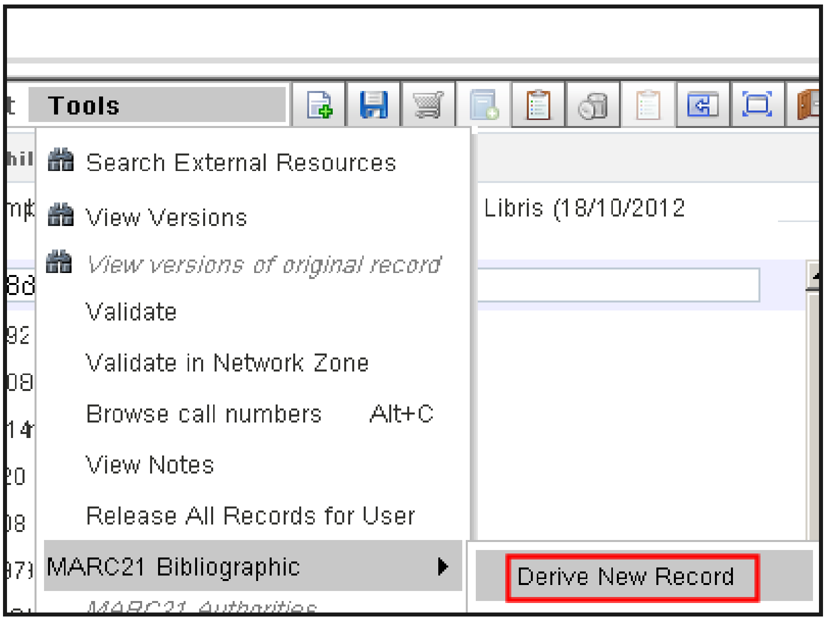


Figure 109: Select the Derive New Record Tool

3 Select **Tools > MARC21 Bibliographic > Derive New Record** to open the Derive New Record dialog box.

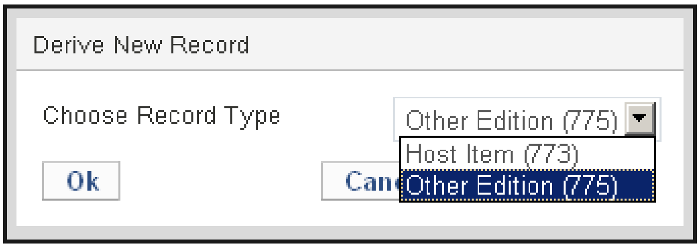
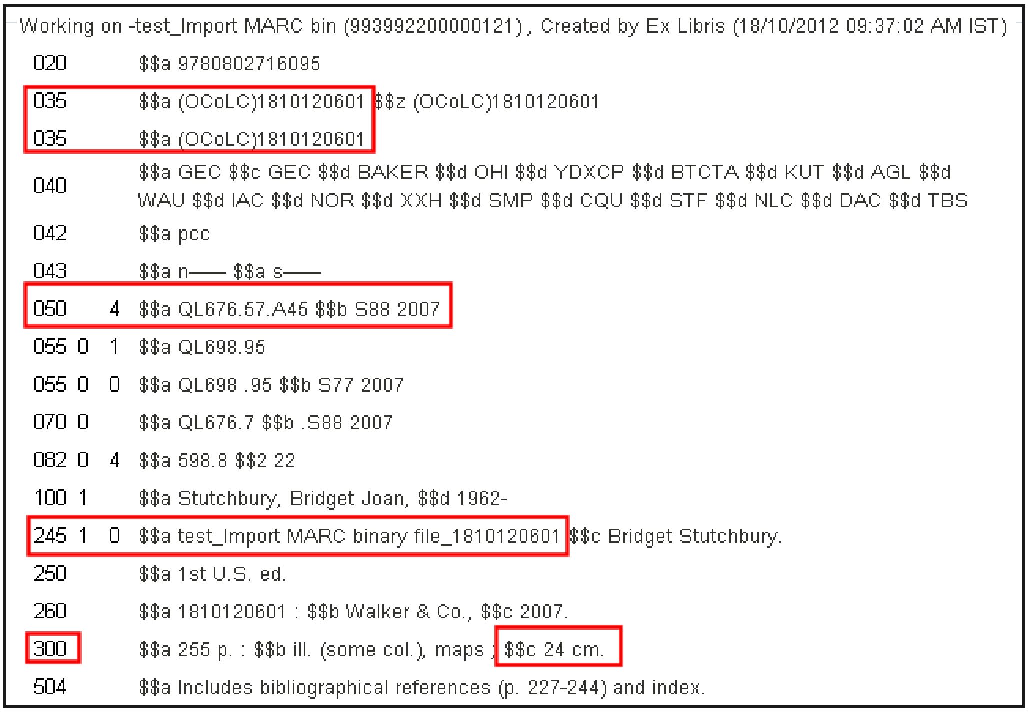


Figure 110: Select the 773 or 775 Field

4 Select **Host Item** (773) or **Other Edition** (775) from the **Choose Record Type** drop-down list and click **OK**. The derived record opens.

For example, the following figure shows the fields that were used to populate the new derived record:



Working on -test_Import MARC bin (993992200000121) , Created by Ex Libris (18/10/2012 09:37:02 AM IST)

020			$$a 9780802716095
035			$$a (OCoLC)1810120601 $$z (OCoLC)1810120601
035			$$a (OCoLC)1810120601
040			$$a GEC $$c GEC $$d BAKER $$d OHI $$d YDXCP $$d BTCTA $$d KUT $$d AGL $$d WAU $$d IAC $$d NOR $$d XXH $$d SMP $$d CQU $$d STF $$d NLC $$d DAC $$d TBS
042			$$a pcc
043			$$a n—— $$a s——
050		4	$$a QL676.57.A45 $$b S88 2007
055	0	1	$$a QL698.95
055	0	0	$$a QL698 .95 $$b S77 2007
070	0		$$a QL676.7 $$b .S88 2007
082	0	4	$$a 598.8 $$2 22
100	1		$$a Stutchbury, Bridget Joan, $$d 1962-
245	1	0	$$a test_Import MARC binary file_1810120601 $$c Bridget Stutchbury.
250			$$a 1st U.S. ed.
260			$$a 1810120601 : $$b Walker & Co., $$c 2007.
300			$$a 255 p. : $$b ill. (some col.), maps ; $$c 24 cm.
504			$$a Includes bibliographical references (p. 227-244) and index.

Figure 111: Original Related Record

The following figure shows the results of the new derived record. The non-highlighted fields are taken from the default template:

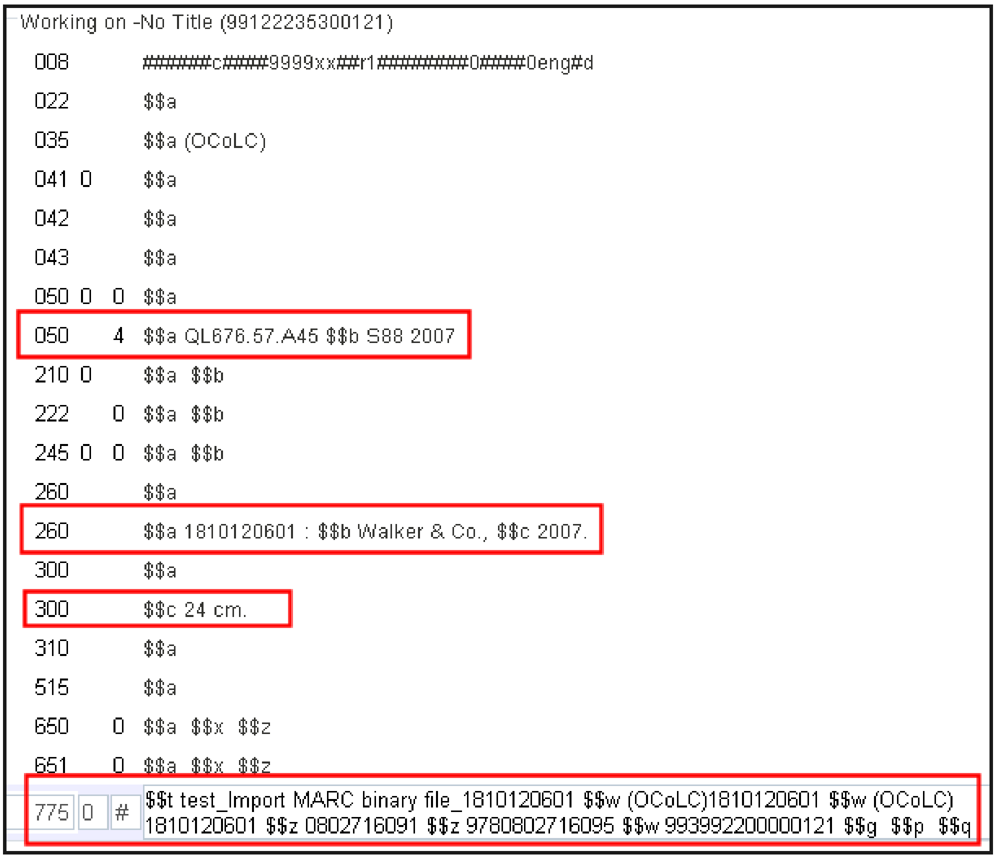


Figure 112: Derived Record Showing 775 Field and Other Derived Fields

5. Enter any additional fields and update the empty **g**, **p**, and **q** subfields in the 773 or 775 field.
6. Save your changes to the new record.

Working with Bibliographic Records

There are many ways that Alma enables you to create, edit, and delete bibliographic records. This provides you with the flexibility to customize workflows to gain the most efficiency for managing your Alma repository.

The Alma repository can contain bibliographic records that represent physical, electronic, and digital resources. Using the Alma Metadata Editor, you can manually create bibliographic records for these resources (refer to **Creating Bibliographic Records** on page **173** for more information).

You can also create bibliographic records automatically using Alma processes for importing bibliographic data that comes from other sources in files that are external to the Alma system. For more information, refer to **Managing Profiles for Record Imports** on page **511**. Additional information related to working with bibliographic records from external resources can be found in **Resource Management** on page **29** in Alma Integrations With External Systems.

The Community Zone is another component of Alma that can be used for quickly identifying resources and linking them to your local repository.

VIDEO:

For more information about the Community Zone, see the *Alma Community Zone Intro and Task List* video (14:10 mins).

If your Alma system is part of a collaborative network environment, common bibliographic records can be created and link throughout the network. For more information, refer to **Working with Collaborative Networks (Consortia) in Alma** on page **3** in the Working With Collaborative Networks in *Alma Guide*.

Given the dynamic nature of your repository for adding, deleting, and modifying resources, Alma provides the tools needed for managing your bibliographic records. Refer to **Managing Bibliographic Records** on page **178** regarding these capabilities.

Creating Bibliographic Records

Alma provides the MD Editor for creating individual bibliographic records. To customize the process of entering bibliographic records, you can use a template that you tailor to your needs (refer to **Working with Templates** on page **181** for more information).

To create a bibliographic record:

1. From the Alma main menu, click **Open Metadata Editor**.
2. Click **File > New > MARC21 Bibliographic**.

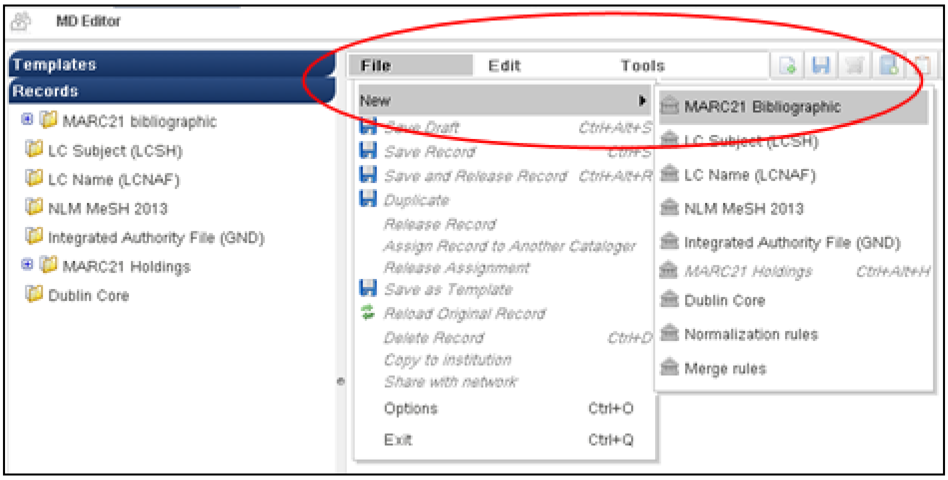


Figure 113: File > New > MARC21 Bibliographic

The MD Editor opens a template for entering your bibliographic record.

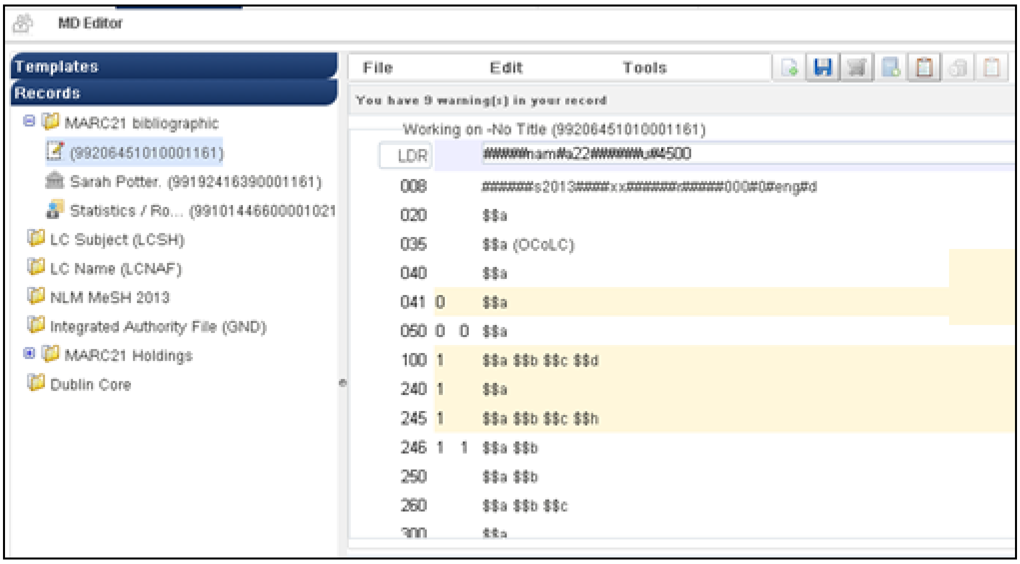


Figure 114: Bibliographic Record Template

3 Enter the data for your bibliographic record. Refer to the section **MD Editor Menu and Toolbar Options** on page **155** for additional information regarding working with the MD Editor.

When entering the following fields, the system provides pop-up assistance:

- 260$a
- 260$b
- 260$e

- 260$f
- 505$r
- 505$t
- 561$a

The pop-up assistance displays after you have typed the first three characters (refer to the illustration below).

IMPORTANT:
The pop-up assistance provided for these fields is not suggested authority/bibliographic headings.

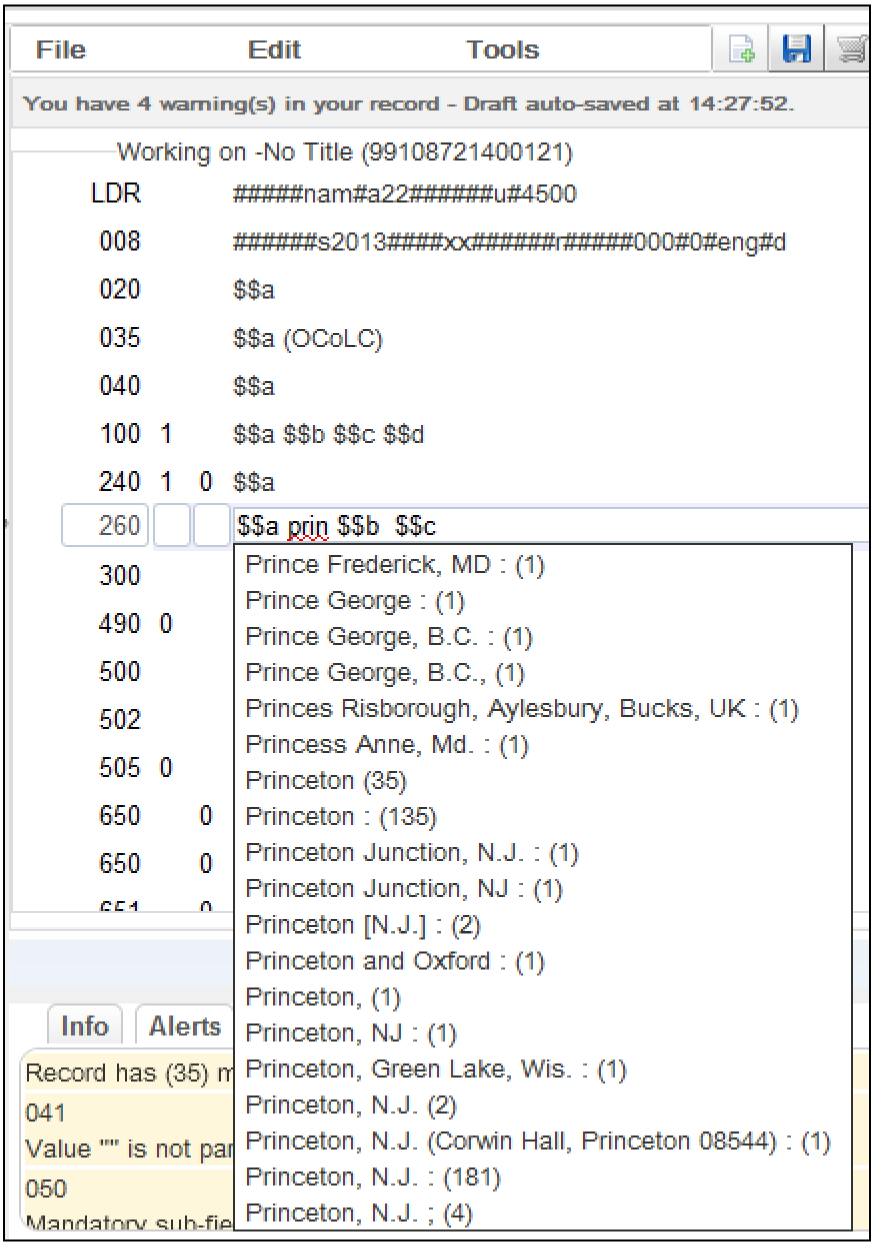


Figure 115: Pop-up Assistance Example (Not Suggested Headings)

To access suggested authority and bibliographic headings, press F3 from the field that you are entering/checking. The system opens a list of options from which to choose. If no headings suggestions are available, Alma displays **No matching headings found**.

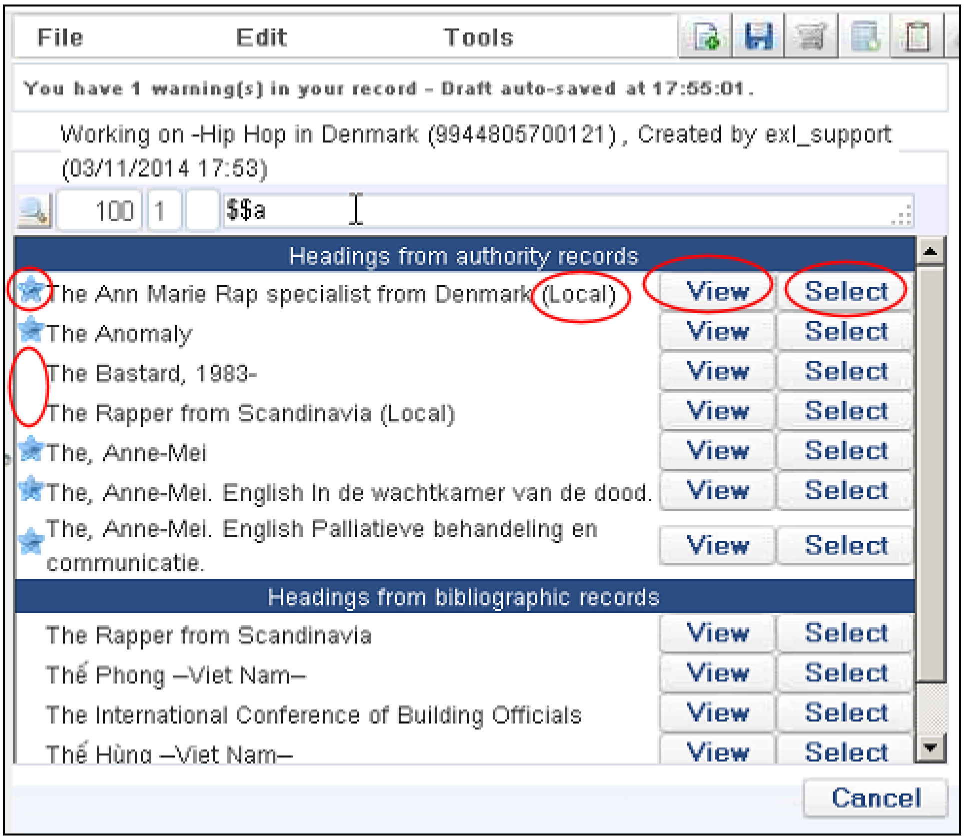


Figure 116: F3 Example - Suggested Authority and Bibliographic Headings

Local authorities are identified with the word (Local) in parentheses.

Preferred terms are identified with a star. Non-preferred terms are blank at the left (the absence of a star).

Click **View** to display the entire authority record.

Click **Select** to insert the content into the record on which you are working.

For additional information, refer to **Working with Authority Records** on page **184**.

4 Click the **Save** icon. For additional information regarding saving records, refer to **Saving Records in the MD Editor** on page **164**.

NOTE:
If you edit a field in an existing record that is related to another field in another record, the link between the records is broken when you save the edited record. Alma must run the MMS - Build Record Relations job (**Administration > Manage Jobs > Monitor Jobs – Scheduled** tab) in order for the link to be recreated. If you edit a field that is not related to a field in another record, the link between the records remains intact.

Managing Bibliographic Records

Alma provides the capability to manage bibliographic records using a combination of record sets (refer to **Adding and Modifying Sets** on page **84**) and Alma-provided processes (refer to **Overview of Jobs** on page **285** in the *Alma Administration Guide*). For information on deleting bibliographic records, refer to **Batch Deleting Bibliographic Records** on page **178**.

Sometimes, you may find it helpful to modify your records with tools external to Alma. To address this requirement, Alma provides a **Tools** feature in your search results that allows you to export records to an Excel spreadsheet. Refer to **Using the Portfolios List** on page **73** for a description of the options **Extended Export** (to Excel) and **Excel (current view)**.

Batch Deleting Bibliographic Records

With the appropriate permissions, you can batch delete bibliographic records that are not connected to orders or other records in the database (optional), and, for collaborative networks/network zone records, are not linked to other members' records. You can also choose whether you want to delete the inventory associated with these records. For more information and instructions, see **Running the Batch Delete Job** on page **178**.

Sets for the batch delete process can be saved from an **All titles** repository search. Records that cannot be deleted due to one of the conditions described above are identified in the job report (see **Job Reports** on page **180**).

Running the Batch Delete Job

PERMISSIONS:

To run a batch delete job on bibliographic records, you must have one of the following roles:

- Cataloger Administrator
- Cataloger Manager

To run the batch delete job:

1. On the Create Job - Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select the **Withdraw** filter option or use the quick search (**Find**) feature and the search term **delete**.
2. From the filtered process list, select **Delete bibliographic records** and click **Next**.

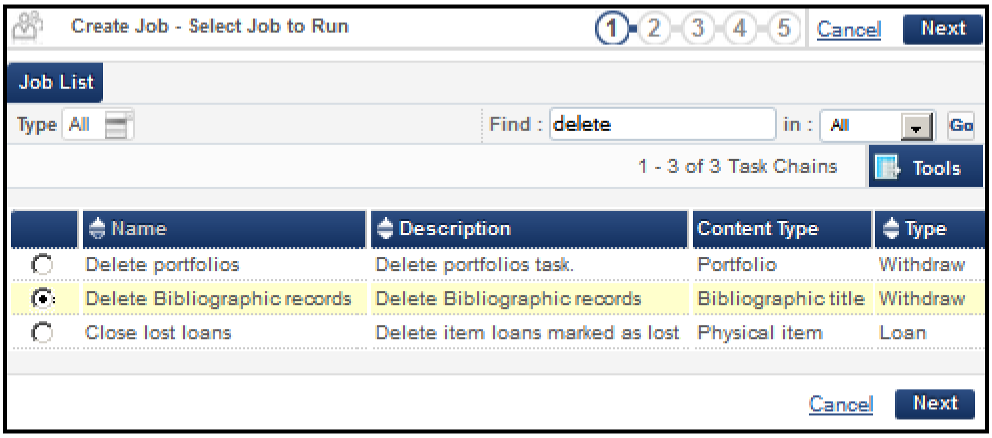


Figure 117: Delete Bibliographic Records Process Option

3 From the Create Process – Select Set page, select the set that you previously created for the delete process and click **Next**.

Step 3 of the wizard, Enter Task Parameters, opens.

Figure 118: Delete Bibliographic Records Task Parameters

4 Select the **Do not delete if related to other records** check box if you want to keep records that are related to other records in the database. To allow these records to be deleted, leave the check box blank.

5 Select the **Delete all associated inventory resources** check box if you want to delete the inventory associated with the bibliographic records that are being deleted.

6 Click **Next.**

7 Enter a process name, select the schedule, and click **Next**.

The Review and Confirm page opens.

Figure 119: Create Process - Review and Confirm Page

8 Review the information provided on the Create Process – Review and Confirm page. To make corrections, use the **Back** link to get access to the page containing the change you want to make. When the job is correct, click the **Submit** button.

Alma takes you to the Running tab of the Monitor Jobs page. Your job should appear there, unless it ran very quickly or you scheduled it to run at a later time. Click the **Refresh** button to check the progress.

Job Reports

When a job finishes running, its entry listing moves from the Running tab to the Completed tab. You can view a report of it by finding it in the Completed tab, then, in its row, selecting **Actions > Report**.

The job report includes counts for the following and an option to download a detailed Excel file (refer to the illustration below) of the report (with MMS IDs):

- Deleted bibliographic records
- Bibliographic records with inventory
- Bibliographic records with POs
- Bibliographic records related to other records
- Bibliographic records linked to collaborative network members' records

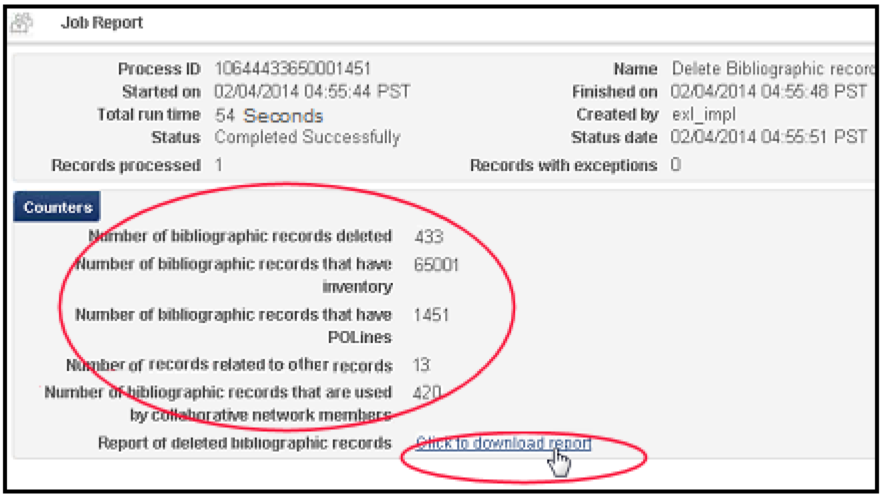


Figure 120: Batch Delete Report Counts

To see the report of deleted bibliographic records for this job—including, for collaborative network users, a list of your institutions that are associated with retained records—click the **Click to download report** text.

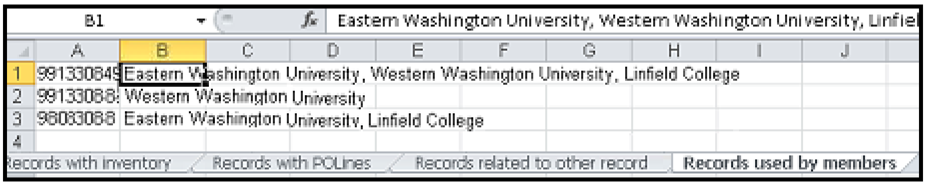


Figure 121: Excel Report Including which CN's Institutions Using Which Records

Working with Templates

The MD Editor enables catalog managers to create templates in which they can predefine the fields that they want to be included, by default, in original cataloging records. Catalogers are thus able to increase their productivity by working more efficiently with these predefined templates.

New templates can be created from existing records or from existing templates. Templates may be shared among catalogers or private. When you view the shared template of another cataloger, the template appears with a Draft icon. Currently, you can only edit the shared templates that you created yourself, but you cannot edit the shared templates that were created by someone else.

NOTE:
Out-of-the-box default templates cannot be edited or deleted.
For default templates (templates that have the **Draft** icon), only the **New**, **Duplicate**, and **Properties** options are available.

To access existing templates:

1 On the MD Editor page (**Resource Management** > **Cataloging > Open Metadata Editor**), click the **Templates** tab in the left panel. The MD Editor Templates tab opens.

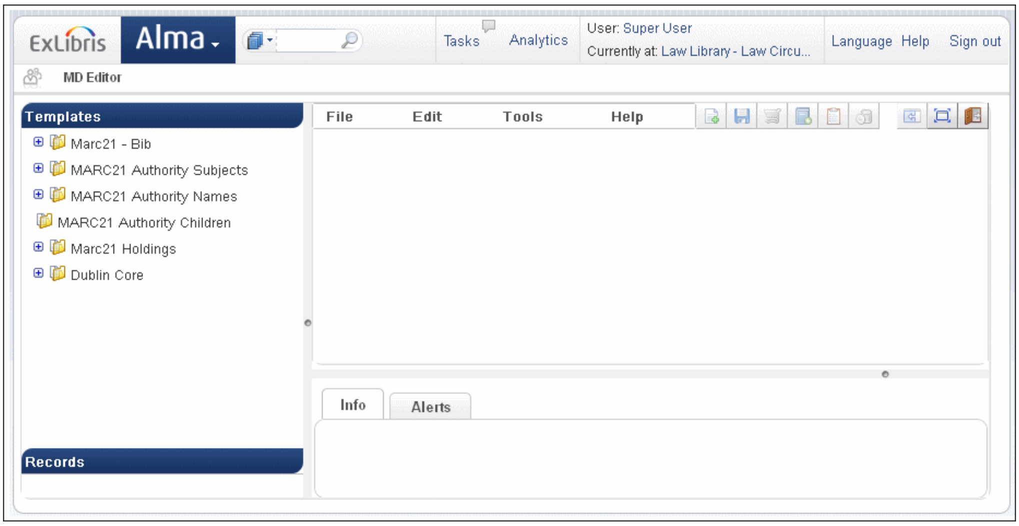


Figure 122: MD Editor Page Templates Tab

2 Open the required folder (for example, MARC21 - Bib) and browse to the template you want to access.

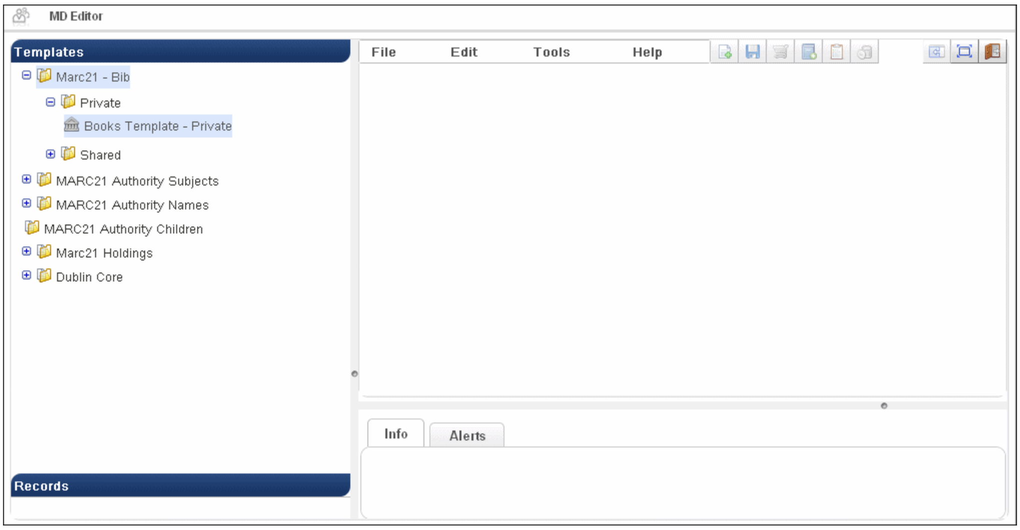


Figure 123: MD Editor Page Templates Tab Template Selected

3 Click the template and choose one of the following options:

- **New Record** – Opens a new record in the MD Editor based on the selected template.
- **Edit** – Enables you to edit the template.

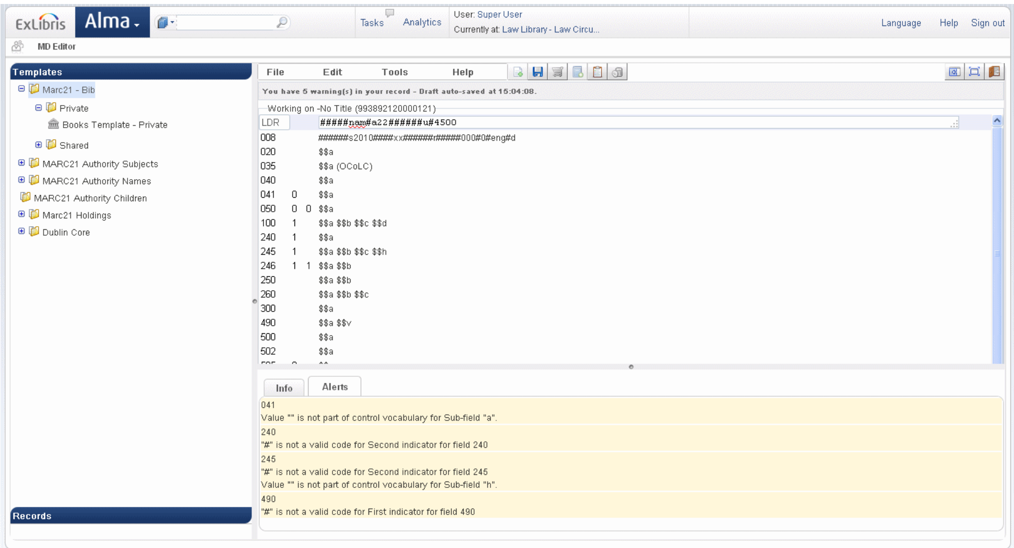


Figure 124: MD Editor Page Templates, Edit Record

NOTE:
In the above example, the **Alerts** tab lists the fields that contain errors and require editing.

- **Delete** – Click **Yes** to confirm that you want to delete the template.
- **Duplicate** – Duplicates the selected template enabling you to modify and save it as a new template without affecting the original template. Before duplicating the record, the Template Properties dialog box opens enabling you to define the properties of the new template.

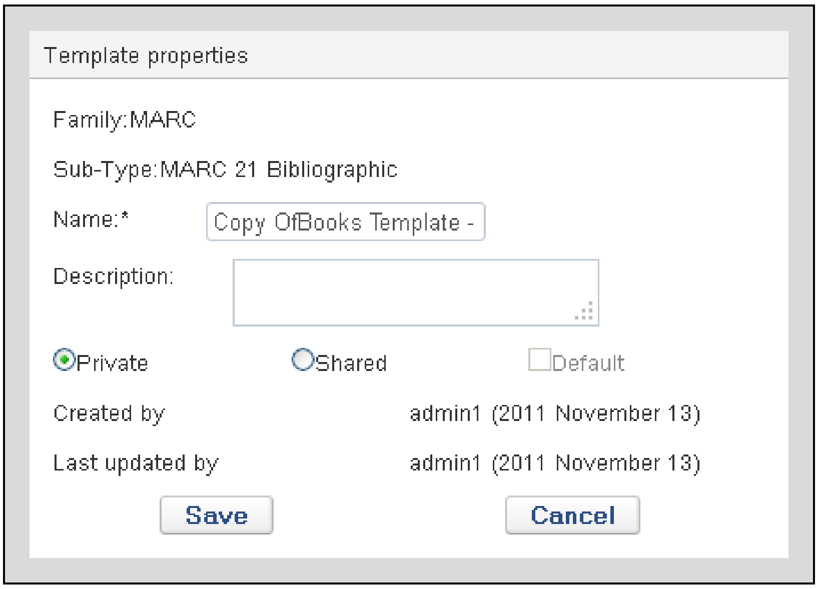


Figure 125: Template Properties Dialog Box

Enter a **Name** (required field) and **Description** for the template and specify **Private** or **Shared**. If you select **Shared** and want the template to serve as the default template for newly created records, select **Default**. Click **Save** to save the new template.

- **Properties** – Enables you to modify the template properties (see **Figure 125**).

Working with Authority Records

Alma provides a set of authority records that are updated and maintained regularly by Ex Libris in the Community Zone (CZ). Alma maintains the following vocabularies:

- LC Subject (LCSH) – Library of Congress Subject Headings (updated weekly)
- LC Name (LCNAF) – Library of Congress Name Authority File (updated weekly)
- NLM MeSH – United States National Library of Medicine Medical Subject Headings (updated as available)

- Integrated Authority File (GND) – German National Library - Subjects and Names Authorities (updated weekly)
- BARE (Norwegian Authority System) – BIBSYS Authority Registry - Subjects and Names Authorities (initial load performed, currently not updated)

  Refer to **Working with Norwegian Authority System (BARE) Records** on page **212** for more information.

NOTE:
Multiple subject authorities can be used by Alma, but only one type of names authority can be used. For example, if Alma is defined to use LC_Names, it cannot also use GND names authorities.

If local authorities are enabled for your institution (must be enabled by Ex Libris Support), you can create local authority records, which override the global authority records provided with Alma in the CZ. For more information, refer to **Creating Local Authority Records** on page **190**.

Alma runs the following processes automatically every day to authorize the bibliographic records in your catalog:

- **Authorities - Handle local record authority updates** – If local authority functionality is enabled (must be enabled by Ex Libris Support), this process uses all recently updated local authority records to mark all non-linked bibliographic headings that are a match to them. The marked headings are then linked to the authority records via the **Authorities - Link BIB Headings** process.
- **Authorities - Link bibliographic headings** – This job searches all authority record fields, including subdivision fields, for complete terms listed in bibliographic records (giving priority to local authorities, if enabled). If exact matches are found, the bibliographic records are linked to the corresponding authority records. If exact matches are not found, the subdivision fields are disregarded, a search of all authority records is performed once again, and the bibliographic records are linked to the matching authority records that are located during the second search.
- **Authorities - Preferred term correction** – This job performs preferred term correction on all biliographic records that are linked to authority records via the **Authorities - Link bibliographic headings** job. For example, if a bibliographic record contains the non-preferred term “Narcotics, Control of,” and the associated authority record contains the preferred term “Drug control,”the Authorities – Preferred Term Correction job replaces “Narcotics, Control of” with the preferred term “Drug control.” Note that bibliographic records are also updated with any subsequent updates to authority records.

  For customers in implementation, the **Authorities - Preferred Term Correction** job will be enabled by default upon "Go Live." For customers currently in production, this job is disabled by default. To enable it, you must set the `disable_preferred_term_correction_job` parameter (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**) to **false**. Subsequently, access the Scheduled tab of the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**) and confirm that the **Authorities - Preferred Term Correction** job is active (yellow check mark in the Active column).

IMPORTANT:

The **Authorities - Preferred Term Correction** job does not handle preferred term correction on records retroactively. It handles preferred term correction only for authority record updates and link updates that occur after the **Authorities - Preferred Term Correction** job is enabled.

For a list of punctuation rules that are implemented when bibliographic records are updated from the authority database, see **Punctuation Rules for Updated Bibliographic Records** on page **210**.

To view the details of a completed job, see **Viewing Job Reports for Authority Processes** on page **207**.

Additional information provided in this section includes:

- Local authorities in Alma
  - **Creating Local Authorities** on page **187**
  - **Creating Local Authority Records** on page **190**
    - **Creating Local Authority Records Using the MD Editor** on page **191**
    - **Creating Local Authority Records Using an Import Profile** on page **193**
  - Deleting local authorities using the **Delete local authority records** job – see **Table 18** in the *Alma Administration Guide*.
  - Export a set of local authorities using the **Export Authority records** job – see **Table 18** in the *Alma Administration Guide*.
  - **Performing Global Changes on Locally Managed Authority Records** on page **197**
- **Managing Authority Records in the MD Editor** on page **202**
- **Viewing Job Reports for Authority Processes** on page **207**
- **Punctuation Rules for Updated Bibliographic Records** on page **210**
- **Handling Deleted Authorities During Metadata Imports** on page **212**
- **Working with Norwegian Authority System (BARE) Records** on page **212**
- **Using Originating System IDs for Linking Bibliographic Records to Authority Records** on page **215**

VIDEO:

Learn about how to show authority records in the MD Editor in the *Show Authority Records in MD Editor* video (3:27 mins).

Creating Local Authorities

In Alma, you can create local authorities or vocabularies to use when entering authority records with the MD Editor or importing authority records using an import profile.

NOTES:

- In order to use local authorities in Alma, Ex Libris Support/your Ex Libris Professional Services representative must enable local authority functionality for your institution.
- Multiple subject authorities can be used by Alma, but only one type of names authority can be used. For example, if Alma is defined to use LC_Names, it cannot also use GND names authorities. Thus, you should define only one type of **Name** or **Names and Subjects** local vocabulary. For information on the code to be used for the defined names authority, see the **Code** entry in **Table 23** below.

To create a local authority (vocabulary):

1. On the Resource Management Configuration page (**Resource Management > Configuration > Configuration Menu**), click **Metadata Configuration** in the Cataloging section. The Metadata Configuration List page displays.
2. Click **Manage Local Authorities**.
3. Click **Add Local Authority**. The Add Local Authority dialog box displays.

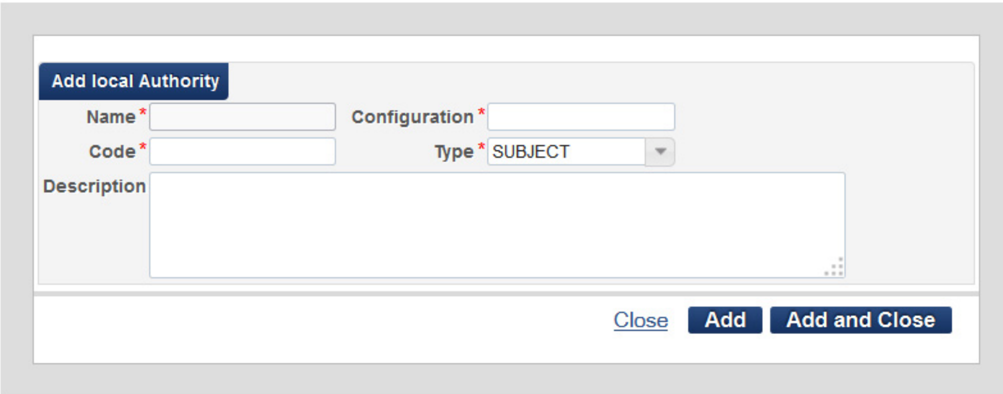


Figure 126: Add Local Authority Dialog Box

4 Complete the information on the **Add Local Authority** dialog box (see the table below for more information).

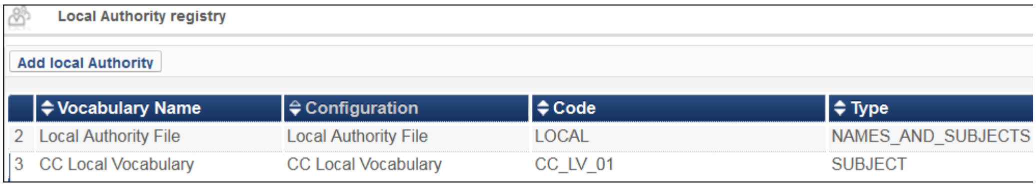
Table 23. Add Local Authority Dialog Box

Parameter	Description
Name	Enter a name to identify this local authority. This name displays in the **Vocabulary Name** column on the Local Authority Registry page where you can select the row actions to edit and delete the local vocabularies that you have created.
Configuration	Enter a name to identify this local authority on the Metadata Configuration List page. This name displays in the **Configuration** column on this page and on the Local Authority Registry page. This name also displays in the MD Editor where you enter your local vocabulary terms.
Code	Enter an identifying code for this local authority that displays in the **Vocabulary** column on the Metadata Configuration List page, the **Code** column on the Local Authority Registry page, and the **Vocabulary code** drop-down list on the Import Profile Details page for authority profiles. If the authority indication is in the bibliographic record's second indicator 7, subfield 2, the code must match what is in this subfield 2. This is relevant for **Subject** and **Names and Subjects** types of local authorities. For the **Name** type of local authority (of which only one should be created – see the note above, at the beginning of this section), the code must match the **authority_names** customer parameter value that was entered for your institution by Ex Libris staff. If you are unsure of the defined value for this parameter, contact an Ex Libris representative.
Type	Select from the following options available in the drop-down list: ■ Subject ■ Name ■ Names and subjects **NOTE:** No more than one name type of local vocabulary should be created.

Table 23. Add Local Authority Dialog Box

Parameter	Description
Description	Use this option to more fully identify the local authority that you are creating.

5 Click **Add and Close**. The local authorities vocabulary that you created displays on the Local Authority Registry page.



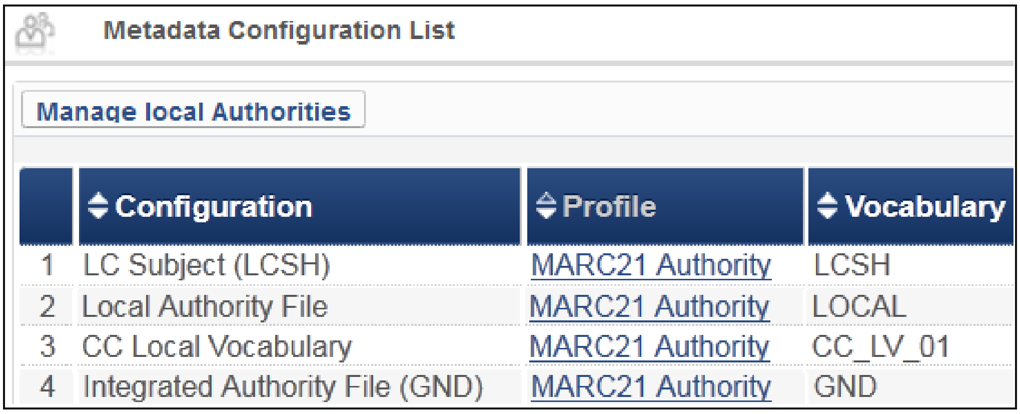
Local Authority registry

Add local Authority

	Vocabulary Name	Configuration	Code	Type
2	Local Authority File	Local Authority File	LOCAL	NAMES_AND_SUBJECTS
3	CC Local Vocabulary	CC Local Vocabulary	CC_LV_01	SUBJECT

Figure 127: Local Authority Registry Page

6 Click **Save**. The local authorities vocabulary configuration that you created displays on the Metadata Configuration List page.



Metadata Configuration List

Manage local Authorities

	Configuration	Profile	Vocabulary
1	LC Subject (LCSH)	MARC21 Authority	LCSH
2	Local Authority File	MARC21 Authority	LOCAL
3	CC Local Vocabulary	MARC21 Authority	CC_LV_01
4	Integrated Authority File (GND)	MARC21 Authority	GND

Figure 128: Metadata Configuration List Page

You can now manually enter local authority records or import local authority records using the local authority profile that you configured (see **Creating Local Authority Records** on page 190 for more information). The local vocabulary that you created displays in the MD Editor **File > New** options and in the Import Profile Details **Vocabulary code** drop-down list.

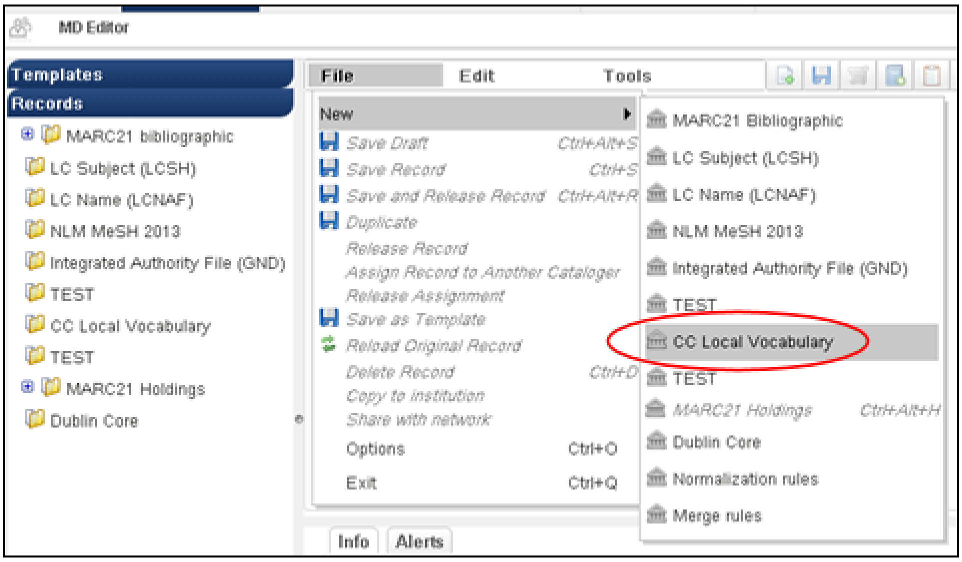


Figure 129: Create Local Authority Record

Creating Local Authority Records

You can create local authority records by:

- Using the MD Editor (see **Creating Local Authority Records Using the MD Editor** on page **191**)
- Using an import profile (see **Creating Local Authority Records Using an Import Profile** on page **193**)

NOTES:

- In order to use local authorities in Alma, Ex Libris Support/your Ex Libris Professional Services representative must enable local authority functionality for your institution.
- To create a local authority record (either via the MD Editor or via an import profile) for an authority vocabulary that exists in the Community Zone (CZ), you must first create this local authority (vocabulary) in your institution if it does not already exist. For example, if the CZ has a defined authority (vocabulary) for REO, but is missing a specific authority record that you want to create locally, before you create the authority record locally, you must ensure that the local authority (vocabulary) for REO exists in your institution. For information on creating local authorities (vocabulary), see **Creating Local Authorities** on page **187**.
- You can delete local authorities using the **Delete local authority records** job – see **Table 18** in the *Alma Administration Guide*.

Creating Local Authority Records Using the MD Editor

When you want to create a single local authority record, you can use the MD Editor.

To create a local authority record:

1. Open the MD Editor (**Resource Management** > **Cataloging > Open Metadata Editor**).
2. Click **File > New** and select from the list of local vocabularies that have been created/implemented for your system (see **Creating Local Authorities** on page 187, or if the local authority vocabulary is an extension of a global one, it appears here automatically as an option with no predefinition required), such as:
   - (local) **LC Subject (LCSH)**
   - (local) **LC Name (LCNAF)**
   - (local) **NLM MeSH 2013**
   - (local) **Integrated Authority File (GND)**

NOTE:
Multiple subject authorities can be used by Alma, but only one type of names authority can be used. For example, if Alma is defined to use LC_Names, it cannot also use GND names authorities. For more information, see **Creating Local Authorities** on page **187**, **Table 23**.

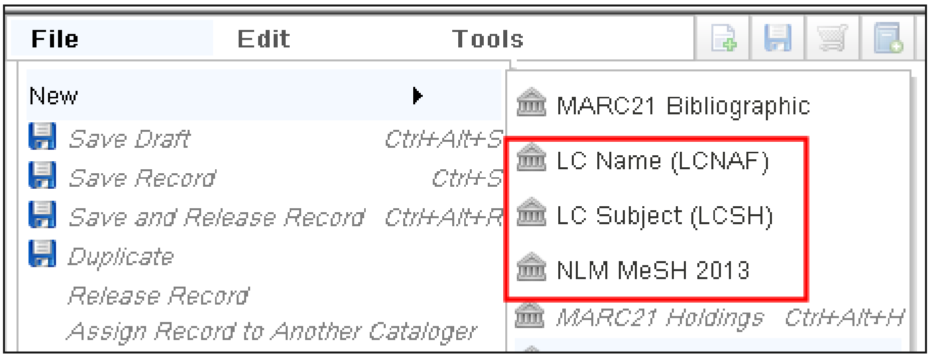


Figure 130: Create New Local Authority Records (Select Vocabulary)

3. Choose a template (see **Working with Templates** on page **181**) and enter the authority record data/terms.

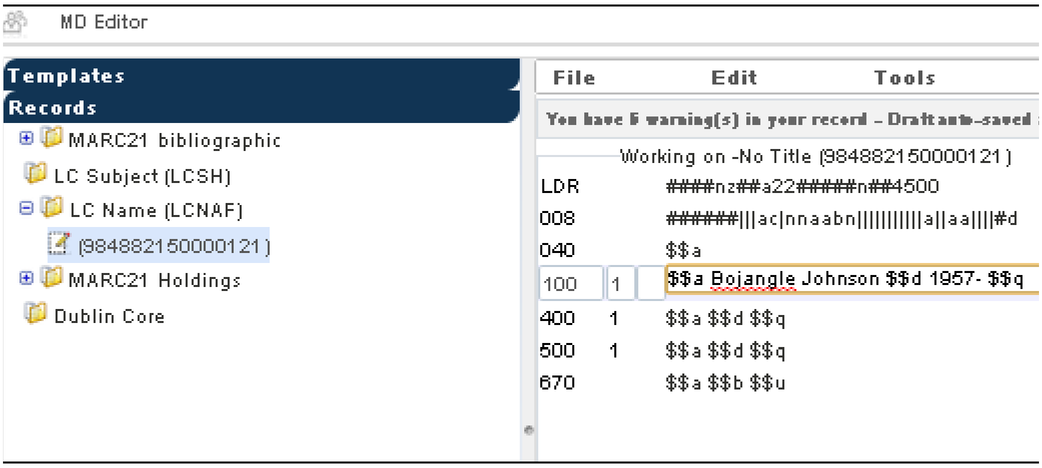


Figure 131: Local Authority Record Data Entry

4 Click **File > Save and Release Record**.

You can view the record you entered using an Authorities search.

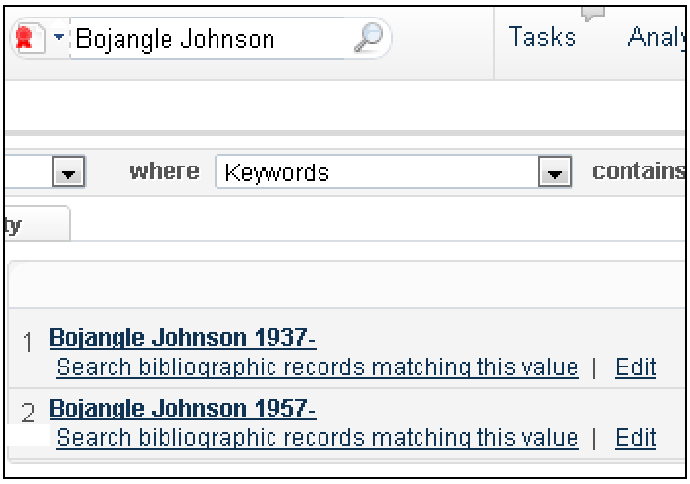


Figure 132: Local Authority Record Search

You can now create a bibliographic record that uses the local authority record/terms that you created/saved. Preferred terms are marked with a star as shown in the figure below.

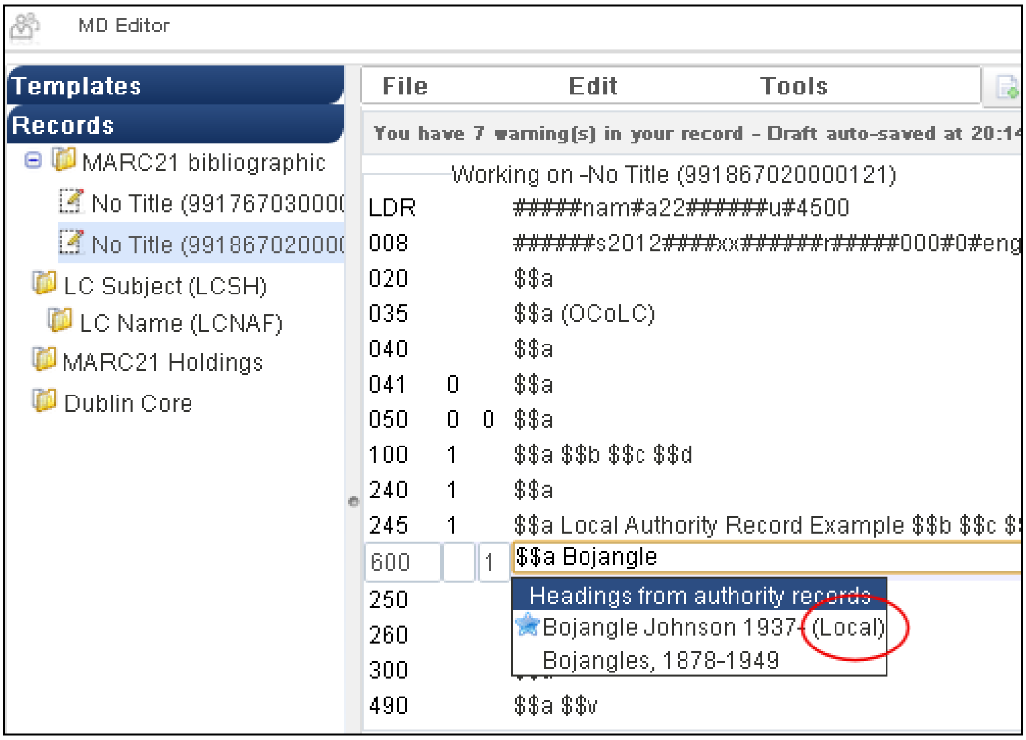


Figure 133: New Bibliographic Record Linking to the Local Authority Record You Created

NOTE:

If you select a non-preferred term, the MD Editor will automatically populate the bibliographic record with the preferred term.

Creating Local Authority Records Using an Import Profile

When you want to create multiple local authority records, you can create and process an authority import profile.

NOTE:

Multiple subject authorities can be used by Alma, but only one type of names authority can be used. For example, if Alma is defined to use LC_Names, it cannot also use GND names authorities. For more information, see **Creating Local Authorities** on page **187**). **Table 23**.

To create local authority records using an import profile:

1 On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles)**, click the **Add New Profile** button. The Import Profile Details page displays.

2 For the profile type, select **Authority** or **Initial Authority** to import authority records.

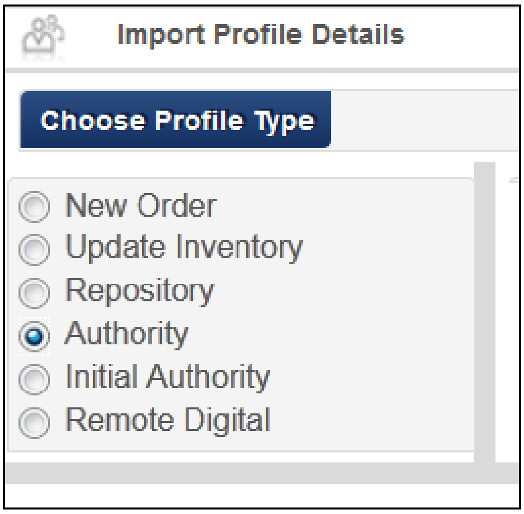


Figure 134: Select Import Profile Type (for Authority Records)

In general, the **Authority** option is selected for ongoing authority record updates; and the **Initial Authority** option is for your initial load of local authority records (when only loading and no normalization or matching is required).

NOTE:
In order to use local authorities in Alma, Ex Libris Support/your Ex Libris Professional Services representative must enable local authority functionality for your institution.

3 Click **Next**. The Import Profile Details page displays.

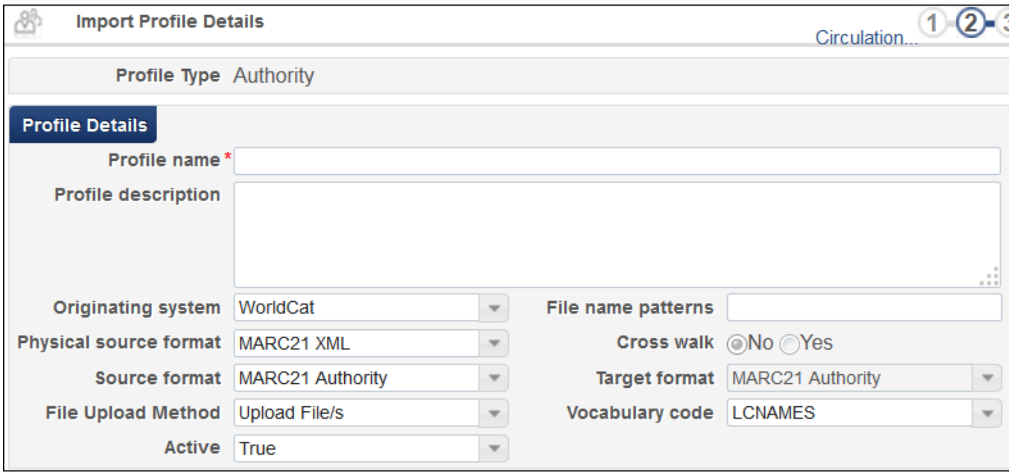


Figure 135: Import Profile Details Page - Authority Profile Type

4 Enter the profile details. Note that the **Vocabulary code** drop-down list contains a list of local authorities that have been created/implemented for your system (see **Creating Local Authorities** on page **187**, or if the local authority vocabulary is an extension of a global one, it appears here automatically as an option, with no predefinition required).

If you choose to create MARC21 XML files (for your source), use the standard MARC21 XML format as shown below.

```
<?xml version="1.0" encoding="UTF-8"?>
<collection xmlns="http://www.loc.gov/MARC21/slim">
  <record xmlns="http://www.loc.gov/MARC21/slim">
    <leader>00096nam a2200049 i 4500</leader>
    <controlfield tag="003">EXL</controlfield>
    <datafield tag="245" ind1="0" ind2="0">
      <subfield code="a">bibliographic record sample</subfield>
    </datafield>
    <datafield tag="949" ind1="0" ind2="0">
      <subfield code="a">1234</subfield>
    </datafield>
  </record>
  <record xmlns="http://www.loc.gov/MARC21/slim">
    <leader>00096nam a2200049 i 4500</leader>
    <controlfield tag="003">EXL</controlfield>
    <datafield tag="245" ind1="0" ind2="0">
      <subfield code="a">bibliographic record sample2</subfield>
    </datafield>
    <datafield tag="949" ind1="0" ind2="0">
      <subfield code="a">12345</subfield>
    </datafield>
  </record>
</collection>
```

5 Click **Next**.

6 Select the normalization and validation options as needed.

Figure 136: Normalization and Validation Options

NOTE:

The normalization and validation options do not display when the **Initial Authority** profile type is selected. By design, this provides the benefit of faster processing for the typically larger initial loads.

7 Click **Save**. Your import profile is saved and displays on the Run Import page.

8 For the profile you created, select **Actions > Run Import**.

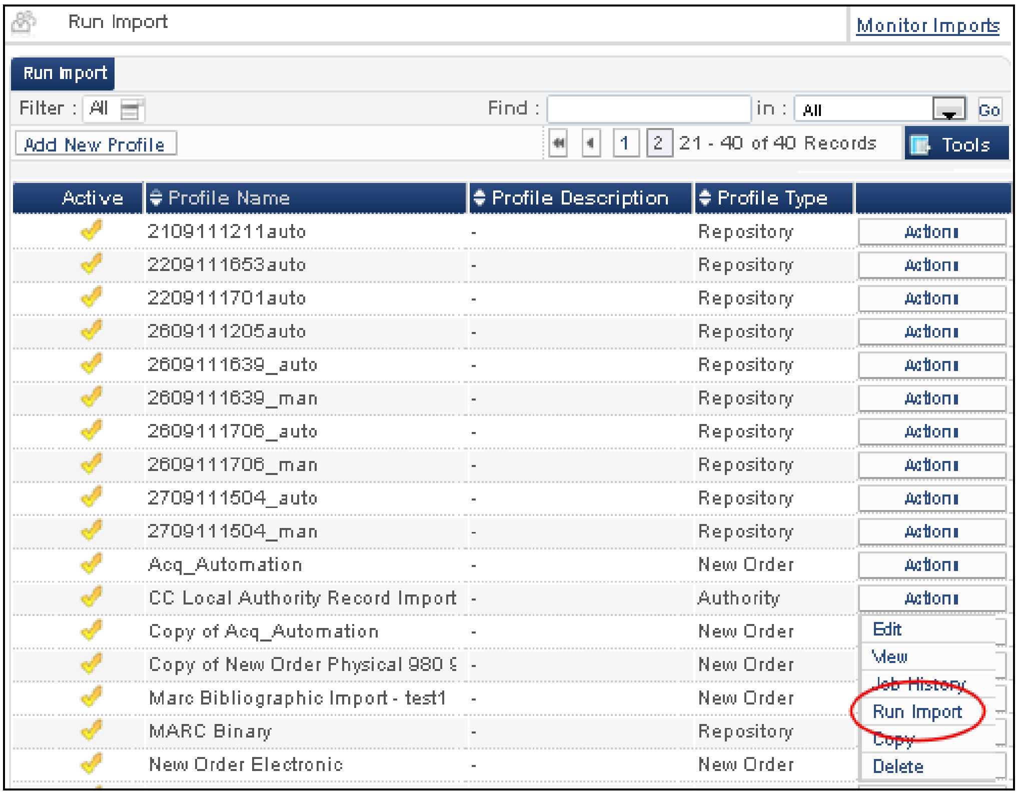


Figure 137: Run Import

9 Enter the name of the file to be imported and click **Add** and **Submit** the job to run.

For additional information regarding import profiles, refer to **Configuring New Import Profiles** on page **512**.

Performing Global Changes on Locally Managed Authority Records

Alma provides support for making global changes to locally managed authorities. This capability is implemented using Drools-based rules similar to the Alma capability available for MARC 21 bibliographic normalization jobs.

To create the Drools-based rule for local authority normalization:

1. Open the Metadata List Configuration page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration**).

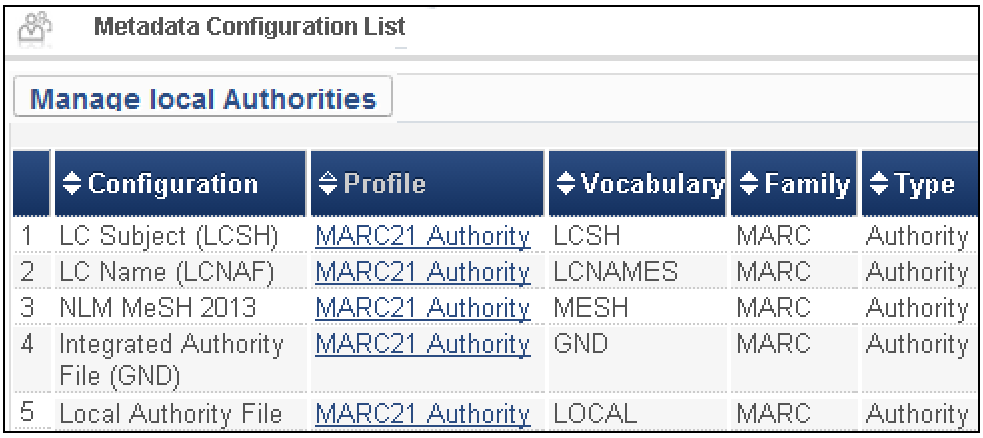


Figure 138: Locally Managed Authority Configuration

2. Click the **MARC21 Authority** link for the local authority for which you want to create a Drool-based normalization rule. The Fields tab of the Profile Details page opens.
3. Select the **Normalization Processes** tab.

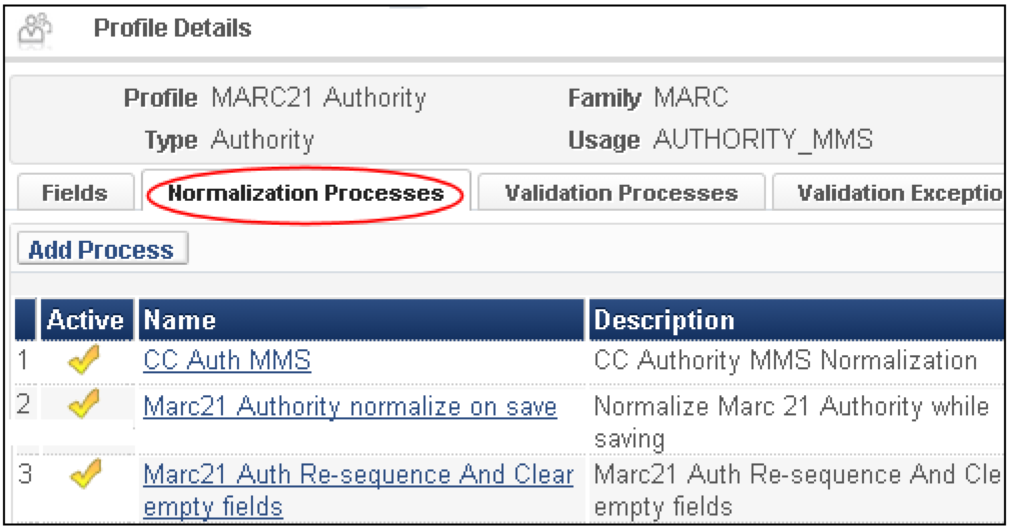


Figure 139: Normalization Processes Tab

4. Click **Add Process**. The Process Details wizard step 1 page opens.

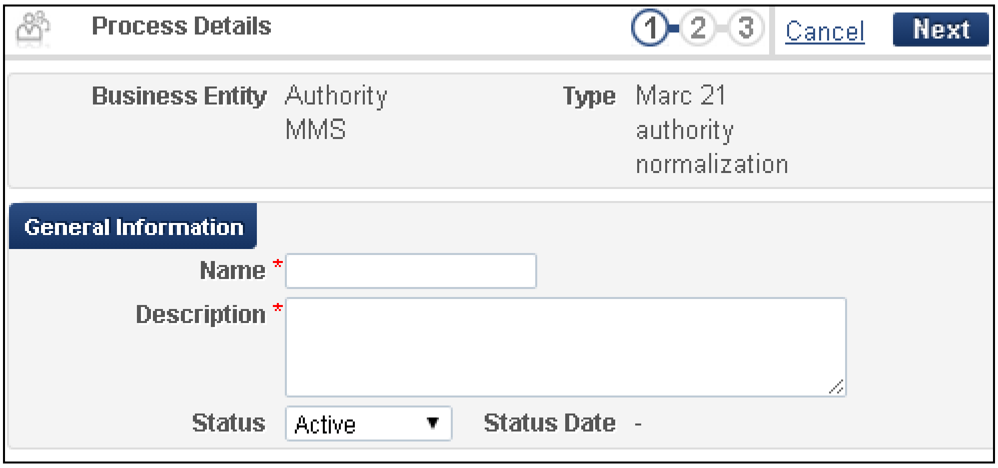


Figure 140: Process Details Page - Wizard Step 1

5 Enter the **Name**, **Description**, and **Status**; and click **Next**. Wizard step 2 of the Process Details page opens.

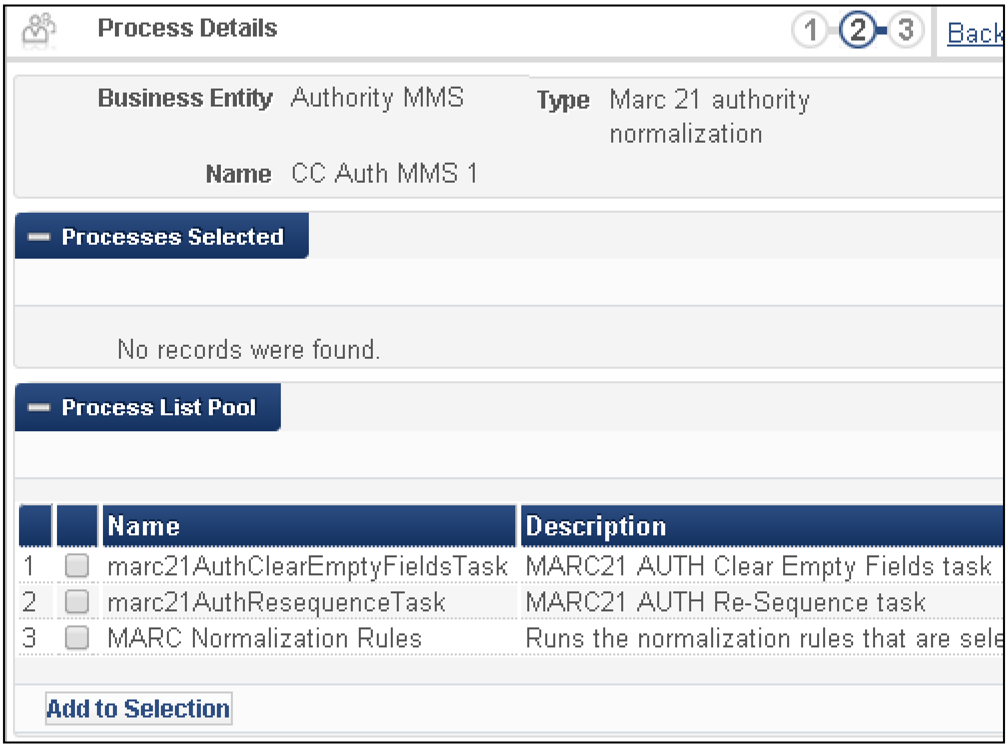


Figure 141: Process Details Page - Wizard Step 2

6 Select the **MARC Normalization Rules** process and click **Add to Selection**.

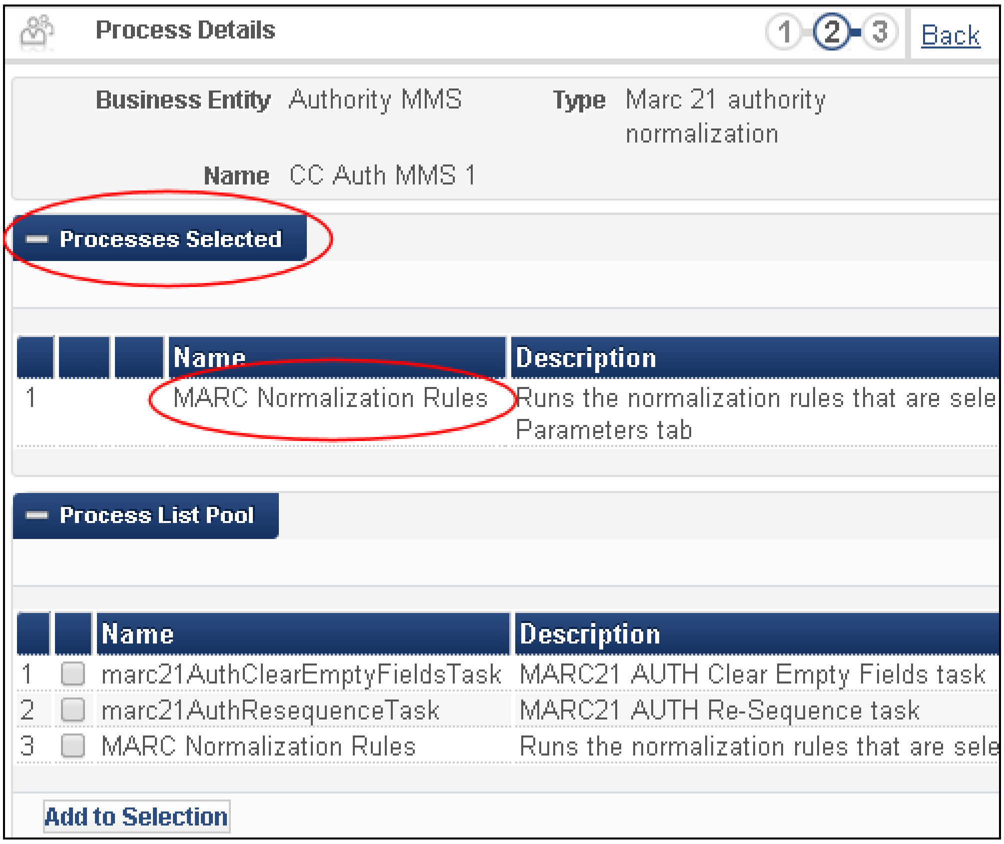


Figure 142: - MARC Normalization Rules Process Selected

7 Click **Next**. Wizard step 3 of the Process Details page opens.

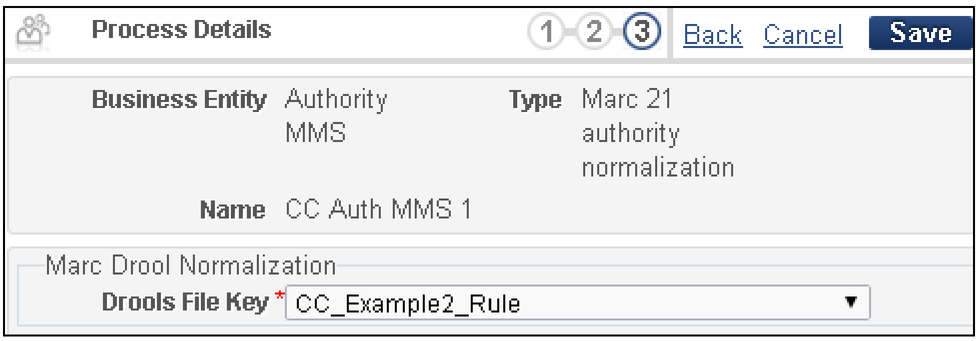


Figure 143: Process Details Page - Wizard Step 3

8 From the drop-down list, select the **Drools File Key** that you created for this process job (refer to **Working with Normalization Rules** on page **220** for additional information).

9 Click **Save**. The new normalization rule displays in the Normalization tab of the Profile Details page and can be edited, copied, or deleted using the **Actions** options.

To run a normalization job using the normalization rule/process you created:

1 Open the **Create Job – Select Job to Run** page (**Administration > Manage Jobs > Run a Job**).

2 Select **MARC 21 Authority Normalization** from the **Type** filter drop-down list. The normalization rules that you have created display on the Create Job – Select Job to Run page.

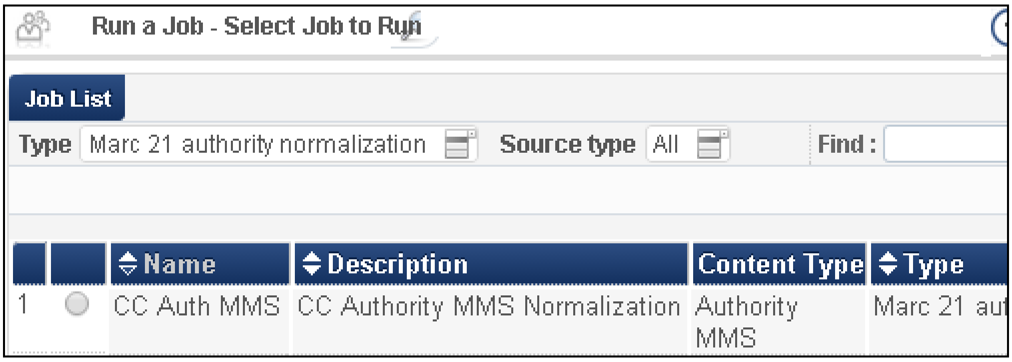


Figure 144: MARC 21 Authority Normalization Filter

3 Select the normalization rule/job that you want to run and click **Next**.

4 Select the set of authority records against which you want to process the normalization rule that you selected in the previous step.

5 Select the **Drools File Key** that contains the normalization logic you want to use for this job. The system defaults to the **Drools File Key** that you selected when you created the MARC 21 authority normalization rule.

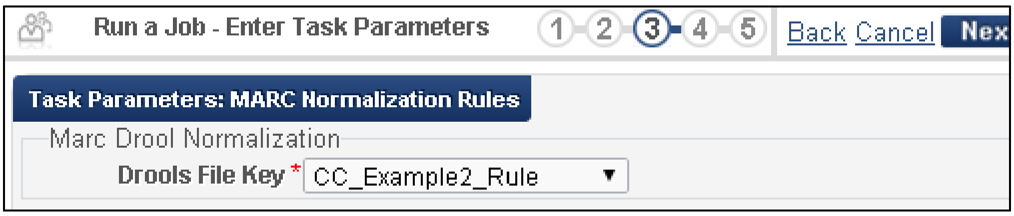


Figure 145: Drools File Key Selection

6 Complete the remainder of the job setup as you normally would.

Managing Authority Records in the MD Editor

The MD Editor provides catalogers with quick navigation to the authority records that are associated with a bibliographic record that is being edited using the Alma MD Editor. For additional information, see:

- **Linking an Authority Record to a Bibliographic Record** on page **202**
- **Viewing Linked Names/Subject Headings from a Bibliographic Record** on page **206**

Linking an Authority Record to a Bibliographic Record

The MD Editor allows you to link to a suggested authority record quickly from an authority-controlled field (100-199, 600, 610-619, 630, 700 710 730, 800, 810-819, 830, 440, 490, 648, 650,651, 654, 655, 748, 751, 754) in a bibliographic record. It also enables you to a view a read-only version of a suggested authority record and view the bibliographic records that are linked to this authority record.

In addition to the Name and Subject Headings authority support for the following bibliographic fields that are mapped to authority headings, Alma provides mapping for the bibliographic 490$a and 440$a (obsolete) and an F3 lookup for these fields in the Alma MD Editor. The 490$a (and 440$a) lookup is pulled from the authority record 130$a and 430$a:

- 130 – Main Entry – Uniform Title
- 630 – Subject Added Entry – Uniform Title
- 730 – Added Entry – Uniform Title
- 830 – Series Added Entry – Uniform Title

With the F3 lookup (refer to the procedure below for more information), you are provided the option to select your preferred series statement from a predefined list that is displayed in the MD Editor. The system does not do automatic linking/preferred term correction as part of the authorities daily processing for the 490$a/440$a since the 490$a/440$a series statement represents the information (the way that a series is named) on the book itself. (Refer to `http://id.loc.gov/authorities/names.html` for more information.) However, you can do an F3 lookup in the MD Editor for the 490$a/440$a series statement and optionally **Select** the preferred authorities to update the bibliographic 490$a/440$a. Refer to the example below.

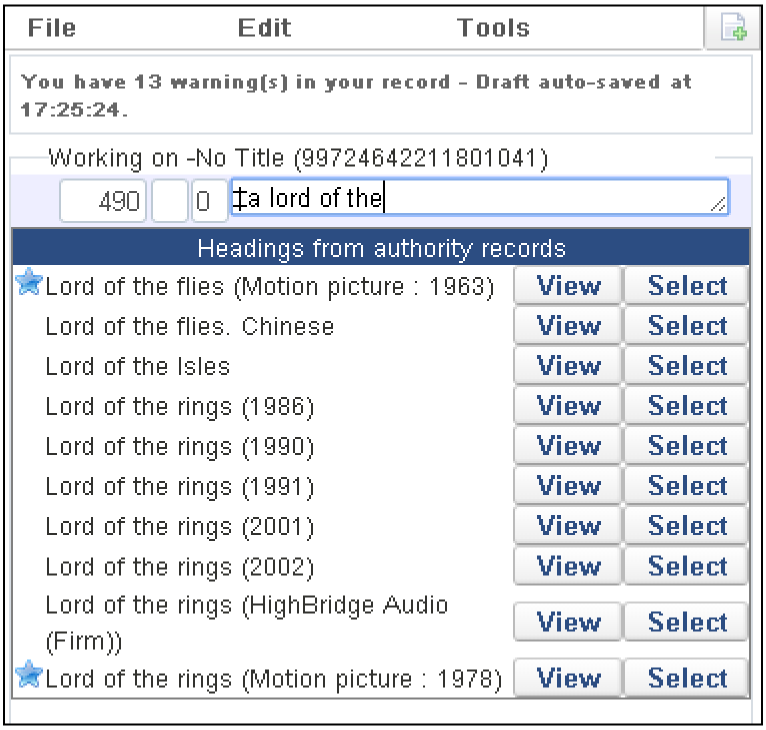


Figure 146: - F3 Lookup for 490$a

To view/link to an authority record from an authority-controlled field:

1. Open a new or existing bibliographic record in the MD Editor.
2. In an authority-controlled field (100-199, 600, 610-619, 630, 700 710 730, 800, 810-819, 830, 440, 490, 648, 650,651, 654, 655, 748, 751, 754), type at least three characters of the author's name or subject heading and then click **F3** to display a list of suggestions.

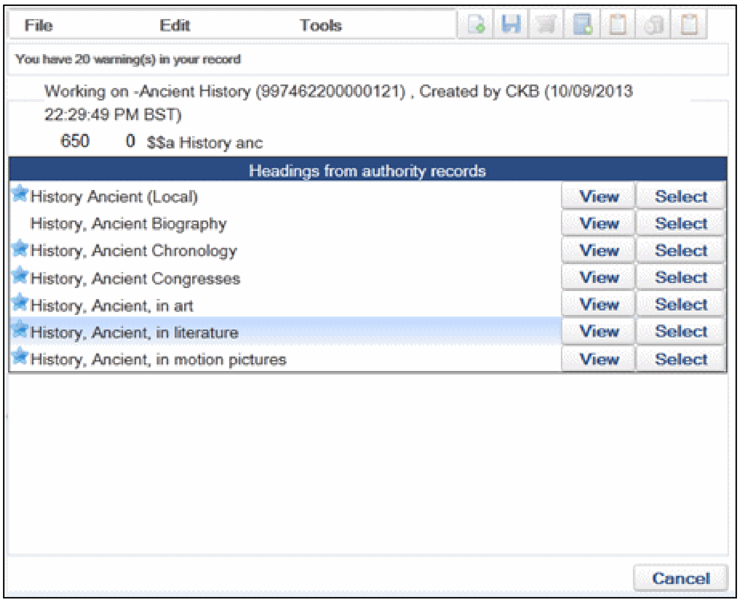


Figure 147: Suggested Terms List

If you do not see the name or subject heading you are looking for in the list, you may need to type additional characters in the field to narrow the results.

3 Click one of the following buttons:

- **Select** – Links the selected authority name or subject heading to your bibliographic record.
- **View** – Opens a read-only version of the full authority record on the right side of the split screen.

NOTE:

Local authorities are indicated by **(Local)** to the right of the title. A star to the left of the title indicates the preferred term. With any selection, the preferred term immediately replaces the non-preferred term.

For example:

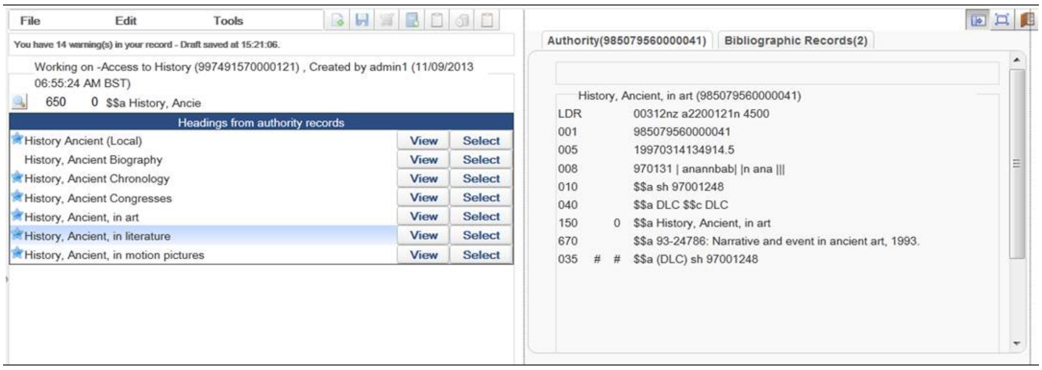


Figure 148: Viewing Suggested Authority Headings

If the authority record is local, not locked by another user, and not already included in the authority draft list, you are able to add it to your authority draft list by clicking the **Add Record to Editing List** button.

For example:

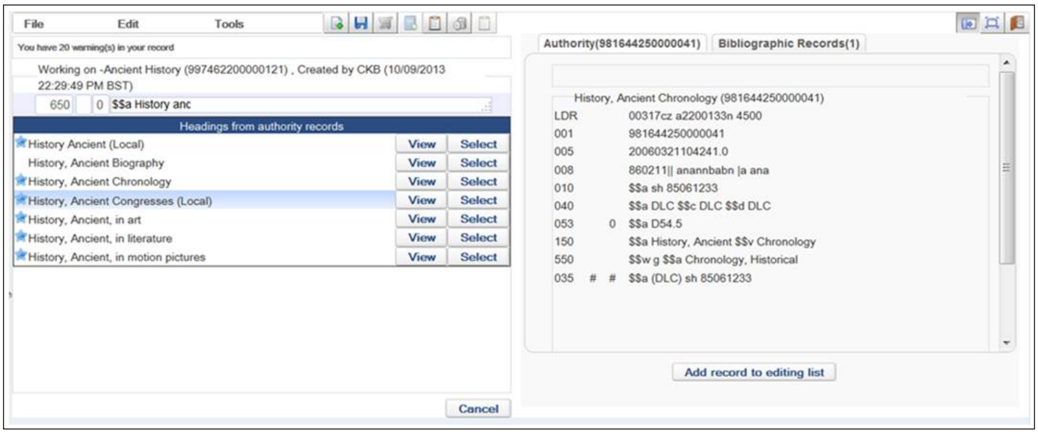


Figure 149: Viewing Suggested Authority Headings - Local Authority

To view the bibliographic records that are linked to a suggested authority record:

A **Bibliographic Records** tab is available on the right side of the split screen, enabling you to view a list of local bibliographic records that are linked to the selected authority record.

For example:

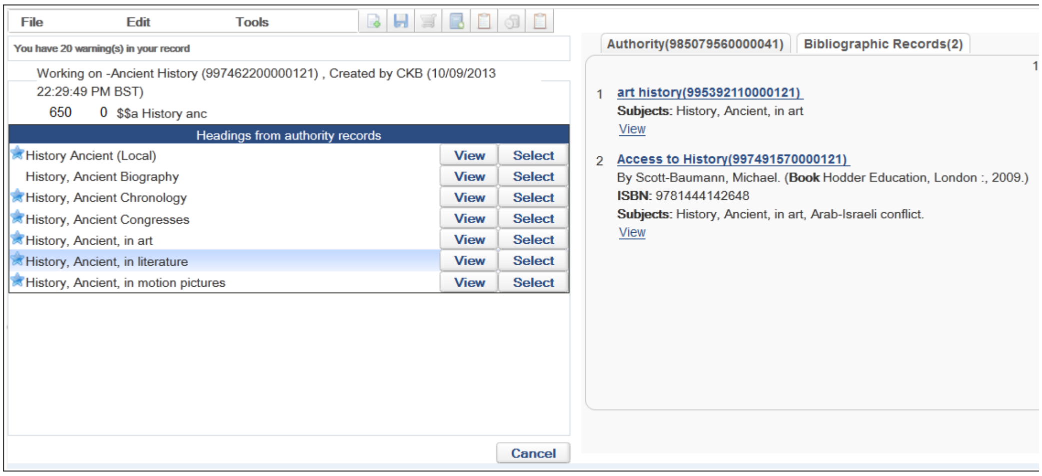


Figure 150: View Linked Bibliographic Records

When you click the **View** link for a result, Alma displays a full, read-only bibliographic record.

Viewing Linked Names/Subject Headings from a Bibliographic Record

The MD Editor allows you to view linked names/subject headings quickly from an authority-controlled field (100-199, 600, 610-619, 630, 700 710 730, 800, 810-819, 830, 440, 490, 648, 650,651, 654, 655, 748, 751, 754).

To view a linked name/subject heading:

1 Open a bibliographic record in the MD Editor.

If an authority-controlled field is linked to a name/subject heading, a magnifying glass icon appears next to the field.

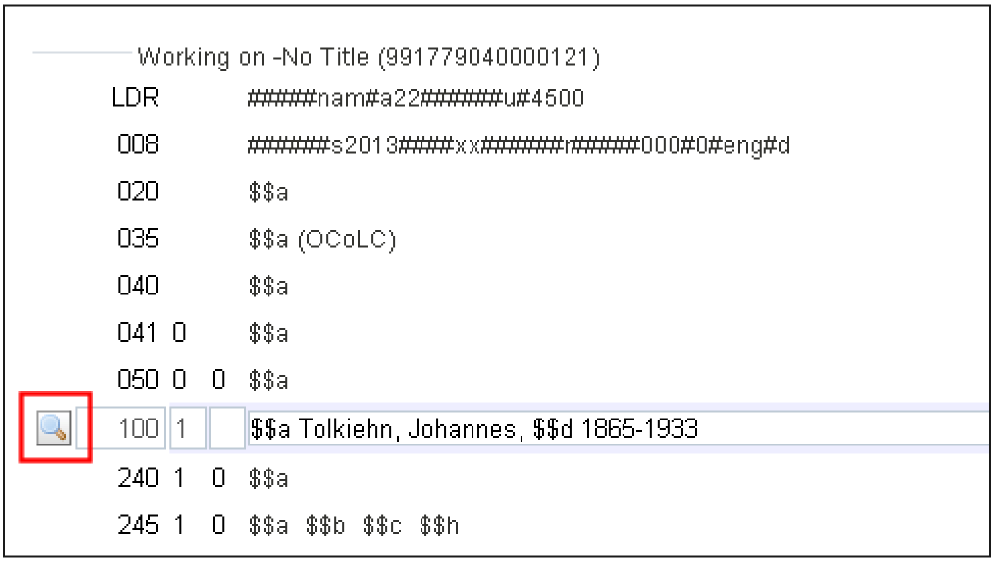


Figure 151: Linked-Field Indicator

2 Click the icon to display the linked name/subject heading in split-screen mode.

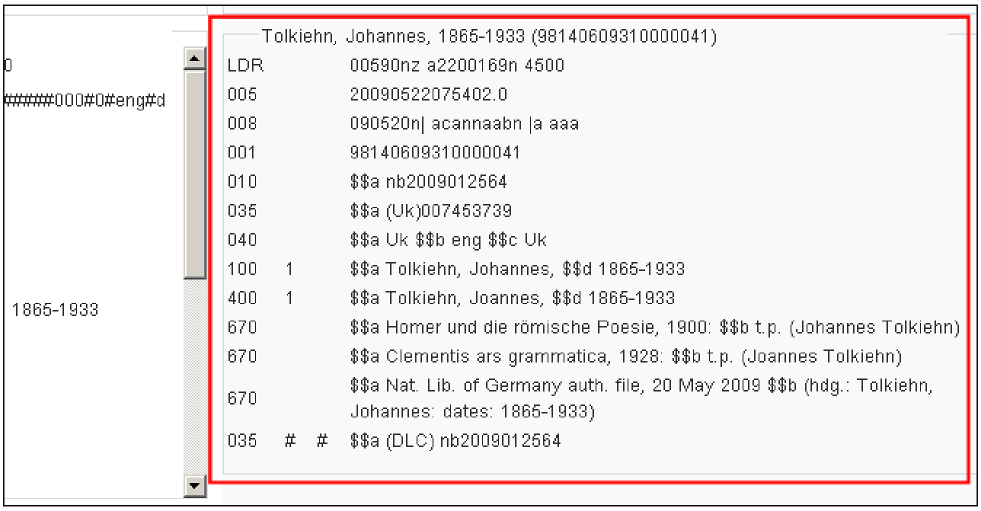


Figure 152: View Name/Subject Heading in Split-Screen Mode

Viewing Job Reports for Authority Processes

Alma allows you to view the job reports for the authority process jobs.

To view a job report:

1. From the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), select the **Scheduled** tab.

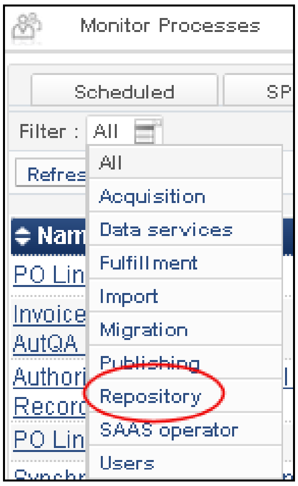


Figure 153: Repository Filter

2. From the Filter list, select **Repository**.

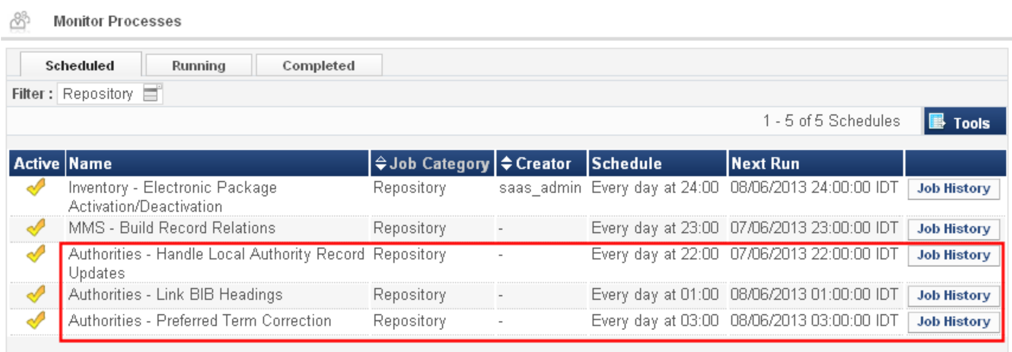


Figure 154: Authority Processes

NOTE:

For a detailed explanation of these jobs, see **Working with Authority Records** on page **184**. For information on running and monitoring imports, see **Running a New Import Job** on page **565**. For information on other authority/local authority jobs that can be run, see:

- the **Delete local authority records** job described in **Table 18** in the *Alma Administration Guide*
- the **Export authority records** job described in **Table 18** in the *Alma Administration Guide*

- the **Unlink bib records from authority records** job described in **Table 18** in the *Alma Administration Guide*
- **Performing Global Changes on Locally Managed Authority Records** on page **197**

3 For an authority process, click **Job History**.

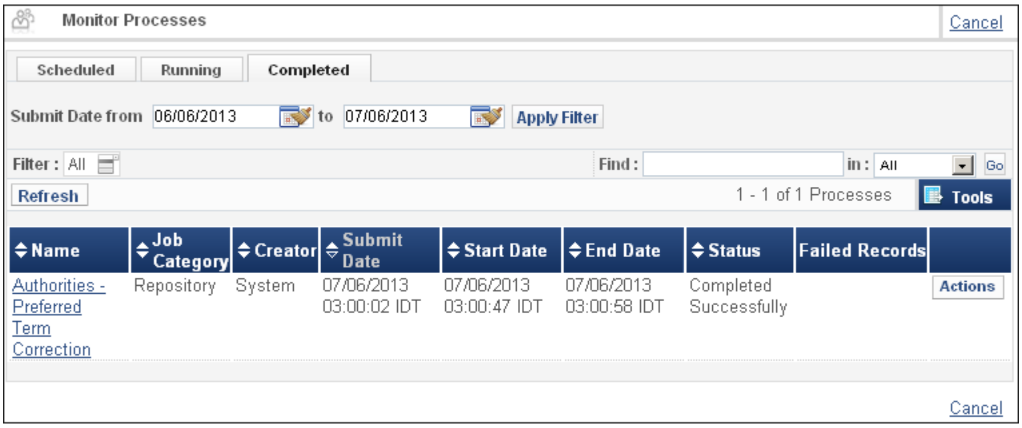


Figure 155: Authority Job History

4 For a job in the list, select **Actions > Report**.

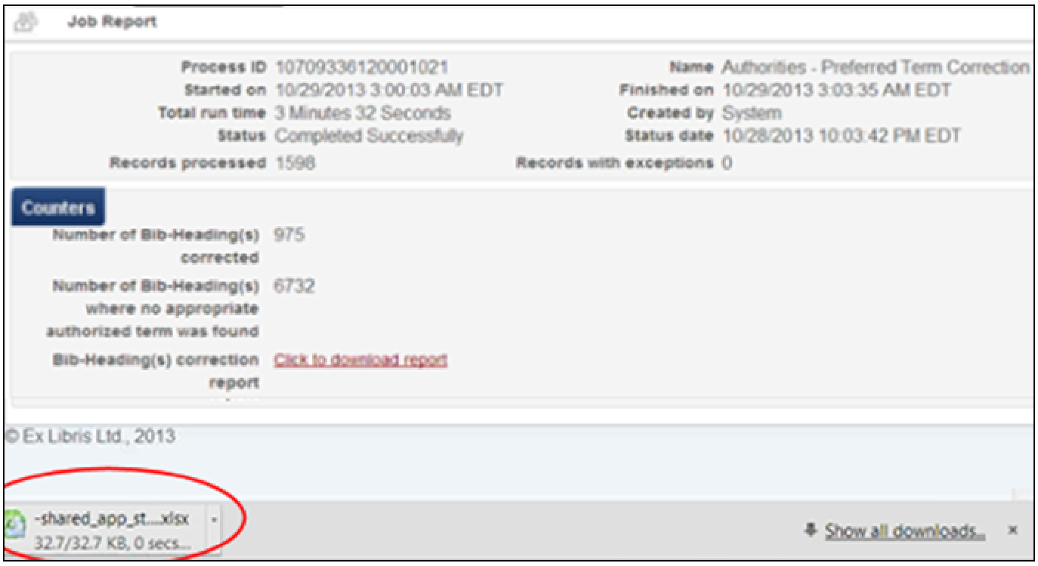


Figure 156: Download the Bibliographic Record Correction Report from Alma (.xlsx File)

Figure 157: Bibliographic Record Correction Report Example

The bibliographic record correction report contains the following information:

- MMS record ID
- Vocabulary code
- Field number
- Old value
- New value

Punctuation Rules for Updated Bibliographic Records

The following punctuation rules are implemented when bibliographic records are updated from the authority database:

Table 24. Punctuation Rules

(1) Tag & Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
1####	a		.	.
1####	d		.	-.
100##	a	4	.	
100##	d	4	,	
110##	b		.	.
600##	a		.	.
600##	b	a	,	
600##	d	a	,	,
600##	d		.	.,
600##	q		.	).
600##	t		.	).
6####	a		.	-).
6####	v		.	.
6####	x		.	).
6####	y		.	.

Table 24. Punctuation Rules

(1) Tag & Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
6####	z		.	.
7####	a		.	-).
7####	a	4	.	
7####	a	e	,	
7####	a	d	,	-).,
7####	d	e	,	-).,
7####	c	e	,	-).,
7####	q	e	,	
7####	b		.	.,
7####	b	e	.	.,
7####	d		.	.,
7####	d	t	.	.
800##	t	v	;	;
810##	t	v	;	;
83###	a	v	;	;

Column (1) = This column specifies the tag and indicators to which the rule applies.

Column (2) = This column identifies the subfield to which the punctuation may need to be added. If nothing is specified in Column (3), the subfield in column (2) is assumed to be the last subfield specified for the tag.

Column (3) = This column specifies the subfield that follows the subfield in column 2 when punctuation may need to be added.

Column (4) = This column identifies the punctuation that is to be added when the rule conditions are met.

Column (5) = This column is used to determine whether or not the punctuation in column (4) is added to the subfield identified in column (2). It provides the following rule conditions:

- If any of the punctuation specified in this column exists, the punctuation specified in column (4) is not added.
- If there is no punctuation specified in this column (the cell is blank), the punctuation in column (4) is added if all other conditions are met.

Handling Deleted Authorities During Metadata Imports

Alma allows you to delete global authority records that have been marked for deletion (which is indicated by a **d**, **s**, or **x** in the fifth position of the record's LDR) during metadata imports. For example, the following record has the fifth position set to **d**:

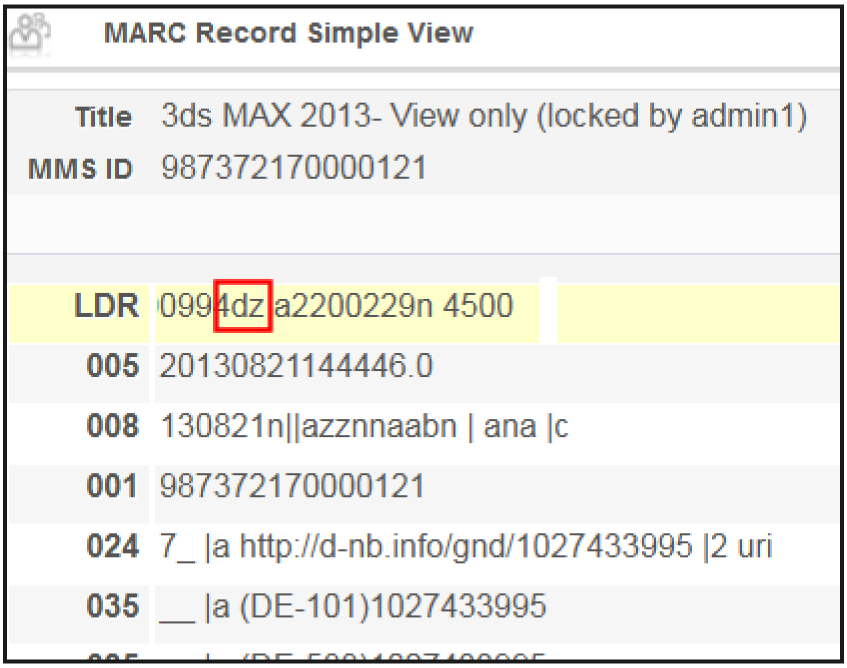


Figure 158: Record Marked for Deletion

Working with Norwegian Authority System (BARE) Records

Alma provides support for the Norwegian Authority System (BARE) authorities in the Community Zone (CZ) and the ability for authorized contributing institutions to seamlessly submit approved authority records to the BARE database and the Alma CZ in an E2E workflow from directly within Alma.

In order to contribute BARE authority records, your institution needs to be configured in the CZ by Ex Libris. Submit a SalesForce case to request Ex Libris to configure your authorization in the CZ.

BARE data has been added to the CZ, and Ex Libris has added and will maintain the list of BARE contributing institutions with permission to update the BARE database.

With this capability, you can create, update, or delete BARE authority records using the Alma MD Editor. When you save a new or updated record or delete a BARE record in the Alma MD Editor, a request is sent to BARE for approval (via SRU/U protocol). If an approved record response is returned, the record is saved in the Alma CZ and the master BARE database. Otherwise, an error message is displayed to the user in the MD Editor, and whatever issue BARE has with the record will need to be resolved.

Changes accepted by BARE are incorporated into the master BARE database and become available to all Alma users through the CZ. Ex Libris will regularly update the CZ with BARE changes to include those changes made outside the Alma environment.

Using the existing method (F3), MARC 21 bibliographic records can be created or edited in the Alma MD Editor using BARE authorities. Refer to the section **Creating Bibliographic Records** on page 173 for more information.

To contribute/submit a BARE record for approval:

1. Open the **MD Editor** (**Resource Management > Cataloging**).
2. Click **File > New > BARE** to create a new record.

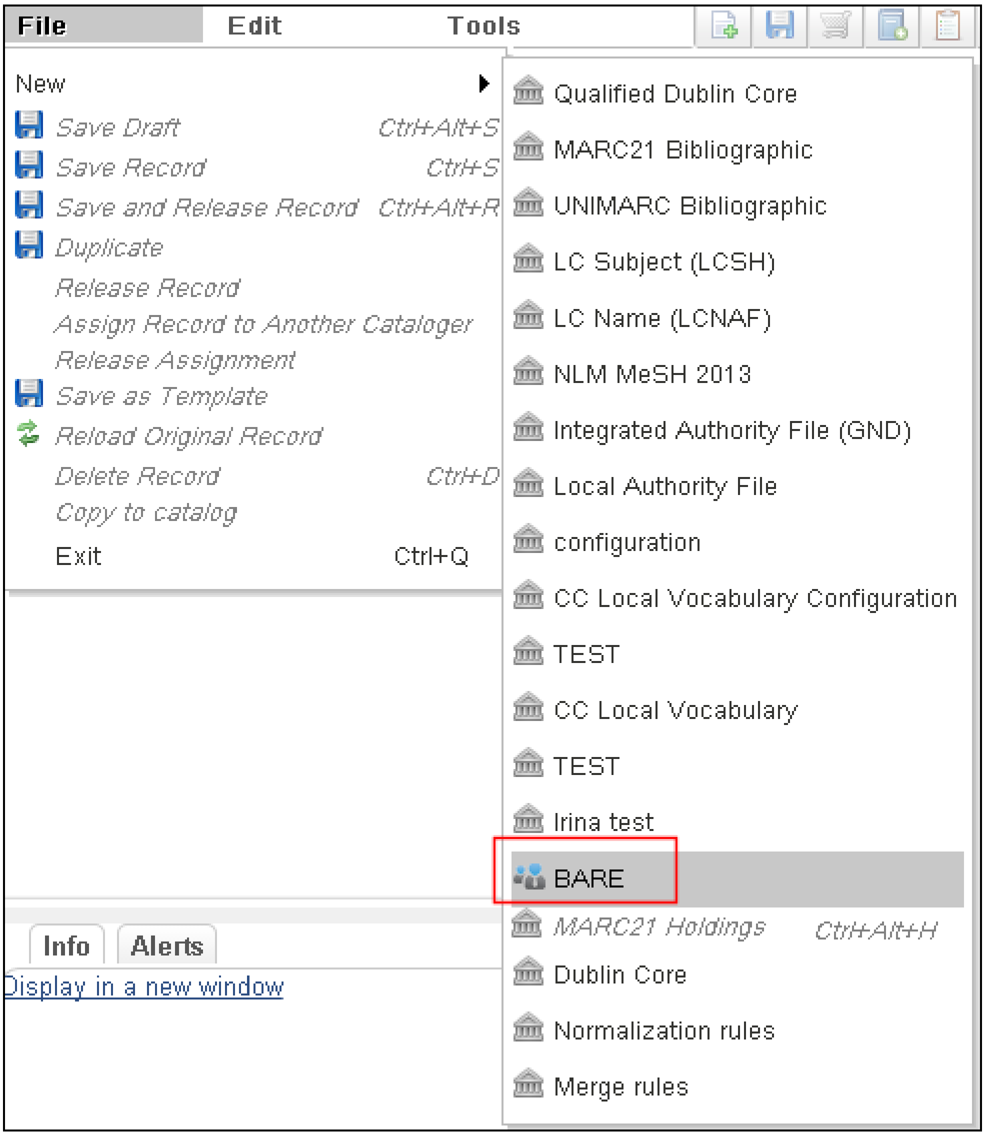


Figure 159: BARE Contribution Option

3 Enter the authority record details.

4 Click the **Save** icon.

Alma submits the record to BARE for approval. If there is an error, BARE responds through the Alma MD Editor with an error message. If the contributed record is approved, it is stored in the CZ and the master BARE database.

Using Originating System IDs for Linking Bibliographic Records to Authority Records

Alma provides support for using originating system IDs for linking bibliographic records to specific authority records. Alma enables this capability by using $0 in one of the control fields of a bibliographic record to store the originating system ID for the authority record (pulled from the authority record 035 $a) to which you want to link the current bibliographic record.

The default method in Alma for linking bibliographic records to authority records is via text matching as described in **Creating Bibliographic Records** on page **173** and **Linking an Authority Record to a Bibliographic Record** on page **202**. If you, additionally, choose to use the originating system ID method for linking, you need to have Ex Libris set the `use_marc_sf_zero_as_auth_id` customer parameter to `true`.

Refer to **Table 25** for a list of the control fields that are supported for this capability.

Table 25. Control Fields Supported

Type	Control Fields
Authority Names **NOTE:** The originating system is determined by the `authority_names` setting Ex Libris defines in your Customer Parameters mapping. For example, if `authority_names` is set to LCNAMES, the originating system is the Library of Congress.	100, 110, 111, 130, 600, 610, 611, 630, 700, 710, 711, 730, 800, 810, 811, 830
Authority Subjects The originating system is determined by the field's second indicator as identified in the following list: ■ 0=LCSH ■ 1=LCSHKIDS ■ 2=MESH ■ 3=NAL ■ 4 ■ 5=CSH ■ 6=RVM ■ 7=as defined in subfield 2	648, 650, 651, 654, 655, 751
As defined in subfield 2	751, 752, 754

Once a bibliographic record has $0 stored with the originating system ID for a specific authority record, the Alma daily process to update records will use the specific $0 information to update the authority linked bibliographic records.

To insert $0 with the originating system ID into a bibliographic record:

1 Open the bibliographic record to which you want to add $0 in the MD Editor.

2 Make the control field to which you want to add the $0 the active row and press **F3**. The headings from authority records are displayed.

Figure 160: F3 Authority Suggestions List

3 Click **View** for the authority record you prefer. The MD Editor displays the details of the authority record in Split Editor mode.

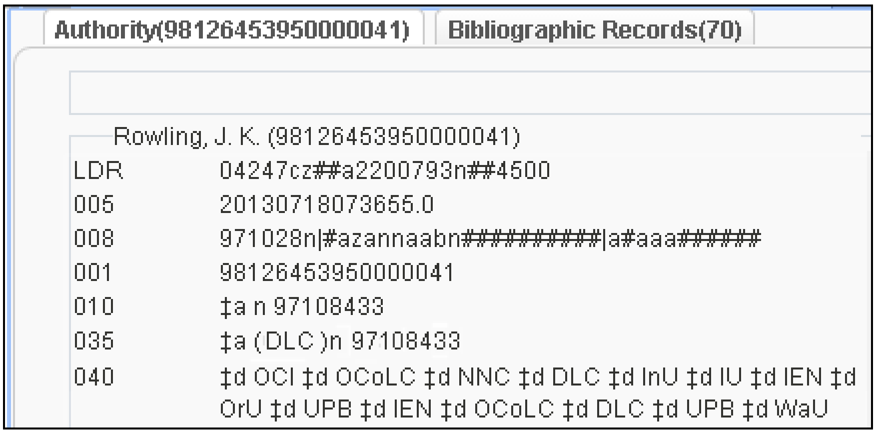


Figure 161: Authority Record Details in Split Editor Mode

4 Review the authority record details, confirm that this is the authority record to which you want to link the bibliographic record, and click **Select** from the list of suggestions.

Figure 162: Click Select for the Preferred Authority

$0 is automatically added to the control field from which you initiated this process with the originating system ID pulled from the authority record's 035 $a.

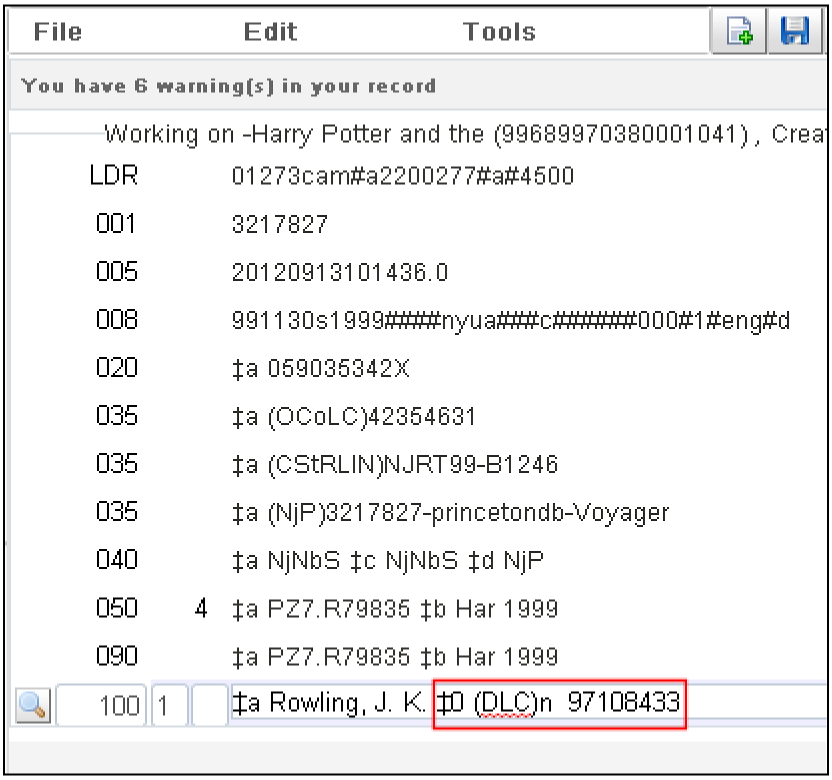


Figure 163: $0 Created

5 Save your bibliographic record.

Now that this control field contains $0, pressing F3 displays only the authority record with the originating ID that is stored in $0.

Figure 164: Only the Authority Record with the Originating ID stored in $0 is Displayed

Working with Normalization Rules

PERMISSIONS:

To work with normalization rules, you must have the following role:

- Catalog Administrator

The Metadata (MD) Editor enables you to create normalization rules and apply them to MARC 21 records, or apply normalization rules that have already been created to records, so that changes to MARC 21 bibliographic metadata can later be made globally, in bulk. The syntax required for the rules is described in **Normalization Rules – Syntax and Examples** on page **224**.

Using the preview functionality, you can:

- View the normalization rules and metadata records side by side
- Preview the outcome of a rule file when run on a metadata record
- Toggle between the rule file and the preview changes
- Edit rules and test immediately

This section describes how to create a normalization rules file, work with previously created rules files, and preview the outcome of a rules file when it is run on a single metadata record. For information on running a normalization rules file on a set of records, see **Running Jobs on Defined Sets** on page **305**.

NOTE:

For additional information on normalization rules, see *Using Normalization Rules* in the Documentation Center. Note that you must be logged in to the Documentation Center in order to view this document.

VIDEO:

For a video on Normalization rules, see *Normalization Rules* (41:07 mins). For a detailed Ask the Expert session on configuring normalization rules, see *Normalization Rules*.

To create a new normalization rule file:

1 On the MD Editor page (**Resource Management** > **Cataloging > Open Metadata Editor**), select **File > New > Normalization Rule**. The Normalization Rules Properties dialog box opens.

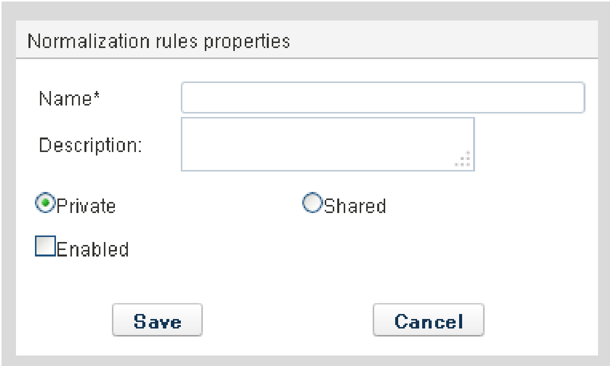


Figure 165: Normalization Rules Properties Dialog Box

2 Enter a name (required) and a description for the normalization rule file.

3 Select an access option, Private or Shared. If you select the former, only you can work on the rule and the rule cannot be included in a normalization process. If you select the latter, your rule will be shared among catalogers. In this case, more than one user can view the rule at the same time, and if two or more people have the rule open for editing, a warning message appears when one of you tries to save changes. (You have the option of keeping your changes or allowing the other user to make and save changes.)

4 To enable the rule, click the **Enabled** check box . (By default, the normalization rule file you create is disabled.)

5 Click **Save**. A text box, in which you enter the rule or rules, opens.

You can include existing rule syntax (**Edit > Add Rule >Marc 21 Bib Snippet {type of rule}**) or define a rule using the syntax described in **Normalization Rules – Syntax and Examples** on page **224**.

The following is an example of a normalization rule:

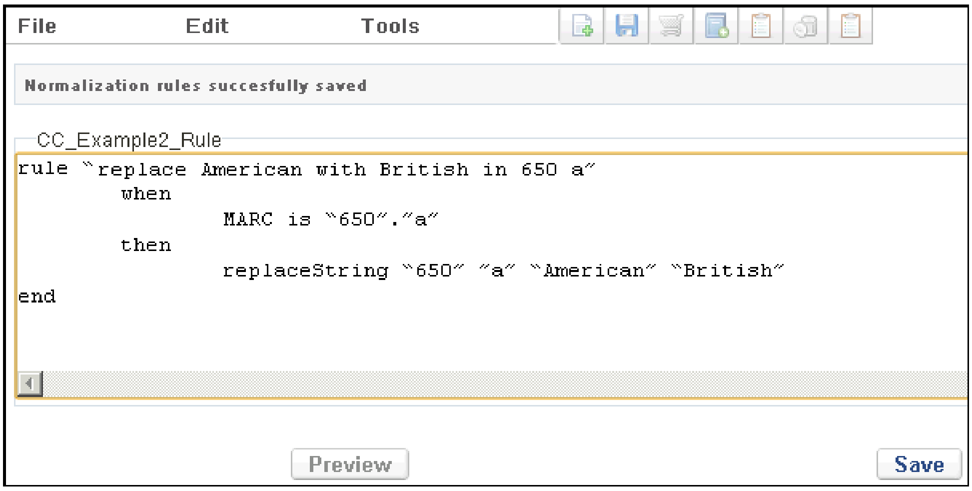


Figure 166: Normalization Rule Example

6 Click **Save**. The rule file is added to the list of rule files in the **Normalization Rules** tab.

To work with an existing normalization rule file:

1 On the MD Editor page (**Resource Management** > **Cataloging** > **Open Metadata Editor**), click the **Rules** tab and expand the **MARC 21 bibliographic** list to display the saved rule files.

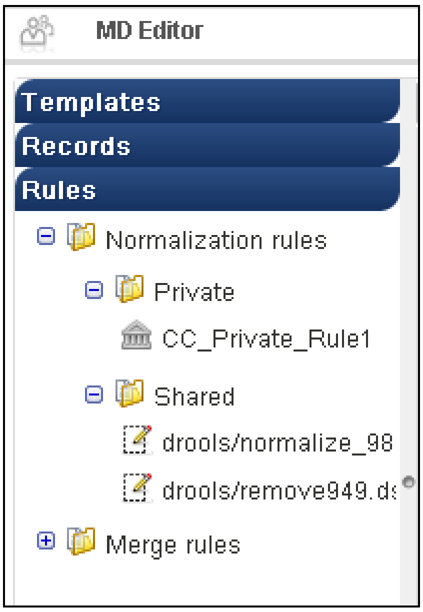


Figure 167: Rules Tab

2 Click the rule file with which you want to work and select one of the following options:

- **Edit** – Opens the text box with the rule(s) syntax, enabling you to modify this syntax (for details, see Normalization Rules – Syntax and Examples on page 224).
- **Delete** – Click **Yes** to confirm the rule file's deletion.
- **Duplicate** – Duplicates the selected rule file, enabling you to modify and save it as a new rule file without affecting the original file.
- **Properties** – Opens the Normalization Rules Properties dialog box, enabling you to modify the properties of the rule file.

To preview the outcome of a rule file:

1 Locate the bibliographic record with which you want to work (via the Repository Search or within the MD Editor Records tab) and open it in the MD Editor.

2 Select **Edit > Split Editor** (F6) or click the **Split Editor** button.

3 Click the **Rules** tab, expand the **MARC 21 bibliographic** list to display the saved rule files, select the file whose outcome you want to preview, and click **Edit**. The rule file is displayed in the right pane of the Editor.

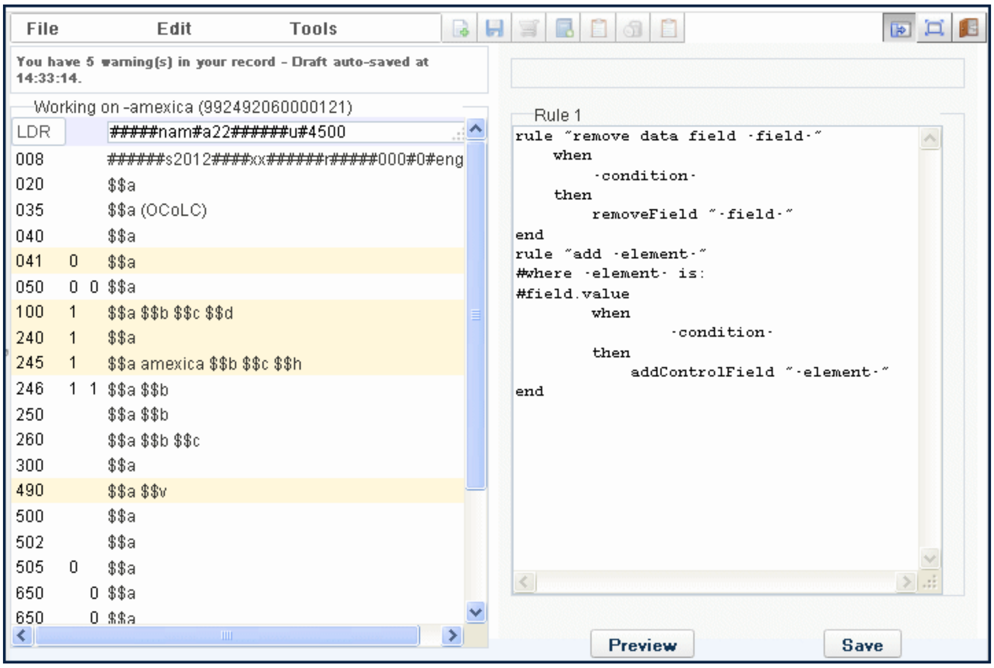


Figure 168: Normalization Rule – Preview

4 Click the **Preview** button. The rule or rules in the file are applied to the record and the outcome is displayed.

Click **Save** to save the modifications to the record.

Normalization Rules – Syntax and Examples

Rule files contain one or more rules, which contain one or more actions to be applied to candidate records. A record is a candidate for the application of a rule if the entire record meets the defined conditions. Each action within a rule can be performed on a single field within a record, either unconditionally or subject to a defined condition. Note that the actions are performed in the order in which they appear within the rule.

VIDEO:

Learn more about creating normalization rules in the *Normalization Rules* video (41:07 mins).

Learn how to create normalization rules that delete specified fields from records, or change the contents of these fields in the *Normalization Routine Syntax for Deletion or Content Change* video (9:57 mins).

```
When
(<conditions on MARC record>) then
     Action1
     Action2 if condition
     Action3
End
```

`<conditions on MARC record>` contains one or more Boolean clauses that apply to the record. If `<conditions on MARC record>` returns `TRUE`, the record is a candidate for the application of the normalization rule; otherwise, the rule will not be applied and the record will not be processed.

NOTE:

"`When`" must be the only word in the first line. The condition must be placed on a separate line.

Record Elements

Conditions and actions apply to record elements, such as the MARC record, fields (one or more), indicators, subfields (one or more), and field/subfield contents.

To test a condition or apply an action to a record element, the element must match the following syntax:

Table 26. Syntax

Expression	Meaning
"<tag>"	Represents a field tag, for example, 001, 245, etc.
"<new tag>}"	Represents a field tag, for example, 001, 245, etc.
"<oldCode>"	Represents a subfield code, for example, a, b, c.
"<newCode>"	Represents a subfield code, for example, a, b, c.
"<element>" for a data field	The following are the possible values for the data field: ■ FIELD– for example: 245 ■ FIELD_VALUE – for example: 245.value* ■ FIELD_INDICATOR – for example: 245.{1,2} ■ FIELD_SUBFIELD_CODE – for example: 245.a ■ FIELD_INDICATOR_SUBFIELD_CODE – for example: 245.{1,2}.a ■ FIELD_SUBFIELD_CODE_VALUE – for example: 245.a.value* ■ FIELD_INDICATOR_SUBFIELD_CODE_VALUE – for example: 245.{1,2}.a.value*
"<element>" for a control field	The following are the possible values for a control field: ■ FIELD_POSITION_LENGTH – for example: LDR.{17,3} ■ FIELD_POSITION_LENGTH_VALUE – for example: LDR.{17,3}.eng
CONDITION at record level	The following are the possible values for a control field: ■ TRUE ■ not exists {element} ■ not existsControl "{element}" ■ exists "{element}" ■ existsControl "{element}"

Consequences

The tables below provide lists of consequences for the following condition scenarios:

- When the condition is not satisfied at the field level (**Table 27**)
- When the condition is satisfied at the field level (**Table 28**)
- When there is no condition at the field level (**Table 29**)

Table 27. Consequences for Conditions Not Satisfied

Consequences for Conditions Not Satisfied
addcontrolField "{element}" if(not exists "{condition}")
addField "{element}" if(not exists "{condition}")
addSubField "{element}" if(not exists "{condition}")
changecontrolField "{tag}" to "{newTag}" if(not existsControl "{condition}")
changeField "{tag}" to "{newTag}" if(not exists "{condition}")
changeFirstindicator "{tag}" to "{value}" if(not exists "{condition}")
changeSecondindicator "{tag}" to "{value}" if(not exists "{condition}")
changeSubField "{oldCode}" to "{newCode}" if(not exists "{condition}")
changeSubFieldExceptFirst "{oldCode}" to "{newCode}" if(not exists "{condition}")
changeSubFieldOnlyFirst "{oldCode}" to "{newCode}" if(not exists "{condition}")
copycontrolField "{tag}" to "{element}" if(not existsControl "{condition}")
copyField "{tag}" to "{element}" if(not exists "{condition}")
Prefix "{element}" with "{prefix}" if(not exists "{condition}")
removecontrolField "{tag}" if(not existsControl "{condition}")
removeField "{tag}" if(not exists "{condition}")
removeSubField "{element}" if(not exists "{condition}")
replacecontents "{element}" with "{newValue}" if(not exists "{condition}")
replacecontentsExceptFirst "{element}" with "{newValue}" if(not exists "{condition}")
replacecontentsOnlyFirst "{element}" with "{newValue}" if(not exists "{condition}")
replacecontrolcontents "{element}" with "{newValue}" if(not existsControl "{condition}")
Suffix "{element}" with "{suffix}" if(not exists "{condition}")

Table 28. Consequences for Conditions Satisfied

Consequences for Conditions Satisfied
addcontrolField "{element}" if(exists "{condition}")
addField "{element}" if(exists "{condition}")
addSubField "{element}" if(exists "{condition}")
changecontrolField "{tag}" to "{newTag}" if(existsControl "{condition}")
changeField "{tag}" to "{newTag}" if(exists "{condition}")
changeFirstindicator "{tag}" to "{value}" if(exists "{condition}")
changeSecondindicator "{tag}" to "{value}" if(exists "{condition}")
changeSubField "{oldCode}" to "{newCode}" if(exists "{condition}")
changeSubFieldExceptFirst "{oldCode}" to "{newCode}" if(exists "{condition}")
changeSubFieldOnlyFirst "{oldCode}" to "{newCode}" if(exists "{condition}")
copycontrolField "{tag}" to "{element}" if(existsControl "{condition}")
copyField "{tag}" to "{element}" if(exists "{condition}")
Prefix "{element}" with "{prefix}" if(exists "{condition}")
removecontrolField "{tag}" if(existsControl "{condition}")
removeField "{tag}" if(exists "{condition}")
removeSubField "{element}" if(exists "{condition}")
replacecontents "{element}" with "{newValue}" if(exists "{condition}")
replacecontentsExceptFirst "{element}" with "{newValue}" if(exists "{condition}")
replacecontentsOnlyFirst "{element}" with "{newValue}" if(exists "{condition}")
replacecontrolcontents "{element}" with "{newValue}" if(existsControl "{condition}")
Suffix "{element}" with "{suffix}" if(exists "{condition}")

Table 29. Consequences for No Conditions

Consequences for No Conditions
addcontrolField "{element}"
addField "{element}"
addSubField "{element}"
addSystem[nN]umber "{element}" from "{tag}" prefixed by "{prefixTag}"

Table 29. Consequences for No Conditions

Consequences for No Conditions
changecontrolField "{tag}" to "{newTag}"
changeField "{tag}" to "{newTag}"
changeSubField "{oldCode}" to "{newCode}"
changeSubFieldExceptFirst "{oldCode}" to "{newCode}"
changeSubFieldOnlyFirst "{oldCode}" to "{newCode}"
changeFirstindicator "{tag}" to "{value}"
changeSecondindicator "{tag}" to "{value}"
copycontrolField "{tag}" to "{element}"
copyField "{tag}" to "{element}"
Prefix "{element}" with "{prefix}"
removecontrolField "{tag}"
removeField "{tag}"
removeSubField "{element}"
replacecontents "{element}" with "{newValue}"
replacecontentsExceptFirst "{element}" with "{newValue}"
replacecontentsOnlyFirst "{element}" with "{newValue}"
replacecontrolcontents "{element}" with "{newValue}"
Suffix "{element}" with "{suffix}"

The Boolean OR operator can be used in a consequence statement by using the pipe (|) symbol. Refer to the table below for an example.

Table 30. Boolean OR Operator Example

```
removeField "866" if (not exists "866.8.0|99")
```

NOTE:

In cases where the pipe symbol may be part of the value compared, you need to use four backslashes (\\\\) as the escape string. For example:
```
removeField "866" if (exists "866.8.0\\\\|99")
```

Wildcards

The asterisk (*) is used to match any string. For example, "<tag>.<*>.<value>" applies to all the subfields in the tag <tag> that have the value <value>.

Empty fields, subfields, or indicators are indicated by a dash (-). For example, "<tag> {-,<ind2>}" returns all the fields where the MARC tag is <tag>, the first indicator is not defined, and the second indicator is <ind2>.

General Structure of Conditions

Conditions are divided into the following two groups:

1. exists <element> – at least one match is found

   There is a further differentiation between data fields and control fields:

   - exists <element> – applies to data fields
   - existsControl <element> – applies to control fields

2. not exists <element> – no match is found

   There is a further differentiation between data fields and control fields

   - not exists <element> – applies to data fields
   - not existsControl <element> – applies to control fields

Conditions can be defined at the entire rule level (WHEN), or at a specific action level (IF). The same condition will behave differently depending on the level at which it is defined.

- WHEN clause – defines a condition that must be met by the entire record in order to determine whether the record is a candidate for the application of the rule
- IF (within an action) – defines a condition that applies to a single field in order to determine whether the specific action will be taken on that single field

General Structure of Actions

Table 31 describes the general structure of actions.

Table 31. General Structure of Actions

Action	Condition	Comment
Action 1	none/blank	Action 1 will be executed unconditionally.
Action 1	If (condition 1)	Action 1 will be executed only if condition 1 is true.

List of Actions

Table 32 provides a list of available actions.

Table 32. List of Actions

Action	Condition	Comment
Replacing fields and subfields with other fields and subfields	ChangeControlField "<tag>" to "new tag" Example: ChangeControlField "007" to "008"	Changes the tag identifier of a control field; does not modify contents.
	ChangeField "<tag>" to "new tag" Example: ChangeField "245" to "246"	Changes the tag identifier; does not modify indicators or subfields.
	ChangeSubField "<tag>.<code>" to "new code" Example: ChangeSubField "035.b" to "a"	Changes the subfield "<code>" to the subfield "new code" in field "<tag>".
	ChangeFirstIndicator "<tag>" to "<value"> ChangeSecondIndicator "<tag>" to "<value"> Example: ChangeFirstIndicator "245" to "3"	Sets the value of the specified indicator in tag <tag>. If the indicator has a value, it will be changed.
Adding fields and subfields	AddField "<tag>.<code>.<value>" AddField "<tag>.{<ind1>,<ind2>}.<code>.<value>" Example: AddField "999.a.RESTRICTED"	Adds the field to the MARC record. Sets the value of the subfield to the indicated value.
	AddControlField "<tag>"."<value>" Example: AddControlField "008.820305s1991####nyu###########001#0#eng##"	Adds the control field to the MARC record. Sets the value of the subfield to the indicated value.
	AddSubfield "<tag>.<code>.<value>" AddSubfield "<tag>.{<ind1>,<ind2>}.<code>.<value>" Example: AddSubfield "245.h.[Journal]"	Adds the subfield <code> with value <value> to field <tag>. If the field does not exist, nothing is done.

Table 32. List of Actions

Action	Condition	Comment
Removing fields and subfields	`RemoveField "<tag>"` Example: `RemoveField "880"`	Removes all occurrences of the field `<tag>`.
	`RemoveSubfield "<tag>.<code>"` Example: `RemoveSubfield "245.h"`	Removes the subfield `<code>` from the indicated field.
Replacing text in fields or subfields	`ReplaceControlContents "<tag>.{<position>,<length>}.<value>" with "new value"` Example: `ReplaceControlContents "LDR.{7,1}.s" with "m"`	Replaces `<value>` with `"new value"` in starting position `<position>` to `<position>+<length>` of control field `<tag>`. Replaces only the text that matches `<value>`.
	`ReplaceContents "<tag>.<code>.<value>" with "new value"` Example: `ReplaceContents "245.h.[Journal]" with "[Book]"`	Replaces the string `<value>` in the subfield `<code>` of field `"<tag>"` with `"new value"`. The string or part of the string that does not match `<value>` is not modified.
	`Prefix "<tag>.<code>" with "<value>"` Example: `"035.b" with "(OCoLC)"`	Adds a prefix to the value of subfield `"<code>"` in the field `"<tag>"`.

Examples

The following table provides a list of (and links to) all the normalization examples provided below.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 1	not exists	addField	Add field 901 with $$a with the text Architecture Dept if it does not exist
Example 2	exists not exists	addField	Add field 901 with $$a with the text Architecture Dept only if the 902 $$b contains 034-ARC.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 3	TRUE	removeSubfield	Remove $$b and $$c from the 260 field.
Example 4	TRUE	replaceContents	Replace the text apple with the text orange in the 650 $$a (unconditionally).
Example 5	TRUE	replaceContents	Replace the text apple with the text orange in any subfield of the 650 field (unconditionally).
Example 6	exists	replaceContents	Replace the text apple with the text orange in 650 $$a only if the 049 has $$a OCM
Example 7	Not exists	replaceContents	Replace the text apple with the text orange in 650 $$a only if the 049 does not have $$a OCM.
Example 8	TRUE Not exists	addSubField	Add $$h to the 245 field with the text [Journal] (unconditionally).
Example 9	TRUE Not exists	addSubField	Add $$h to the 245 field with the text [Journal] if there is no $$h.
Example 10	Not exists	addDataField	Add field 999 with $$a CR_RESTRICTED if it does not exist.
Example 11	TRUE	copySubField	Copy the 035 $$b to the 035 $$a.
Example 12	TRUE Not exists Not exists	copySubField	Copy the 035 $$b to the 035 $$a if it does not exist with the prefix (YBP).
Example 13	Exists Control Not Exists	addSubField	Create 245 $$h [Video] if position 6 of the LDR is g.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 14	Exists Control Not Exists	addSubField	Create 041 $$a with `ger` if position 35-37 in the 008 field is `ger`.
Example 15	Exists Control Not Exists	addSubField	Add $$h to the 245 field with the text [Journal] if there is not $$h in the 245 field and 022 exists or position 7 in the LDR is s.
Example 16	Exists Control exists Not Exists	addSubField	Add the 940 field with the first indicator of 1, the second indicator empty, and $$a with the text YBPDDA.
Example 17	TRUE	addField	Change the second indicator of the 856 field to 0 (zero) if its value is 1 (one).
Example 18	TRUE	changeControlField	Move the 001 field to the 009 field.
Example 19	Not exists	changeControlField	Move the 001 field to the 009 field if 009 does not already exist.
Example 20	TRUE	changeField	Move the 300 field to the 901 field.
Example 21	Not exists	addField	Add the 0820 field with $$a with the text 296.5 YLK if it does not already exist in either the 082 or the 0820.
Example 22	exists	changeControlContents	Replace position 6 of the LDR field with `e` if the 245 $$h is `[Map]` or `[Carte]`.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 23	exists	replaceControlContents	Replace position 6 of the LDR field with `e` if the 245 $$h is `[Map]` or `[Carte]` and the position 6 of the LDR field is `a`.
Example 24	TRUE	replaceControlContents	Replace position 6 of the LDR field with `e` all the time.
Example 25	TRUE	removeField	Delete all the 9XX fields.
Example 26	TRUE	removeField	Delete all the 92X fields.
Example 27	TRUE	removeField	Delete all the 035 fields which start with (MBU) and end with 01bosu.
Example 28	TRUE	removeField addField addSubField	Remove the existing 100 field and add a new 100 field with 1001 $$a Smith, John $$d1971-.
Example 29	TRUE	removeSubField	Remove $$b from the 900 field.
Example 30	TRUE Not exists	suffix	Append (ONLINE) to 050.b.
Example 31	TRUE	prefix	Preface 050.a with (ONLINE).
Example 32	TRUE	copyField	Copy the 001 field to the 035 field.
Example 33	TRUE	copyField	Copy the 035 field to the 982 field.
Example 34	TRUE	addSystemNumber	Add System Number 035.a from 001 prefixed by 003.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 35	TRUE exists TRUE	removeField changeField	Delete the 035 field that starts with (OCoLC) and then change the existing 035 field to 996 using the priority factor, which must be used when a rule contains multiple rules.
Example 36	TRUE exists	removeField	Delete the the 900 field when it contains $a Local as in the figure below.
Example 37	TRUE exists	copyField	Copy field 24514 to the 90299 field. Only the 24514 is copied. If the 245 has other indicators it is not copied.
Example 38	TRUE exists	copyField	Copy field 24514 to the 90214 field. Only 24514 is copied. If the 245 has other indicators it is not copied.
Example 39	TRUE exists	copyField	Copy field 24514 to the 902 field with no indicators. Only 24514 is copied. If the 245 has other indicators it is not copied.
Example 40	TRUE	copyField	Copy the 300 field to the 901 field. The 300 field is copied regardless of whether or not it has indicators and regardless of what the indicators are.
Example 41	TRUE	copyField	Copy the 300 field to the 90112 field. The 300 field is copied regardless of whether or not it has indicators and regardless of what the indicators are.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 42	existsControl	replaceControlContents	Change the blank in position 17 of the leader (LDR) field to an `i`.
Example 43	existsControl	replaceControlContents	Change the `u` in position 17 of the leader (LDR) field to `8`.
Example 44	TRUE	copyField	Copy 245 only subfield c to 900 subfield b.
Example 45	TRUE	removeField	Remove the 866 only if the 866 subfield 8 does not have a 0 or a 99 in it. The pipe is now a Boolean OR.
Example 46	not exists	addField	If you want to use the pipe as a pipe to add a field, you need to add \\\ (three backslashes) before it. If you want to use the pipe as a pipe and check if it is in a field, you need to add \\\\ (four backslashes) before it.
Example 47	TRUE not exists	removeField	Delete the 866 fields if they have a subfield x or a subfield z.
Example 48	exists not exists	addField	Add field 901 if the 900 field exists with `Architecture` or `Design` in subfield a. Use a pipe for the OR.
Example 49	TRUE	removeControlField	Remove control field 009 from a record unequivocally.

Table 33. Normalization Rule Examples Overview and Links

Link to Example	Condition	Consequence	Action
Example 50	TRUE	changeSubFieldOnlyFirst	Change the first occurrence of the 040 subfield d to subfield a and do not change the other ones.
Example 51	existsControl	addField	Add field 900 with subfield a `Govt. Doc` if the 008 has a `u` in position 17 and an `f` in position 21.

Example 1

Add field 901 with $$a with the text Architecture Dept if it does not exist.

```
rule "Add field 901 with sub field a with text Architecture
Dept. if it doesnt exist"
when
  not exists "901.a.Architecture Dept"
then
  addField "901.a.Architecture Dept"
end
```

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Example 2

Add field 901 with $$a with the text Architecture Dept only if the 902 $$b contains 034-ARC.

```
rule "Add field 901 with sub field a with text Architecture
Dept. only if 902 $$b has 034-ARC"
when
  ((exists "902.b.034-ARC") AND (not exists
"901.a.Architecture Dept"))
then
  addField "901.a.Architecture Dept"
end
```

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Example 3

Remove $$b and $$c from the 260 field.

```
rule "Remove subfields b and c from 260"
when
  (TRUE)
then
  removeSubField "260.b"
  removeSubField "260.c"
end
```

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Example 4

Replace the text apple with the text orange in the 650 $$a (unconditionally).

```
rule "Replace text apple with orange in 650 $$a
(unconditional)"
when
  (TRUE)
then
  replaceContents "650.a.apple" with "orange"
end
```

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Example 5

Replace the text apple with the text orange in any subfield of the 650 field (unconditionally).

```
rule "Replace text apple with orange in 650 any subfield
(unconditional)"
when
  (TRUE)
then
  replaceContents "650.*.apple" with "orange"
end
```

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Example 6

Replace the text apple with the text orange in 650 $$a only if the 049 has $$a OCM.

```
rule "Replace text apple with orange in 650 $$a only if 049
has $$a OCM"
when
  (exists "049.a.OCM")
then
  replaceContents "650.a.apple" with "orange"
end
```

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Example 7

Replace the text apple with the text orange in 650 $$a only if the 049 does not have $$a OCM.

```
rule "Replace text apple with orange in 650 only if 049 does
not have $$a OCM"
when
  (not exists "049.a.OCM")
then
  replaceContents "650.a.apple" with "orange"
end
```

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Example 8

Add $$h to the 245 field with the text [Journal] (unconditionally).

```
rule "Add subfield h to 245 with text [Journal]
(unconditional)"
when
  (TRUE)
then
  addSubField "245.h.[Journal]" if (not exists
"245.h.[Journal]")
end
```

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Example 9

Add $$h to the 245 field with the text [Journal] if there is no $$h.

```
rule "Add subfield h to field 245 with text [Journal] if there
is no subfield h"
when
  (TRUE)
then
  addSubField "245.h.[Journal]" if (not exists "245.h")
end
```

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Example 10

Add field 999 with $$a CR_RESTRICTED if it does not exist.

```
rule "Add data field 999 with subfield a = CR_RESTRICTED if it
doesnt exist"
when
  (not exists "999.a.CR_RESTRICTED")
then
  addField "999.a.CR_RESTRICTED"
end
```

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Example 11

Copy the 035 $$b to the 035 $$a.

```
rule "Copy 035 subfield b to 035 subfield a"
when
  (TRUE)
then
  changeSubField "035.b" to "a"
end
```

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Example 12

Copy the 035 $$b to the 035 $$a if it does not exist with the prefix (YBP).

```
rule "Copy 035 subfield b to 035 subfield a if it doesnt
exist, prefix with (YBP)"
when
  (TRUE)
then
  prefix "035.b" with "(YBP)" if (not exists "035.b.*YBP*")
  changeSubField "035.b" to "a" if (not exists "035.a")
end
```

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Example 13

Create 245 $$h [Video] if position 6 of the LDR is g.

```
rule "Create 245 $$h [Video]   if position 6 of LDR is g"
when
  ((existsControl "LDR.{6,1}.g") AND (not exists
"245.h.*[Video]*"))
then
  replaceContents "245.h.*" with "[Video]"
  addSubField "245.h.[Video]" if (not exists "245.h")
end
```

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Example 14

Create 041 $$a with `ger` if position 35-37 in the 008 field is `ger`.

```
rule "Create 041 subfield a with ger if position 35-37 in 008
is ger"
when
  ((existsControl "008.{35,3}.ger") AND (not exists
"041.a.ger"))
then
  addField "041.a.ger"
end
```

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Example 15

Add $$h to the 245 field with the text [Journal] if there is not $$h in the 245 field and 022 exists or position 7 in the LDR is s.

```
rule "Add subfield h to field 245 with text [Journal] if there
is no subfield h in field 245 and 022 exists or pos.7 in LDR =
s"
when
  ((existsControl "LDR.{7,1}.s") OR (exists "022"))
then
  replaceContents "245.h.*" with "[Journal]"
  addSubField "245.h.[Journal]" if (not exists "245.h")
end
```

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Example 16

Add the 940 field with the first indicator of 1, the second indicator empty, and $$a with the text YBPDDA.

```
rule "Add field 940 with 1st indicator =1, second indicator
empty, subfield a with text YBPDDA"
when
  (TRUE)
then
  addField "940.{1,-}.a.YBPDDA"
end
```

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Example 17

Change the second indicator of the 856 field to 0 (zero) if its value is 1 (one).

```
rule "Change second indicator of field 856 to 0 if its value
is 1"
when
  (TRUE)
then
  changeSecondIndicator "856" to "0" if (exists "856.{*,1}")
end
```

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Example 18

Move the 001 field to the 009 field.

```
rule "Move field 001 to 009"
when
(TRUE)
then
changeControlField "001" to "009"
end
```

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Example 19

Move the 001 field to the 009 field if 009 does not already exist.

```
rule "Move field 001 to 009"
when
(not existsControl "009")
then
changeControlField "001" to "009"
end
```

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Example 20

Move the 300 field to the 901 field.

```
rule "Move field 300 to 901"
when
(TRUE)
then
changeField "300" to "901"
end
```

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Example 21

Add the 0820 field with $$a with the text 296.5 YLK if it does not already exist in either the 082 or the 0820.

```
rule "Add field 0820 with subfield a with text 296.5 YLK if it
doesnt already exist in either 082 or 0820"
when
((not exists "082.{0,-}.a.296.5 YLK") AND (not exists
"082.a.296.5 YLK"))
then
addField "082.{0,-}.a.296.5 YLK"
end
```

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Example 22

Replace position 6 of the LDR field with `e` if the 245 $$h is `[Map]` or `[Carte]`.

```
rule "edit LDR pos 6 for maps"
when
((exists "245.h.[Map]") OR (exists "245.h.[Carte]"))
then
replaceControlContents "LDR.{6,1}" with "e"
end
```

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Example 23

Replace position 6 of the LDR field with `e` if the 245 $$h is `[Map]` or `[Carte]` and the position 6 of the LDR field is `a`.

```
rule "edit LDR pos 6 for maps"
when
((exists "245.h.[Map]") OR (exists "245.h.[Carte]"))
then
replaceControlContents "LDR.{6,1}.a" with "e"
end
```

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Example 24

Replace position 6 of the LDR field with `e` all the time.

```
rule "edit LDR pos 6 for maps"
when
(TRUE)
then
replaceControlContents "LDR.{6,1}" with "e"
end
```

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Example 25

Delete all the 9XX fields.

```
rule "Remove all 9XX"
when
(TRUE)
then
removeField "9*"
end
```

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Example 26

Delete all the 92X fields.

```
rule "Remove all 92X"
when
(TRUE)
then
removeField "92*"
end
```

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Example 27

Delete all the 035 fields which start with (MBU) and end with 01bosu.

```
rule "delete the 035 Starts with (MBU)Ends with 01bosu"
when
TRUE
then
removeField "035" if(exists "035.*.(MBU)*01bosu")
end
```

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Example 28

Remove the existing 100 field and add a new 100 field with 1001 $$a Smith, John $$d1971-.

```
rule "remove data field 100 and add new one"
when
(TRUE)
then
removeField "100"
addField "100.{1,-}.a.Smith, John"
addSubField "100.d.1971-"
end
```

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Example 29

Remove $$b from the 900 field.

```
rule "remove subfield b from 900 field"
when
(TRUE)
then
removeSubField "900.b"
end
```

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Example 30

Append (ONLINE) to 050.b.

```
rule "Suffix 050.b with (ONLINE) if not already"
when
(TRUE)
then
suffix "050.b" with " (ONLINE)" if (not exists "050.b.*ONLINE")
end
```

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Example 31

Preface 050.a with (ONLINE).

```
rule "Prefix 050.a with (ONLINE) if not already"
when
(TRUE)
then
prefix "050.a" with "(ONLINE)" if (not exists "050.a.ONLINE")
end
```

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Example 32

Copy the 001 field to the 035 field.

```
rule "Copy 001 Field to 035 Field"
when
(TRUE)
then
copyField "001" to "035.a"
end
```

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Example 33

Copy the 035 field to the 982 field.

```
rule "copy 035 Field to 982 Field"
when
(TRUE)
then
copyField "035" to "982.a"
end
```

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Example 34

Add System Number 035.a from 001 prefixed by 003.

```
rule "Add system number 035.a from 001 prefixed by 003"
when
(TRUE)
then
addSystemNumber "035.a" from "001" prefixed by "003"
end
```

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Example 35

The following rule first deletes the 035 field that starts with (OCoLC) and then changes the existing 035 field to 996 using the priority factor, which must be used when a rule contains multiple rules. Note that actions stipulated in the rule with the higher priority are performed first. For example, the action in the rule with priority 2 below is performed before the action in the rule with priority 1.

```
rule "delete the 035 Starts with (OCoLC)"
priority 2
when
TRUE
then
removeField "035" if (exists "035.a.(OCoLC)*")
end

rule "change 035 to 996"
priority 1
when
TRUE
then
changeField "035" to "996"
end
```

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Example 36

Use the rule below to delete the the 900 field when it contains $a Local as in the figure below.

NOTE:
This normalization rule will not delete any other 900 fields that exist.

```
rule "remove 900 field if it has subfield a with local"
when
(TRUE)
then
removeField "900" if (exists "900.a.Local")
end
```

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Example 37

Copy field 24514 to the 90299 field. Only the 24514 is copied. If the 245 has other indicators it is not copied.

```
rule "copy 24514 to 90299"
when
  TRUE
then
  copyField "245" to "902.{9,9}" if(exists "245.{1,4}")
end
```

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Example 38

Copy field 24514 to the 90214 field. Only 24514 is copied. If the 245 has other indicators it is not copied.

```
rule "copy 24514 to 90214"
when
  TRUE
then
  copyField "245" to "902.{1,4}" if(exists "245.{1,4}")
end
```

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Example 39

Copy field 24514 to the 902 field with no indicators. Only 24514 is copied. If the 245 has other indicators it is not copied.

```
rule "copy 24514 to 902"
when
  TRUE
then
  copyField "245" to "902{ , }" if(exists "245.{1,4}")
end
```

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Example 40

Copy the 300 field to the 901 field. The 300 field is copied regardless of whether or not it has indicators and regardless of what the indicators are.

```
rule "copy 300 to 901"
when
  TRUE
then
  copyField "300" to "901"
end
```

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Example 41

Copy the 300 field to the 90112 field. The 300 field is copied regardless of whether or not it has indicators and regardless of what the indicators are.

```
rule "copy 300 to 90112"
when
  TRUE
then
  copyField "300" to "901.{1,2}"
end
```

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Example 42

Use the following normalization rule to change the blank in position 17 of the leader (LDR) field to an `i`.

NOTE:
The # symbol displays in Alma to represent blanks in fixed fields.

```
rule "edit LDR pos 17 to i when blank"
when
   existsControl "LDR.{17,1}. "
then
   replaceControlContents "LDR.{17,1}" with "i"
end
```

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Example 43

Use the following normalization rule to change the `u` in position 17 of the leader (LDR) field to `8`.

```
rule "edit LDR pos 17 to 8 when u"
when
   existsControl "LDR.{17,1}.u"
then
   replaceControlContents "LDR.{17,1}" with "8"
end
```

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Example 44

Copy 245 only subfield c to 900 subfield b.

```
rule "copy 245 subfield c to 900 subfield b"
when
   TRUE
then
   copyField "245.c" to "900.b"
end
```

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Example 45

Use the following to remove the 866 only if the 866 subfield 8 does not have a 0 or a 99 in it.

The pipe is now a Boolean OR.

```
rule "remove 866 except for ones which have a 0 or a 99 in the
subfield 8"
when
(TRUE)
then
removeField "866" if (not exists "866.8.0|99")
end
```

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Example 46

If you want to use the pipe as a pipe to add a field, you need to add \\\ (three backslashes) before it.

If you want to use the pipe as a pipe and check if it is in a field, you need to add \\\\ (four backslashes) before it.

```
rule "Add 491 1 $$a P|pes in code if it does not already
exist"
when
not exists "490.{1,-}.a.P\\\\|pes in code"
then
        addField "490.{1,-}.a.P\\\|pes in code"
end
```

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Example 47

Use the following to delete the 866 fields if they have a subfield x or a subfield z.

```
rule "one"
when
(TRUE)
then
removeField "866" if (exists "866.x")
end
rule "two"
when
(TRUE)
then
removeField "866" if (exists "866.z")
end
```

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Example 48

Use the following to add field 901 if the 900 field exists with `Architecture` or `Design` in subfield a. Use a pipe for the OR.

```
rule "Add field 901 if 900 exists with Architecture or Design
in subfield a"
when
((exists "900.a.Design|Architecture") AND (not exists
"901.a.248365-613"))
then
addField "901.{-,-}.a.248365-613"
end
```

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Example 49

Use the following to unequivocally remove the control field 009 from a record.

```
rule "remove 009"
when
(TRUE)
then
removeControlField "009"
end
```

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Example 50

Use the following to change the first occurrence of the 040 subfield d to subfield a and do not change the other ones.

```
rule "change the first occurrence of 040 subfield d to a and
do not change the other ones"
when
(TRUE)
then
changeSubFieldOnlyFirst "040.d" to "a"
end
```

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Example 51

Use the following to add field 900 with subfield a `Govt. Doc` if the 008 has a `u` in position 17 and an `f` in position 21.

```
rule "Add field 900 with subfield a Govt. Doc if 008 has a u in
pos 17 and an f in pos 21"
when
existsControl  "008.{17,1}.u" AND existsControl  "008.{28,1}.f"
then
addField "900.a.Govt. Doc" if (not exists "900.a.Govt. Doc")
end
```

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Working with Merge Rules

PERMISSIONS:

To work with merge rules, you must have the following role:

- Catalog Administrator

The MD Editor enables catalogers to create merge rules and apply them to MARC 21 records, or apply merge rules that have already been created. The syntax to be used for the rules is described in **Merge Rules - Syntax and Examples** on page **258**.

When merging two records, one is the preferred record and the other is the non-preferred record. The preferred record serves as the basis for the merged record and the merge rules remove, add, and/or replace fields in the preferred record with values from the non-preferred record.

The identity of the preferred and non-preferred records differs depending on whether you are importing records using an import profile or copy cataloging via an external resource:

- When importing MARC records using an import profile (see **Managing Profiles for Record Imports** on page **511** or **Importing Records from OCLC Connexion** in the *Alma Integrations with External Systems Guide* for details), the preferred record is the local record in Alma. The local Alma record serves as the basis for the merged record. Fields from the incoming record are taken and merged into the existing, local metadata according to the merge rules defined. For example, if a merge rule stipulates the addition of the 650 field, the 650 field is taken from the incoming record and added to the existing, local Alma record.
- When copy cataloging via an external resource (such as WorldCat or LoC), the preferred record is the incoming external record. The incoming record serves as the basis for the merged record. Fields from the local Alma record are taken and merged into the incoming record metadata according to the merge rules defined. For example, if a merge rule stipulates the addition of the 650 field, the 650 field is taken from the local Alma record and added to the incoming external record.

Because the merge methods for import profiles and copy cataloging work in opposite ways, a merge rule written for an import profile cannot work for copy cataloging (and vice versa). You therefore require two sets of merge rules—one for import profiles and another for copy cataloging. An example of each type of rule can be found in **Examples of Rules for Import Profiles and Copy Cataloging** on page **258**.

A merge rule file contains one rule that specifies one or more actions that apply to the merged record. Each action can be performed unconditionally or may be subject to a condition on the preferred record. The order of the actions specified is important, as it impacts the intended end result.

To create a merge rule:

1 On the MD Editor page (**Resource Management** > **Cataloging > Open Metadata Editor**), click the **Rules** tab. The Merge Rules folder is displayed.

Figure 169: Rules Tab

2 Select **File > New > Merge rules** and enter your merge rule properties in the Normalization Rule Properties dialog box.

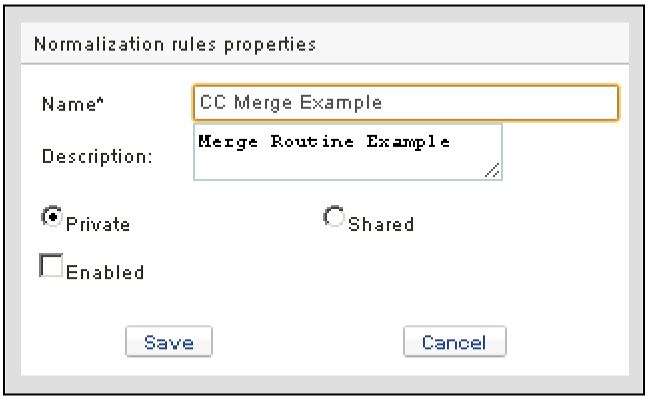


Figure 170: Merge Rule Properties

3 Click **Save**. The rules editor opens.

4 Enter your rule details.

a Select **Edit > Add Rule > Merge Snippet custom rule**. This provides an initial template for entering your merge rule.

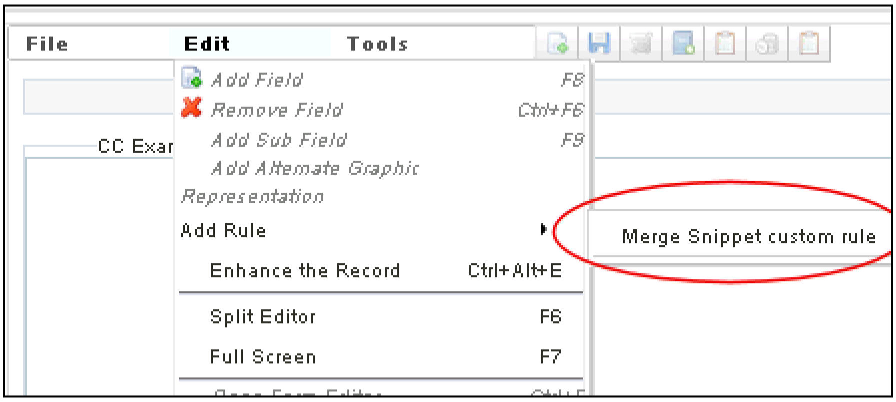


Figure 171: Merge Snippet Custom Rule

b Enter the specific information for your merge rule. For information on the syntax to be used, see **Merge Rules - Syntax and Examples** on page 258.

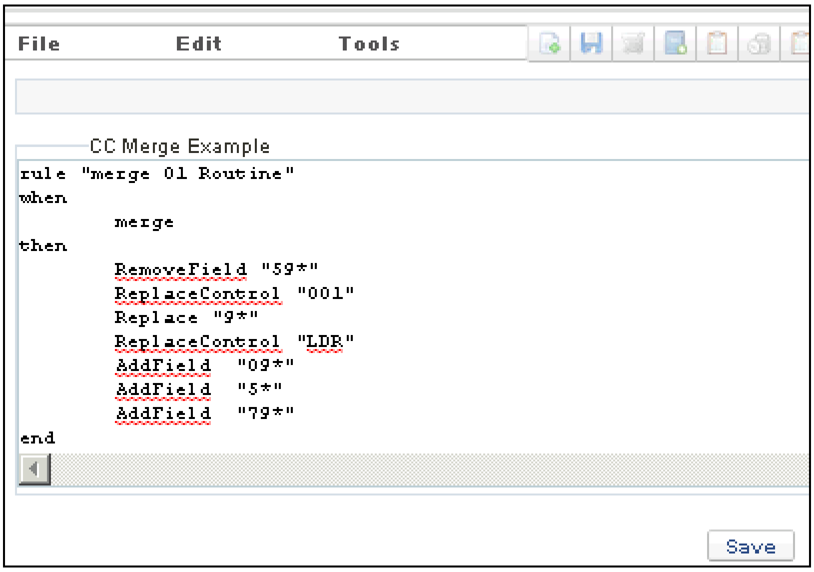


Figure 172: Merge Rule Details

5 Click **Save**. The saved merge rules display in the Rules tab.

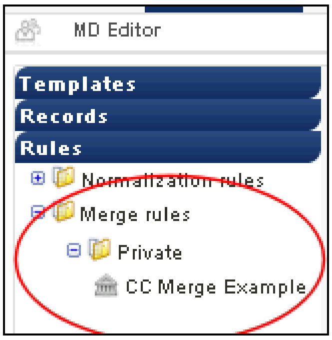


Figure 173: Saved Merge Rules

The saved merge rules can be edited, deleted, and duplicated (to create new merge rules).

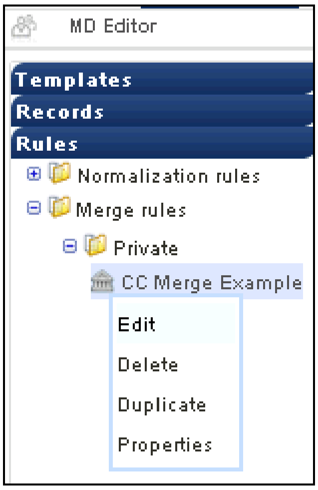


Figure 174: Saved Merge Rule Options

NOTE:
Unlike normalization rules, merge rules cannot be previewed.

Merge Rules - Syntax and Examples

The merge rules follow a specific syntax. See the examples below.

Examples of Rules for Import Profiles and Copy Cataloging

Below are examples of merge rules that can be used in a scenario such as the following: You have a record in Alma containing basic metadata, most of which you want to replace with metadata from the incoming record. However, for the following fields, you want to keep the local record metadata: 001, 019, 035, 59X, 9XX.

You would use a merge rule such as the following for import profiles:

```
rule "Replace all fields except local data and match keys"
when
merge
then
replace MARC.XXX excluding "001,019,035,59X,9XX"
end
```

You would use a merge rule such as the following for copy cataloging:

```
rule "Replace all fields except local data and match keys"
when
merge
then
replace MARC."001"
replace MARC."035"
replace MARC."019"
replace MARC."59"X
replace MARC."9"XX
end
```

Rule Syntax

Conditions and actions apply to record elements, such as the MARC record, fields (one or more), indicators, subfields (one or more), and field/subfield contents.

Conditions apply to the preferred record elements. To apply an action to a record element, the element must match the syntax in the table below.

Table 34. Merge Rule Syntax

Expression	Meaning
`remove MARC."{prefix}"X`	Removes the fields prefixed by `{prefix}`. For example, the following removes all fields between 920 and 929: `remove MARC."92"X`
`remove MARC."{prefix}"XX`	Removes the fields prefixed by `{prefix}`. For example, the following removes all fields between 900 and 999: `remove MARC."9"XX`

Table 34. Merge Rule Syntax

Expression	Meaning
`remove MARC."{tag}"`	Removes the field specified in the `{tag}`. For example, the following removes the 950 field: `remove MARC."950"`
`remove MARC."{prefix}"X excluding "{list}"`	Removes the fields prefixed by `{prefix}`, excluding the specified list of fields. For example, the following removes all fields between 990 and 999, except 990 and 991: `remove MARC."99"X excluding "990,991"`
`remove MARC."{prefix}"XX excluding "{list}"`	Removes the fields prefixed by `{prefix}`, excluding the specified list of fields. For example, the following removes all fields between 900 and 999, except 950 and 951: `remove MARC."9"XX excluding "950,951"`
`replace MARC."{tag}" if exists`	Replaces the content of the field specified in the `{tag}` only if the field exists. If the field does not exist, it is not added. For example, the following replaces the 950 field, if the field exists: `replace MARC."950" if exists`
`replace MARC."{tag}"`	Replaces the content of the field specified in the `{tag}`. If the field does not exist, it is added. For example, the following replaces the 950 field: `replace MARC."950"`
`replace MARC."{prefix}"X if exists`	Replaces the content of the fields prefixed by `{prefix}` if these fields exist. If these fields do not exist, they are not added. For example, the following replaces all fields between 920 and 929, if these fields exist: `replace MARC."92"X if exists`
`replace MARC."{prefix}"X`	Replaces the content of the fields prefixed by `{prefix}`. If these fields do not exist, they are added. For example, the following replaces all fields between 920 and 929: `replace MARC."92"X`

Table 34. Merge Rule Syntax

Expression	Meaning
`replace MARC."{prefix}"XX if exists`	Replaces the content of the fields prefixed by `{prefix}` if these fields exist. If these fields do not exist, they are not added. For example, the following replaces all fields between 900 and 999, if these fields exist: `replace MARC."9"XX if exists`
`replace MARC."{prefix}"XX`	Replaces the content of the fields prefixed by `{prefix}`. If these fields do not exist, they are added. For example, the following replaces all fields between 900 and 999: `replace MARC."9"XX`
`replace MARC."{prefix}"X excluding "{list}"`	Replaces the content of the fields prefixed by `{prefix}`, excluding the specified fields. For example, the following replaces the content of all fields between 990 and 999, except that of 990 and 991. Note that if the fields do not exist, they are created: `replace MARC."99"X excluding "990,991"`
`replace MARC."{prefix}"XX excluding "{list}"`	Replaces the content of the fields prefixed by `{prefix}`, excluding the specified fields. For example, the following replaces the content of all fields between 900 and 999, except that of 950 and 951. Note that if the fields do not exist, they are created: `replace MARC."9"XX excluding "950,951"`
`replace MARC.XXX excluding "{list}"`	Replaces the content of all MARC fields, excluding the specified fields. For example, the following replaces the content of all fields in the non-preferred record with that of the preferred record, except for the specified fields. Note that if the fields do not exist, they are created: `replace MARC.XXX excluding "100,245,9XX,5XX"`

Table 34. Merge Rule Syntax

Expression	Meaning
`replace MARC."{prefix}"X excluding MARC."{exclTag}"("{exclInd1}","{exclInd2}")`	Replaces the content of fields prefixed by `{prefix}`, excluding the specified fields and indicators. For example, the following replaces the content of all fields between 990 and 999, except for MARC field 995(0,1). Note that MARC field 995(1,1) is replaced. If the fields do not exist, they are created: `replace MARC."99"X excluding MARC."995"("0","1")`
`replace MARC."{prefix}"XX excluding MARC."{exclTag}"("{exclInd1}","{exclInd2}")`	Replaces the content of fields prefixed by `{prefix}`, excluding the specified fields and indicators. For example, the following replaces the content of all fields between 900 and 999, except for MARC field 995(0,1). Note that MARC field 995(1,1) is replaced. If the fields do not exist, they are created: `replace MARC."9"XX excluding MARC."995"("0","1")`
`replace MARC."{tag}" excluding MARC."{exclTag}"("{exclInd1}","{exclInd2}")`	Replaces the field specified in the `{tag}`, excluding the specified fields and indicators. For example, the following replaces the 995 field, except for 995(0,1). Note that MARC field 995(1,1) is replaced. If the field does not exist, it is created: `replace MARC."995" excluding MARC."995"("0","1")`
`replace MARC.XXX excluding MARC."{exclTag}"("{exclInd1}","{exclInd2}")`	Replaces the content of all MARC fields, excluding the specified fields and indicators. For example, the following replaces the content of all fields in the non-preferred record with that of the preferred record, except for 995(0,1). Note that MARC field 995(1,1) is replaced. If the field does not exist, it is created: `replace MARC.XXX excluding MARC."995"("0","1")`

Table 34. Merge Rule Syntax

Expression	Meaning
`replace MARC."{tag}" when MARC."{condtag}"."{condsf}" does not contain "{condstring}" excluding MARC."{exclTag}"("{exclInd1}","{exclInd2}")`	Replaces the field specified in the `{tag}` when the stipulated field/subfield does not contain the specified string, except in the case of the stipulated field and indicators. For example, the following replaces the 995 field when 995a does not contain the text "history." 995(0,1) is not replaced, but 995(1,1) is replaced. If the field does not exist, it is created: `replace MARC."995" when MARC."995"."a" does not contain "history" excluding MARC."995"("0","1")`
`replace MARC.control."{ctrl}"`	Replaces the specified MARC control field. For example, the following replaces the content of the MARC 008 control field in the non-preferred record with that of the preferred record. If the field does not exist, it is created: `replace MARC.control."008"`
`add MARC."{tag}"`	Adds the content of the field specified in the `{tag}`. For example, the following adds the content of the 950 field: `add MARC."950"`
`add MARC."{tag}"("{ind1}","{ind2}")`	Adds the content of the field specified in the `{tag}`, as well as the stipulated indicators. For example, the following adds the content of the 950 field, with indicators 0 and 1: `add MARC."950"("0","1")`
`add MARC."{tag}" if does not exists`	Adds the content of the field specified in the `{tag}` if this field does not already exist. For example, the following adds the 950 field if this field does not already exist: `add MARC."950" if does not exists`
`add MARC."{prefix}"X`	Adds the content of the fields prefixed by `{prefix}`. For example, the following adds the content of all fields between 920 and 929: `add MARC."92"X`

Table 34. Merge Rule Syntax

Expression	Meaning
`add MARC."{prefix}"XX`	Adds the content of the fields prefixed by `{prefix}`. For example, the following adds the content of all fields between 900 and 999: `add MARC."9"XX`
`add MARC."{prefix}"X excluding "{list}"`	Adds the content of the fields prefixed by `{prefix}`, excluding the specified fields and subfields. For example, the following adds the content of all fields between 990 and 999, except that of 990 and 991: `add MARC."99"X excluding "990,991"`
`add MARC."{prefix}"XX excluding "{list}"`	Adds the content of the fields prefixed by `{prefix}`, excluding the specified fields and subfields. For example, the following adds the content of all fields between 900 and 999, except that of 950 and 951: `add MARC."9"XX excluding "950,951"`
`add MARC."{tag}" when MARC."{condtag}"."{condsf}" contains "{condstring}"`	Adds the field specified in the `{tag}` when the stipulated field/subfield contains the specified string. For example, the following adds the 950 tag only if the 250.a field contains the text "history." `add MARC."950" when MARC."250"."a" contains "history"`

Searching External Resources

Alma supports copy cataloging by integrating the search and import of records located in external databases directly into the MD Editor. External databases can be searched from within the MD Editor interface, and records displaying in the results of the searches can be imported directly into Alma from the search results screen. In addition, Alma can search your repository for records that match the imported record, merge the variant records into a single record, or overlay the existing record with the imported record.

NOTE:

To define the correct match profile to be used, you must include the appropriate file key in the `serial_match_profile` and `non_serial_match_profile` Parameter Value column (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**). For detailed information on these file keys, see the table in **Configuring Other Settings** on page **695**.

The external search, therefore, enables you to search external bibliographic databases and view and select relevant records before importing them into the repository.

The search external resources function is available from the Alma menu, in addition to the MD Editor. When you have a record selected in the MD Editor and perform a search of external resources, the split editor option is automatically activated, and the relevant search fields are automatically populated with information from the current record in view.

To search external resources:

1. Select **Cataloging > Search External Resources** from the **Resource Management** menu, or in the MD Editor, select **Tools > Search External Resources**.

   The MD Editor Search External Resources page opens.

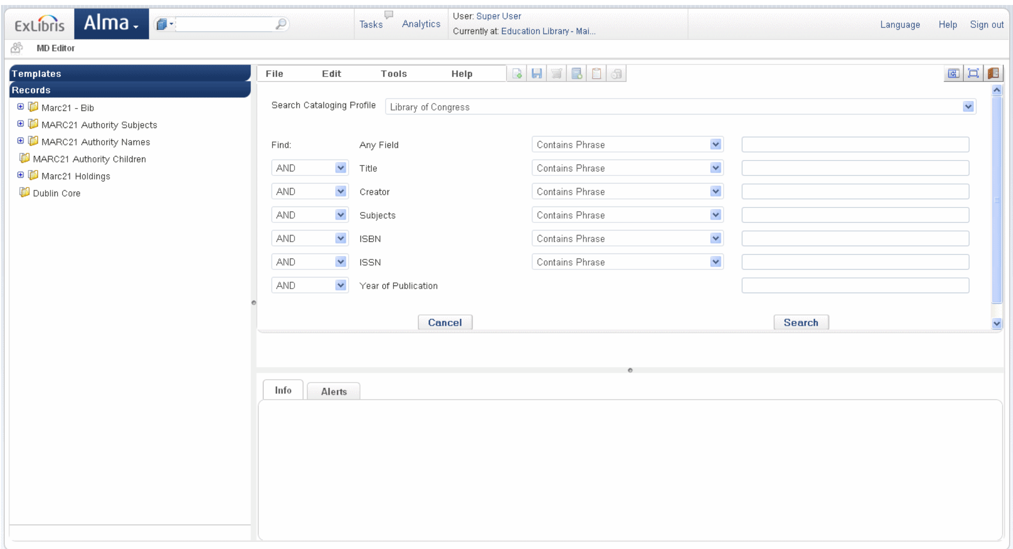


Figure 175: MD Editor Search External Resources Page

If there was a draft open in edit mode and the external resources search was accessed from the Tools menu, the search fields are automatically populated with search terms from the draft record, as shown in the following example.

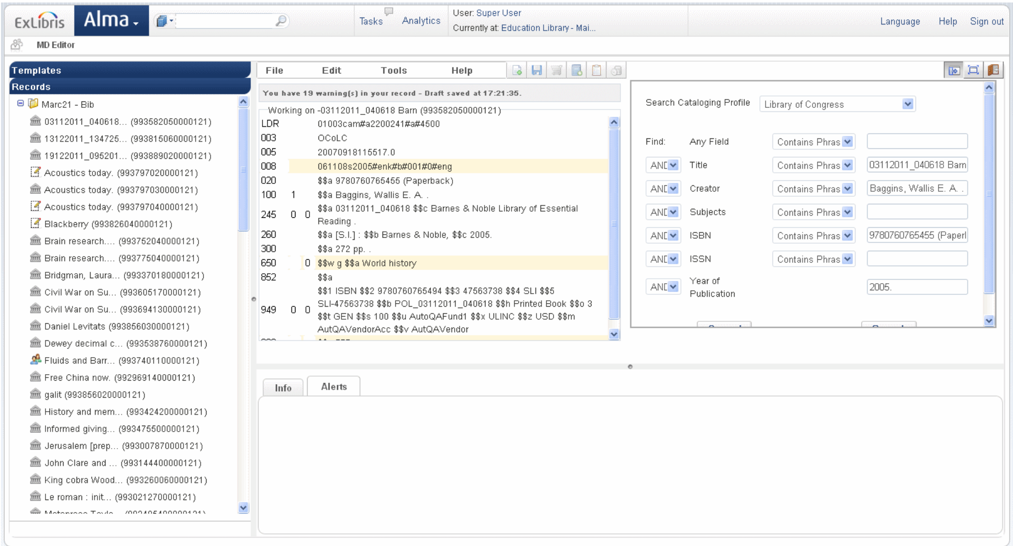


Figure 176: MD Editor Search External Resources Page Record Selected

2 From the **Search Cataloging Profile** drop-down list, select one of the predefined search profiles. For details on defining a search profile, see **External System Search** in the *Alma Integrations with External Systems Guide*.

3 Enter the search values in any of the available fields according to the field name and select the required input expectation for the fields that you enter. You can select the input expectations from:

- Contains Phrase
- Contains Keywords
- Starts With

NOTE:
The Year of Publication field must contain four digits.

4 Select whether you want each of the search fields to have **And/Or** options between them.

5 Click **Search**. The MD Editor External Search page refreshes and shows the results of the search.

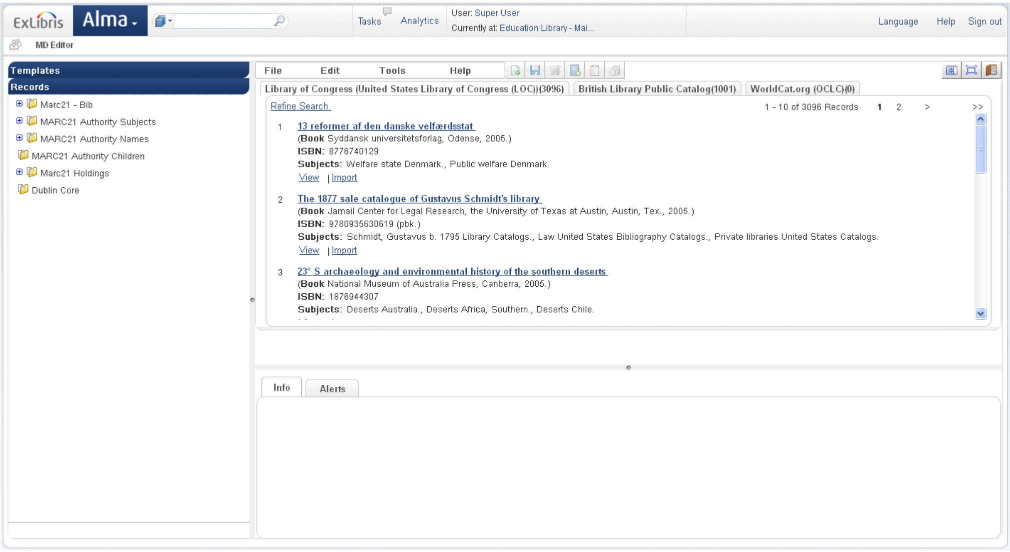


Figure 177: External Search Results Page

In the above example, the results from the external search are shown in the tab of the Search Cataloging Profile that you chose in step 2. If there are additional external databases configured, tabs for these databases are displayed. If you want to perform the search on one of these database, click the tab for the database and execute the search.

NOTE:
The **Held by** indication is displayed for OCLC (WorldCat) records only.

6 To view the bibliographic record details of an item on the External Search Results page, click the title of the item or click the **View** link beneath the title. The MD Editor page refreshes as follows:

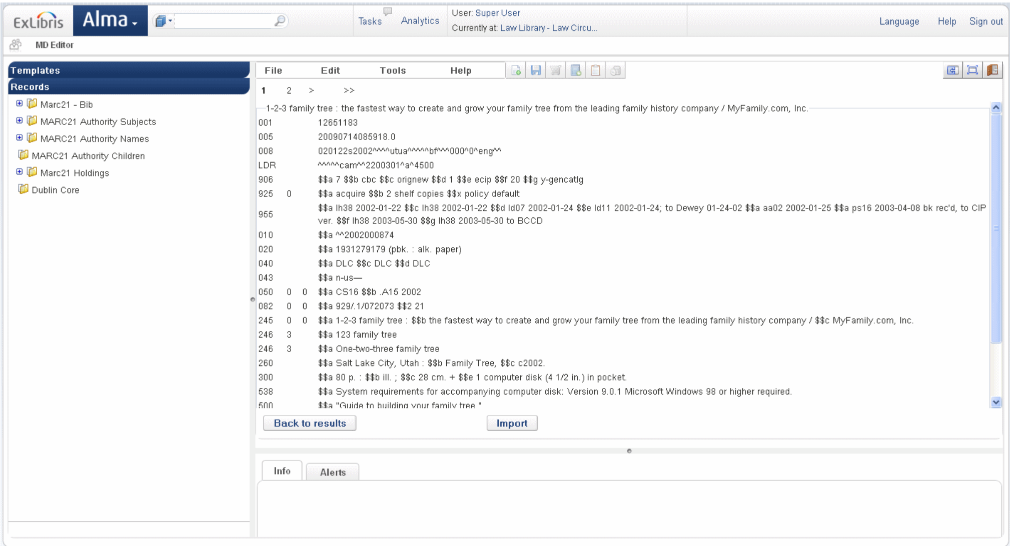


Figure 178: External Search Results, View Bibliographic Record

Click **Back to Results** to return to the External Search Results page.

7 To import the bibliographic record of an item on the External Search Results page, click the **Import** link beneath the title; or if you are viewing the bibliographic record details (step 6), click **Import**. The bibliographic record is imported into the Drafts folder of the editor (and has a Drafts icon next to it), where you can manipulate it like any other bibliographic record.

Mapping Call Numbers to Holdings

PERMISSIONS:

To customize the mapping rules, you must have one of the following roles:

- Cataloger Administrator
- General System Administrator

The Call Number Mapping mapping table allows you to customize the way call number information maps from the bibliographic record to the holdings record. The following methods, which map call number information from the bibliographic records to the holdings records, utilize this mapping table:

- Save a new holdings record in the MD Editor. Note that the call numbers are not mapped to modified holding records unless you use one of the other methods.

- Run the **Update from Bibliographic** tool for a new or modified holdings record from the **Tools > MARC21 Holdings** menu in the MD Editor.
- Run an import profile job.

Alma uses the first matching row in the mapping table to map the call number for each record. To determine the matching row, Alma compares each record with each enabled mapping row (starting at the top of the table) and stops checking when a mapping row matches all of the following conditions:

1. The first indicator of the 852 field in the holdings record matches the indicator specified in the **852 Ist Ind** column of the mapping table.
2. If the first indicator of the 852 field in the holdings record is a 7, the value specified in the **852 Subfield 2** column must also match the corresponding value in the holdings record.
3. The MARC tag specified in the **Bib Field to Copy** column of the mapping record exists in the bibliographic record.

If a matching row is found, the fields and subfields specified in the **Bib Field Copy** and **Bib Subfields to Copy** columns are copied from the bibliographic record to the 852 subfields specified in the **852 Subfield Destinations** columns. If all conditions are not met, the system continues to the next row in the mapping table.

Out of the box, the mapping table uses the following rules to map the information:

- For the **0** indicator, replaces the h and i subfields with the content of the bibliographic record's 090 a and b subfields (respectively). If there is no 090 field in the bibliographic record, the 050 a and b subfields are used instead.
- For the **1** indicator, replaces the h and i subfields with the content of the bibliographic record's 082 a and b subfields (respectively).
- For the **2** indicator, replaces the h and i subfields with the content of the bibliographic record's 060 a and b subfields (respectively).
- For the **3** indicator, adds the h and i subfields with the content of the bibliographic record's 086 a and b subfields (respectively). If the h and i subfields are already populated, their values are left as is and not replaced.
- For the **8** indicator, adds the h subfield with a concatenation of the bibliographic record's 084 a subfield values. (If the h subfield is already populated, its value is left as is.) Also replaces the i subfield with a concatenation of the 084 b subfield values.

VIDEO:

For more information about mapping call numbers to holdings, see the *Call Number Mapping to Holdings Record* video (6:00 mins).

To add a call number mapping row:

1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Call Number Mapping** under **General**.

The Call Number Mapping page opens.

	Bib Field To Copy	Bib Subfields	852 1st Ind	852 Subfield 2	852 Subfield Dest
1	963??	k,h,i,m	1	-	k,h,i,m
2	098??	a,b,c,d	1	-	h,i,k,m
3	090??	a,b	0	-	h,i
4	050??	a,b	0	-	h,i
5	092??	a,b	1	-	h,i
6	082??	a,b	1	-	h,i
7	096??	a,b	2	-	h,i
8	060??	a,b	2	-	h,i
9	055??	a,b	7	cacodoc	h,i
10	070??	a,b	7	agricola	h,i
11	0860?	a,b	3	-	h,i
12	086??	a,b	8	-	h,i
13	null	-	9	-	-

Figure 179: Call Number Mapping Table

2 In the **Quick Add** section, enter the following fields and click **Add** to add a new mapping row to the bottom of the list:

- **Bib Field To Copy** – Enter the 5-digit field from which to map the call number from the bibliographic record to the holdings record. To specify wildcards, use a question mark (for example, **963??**). This is a required field.
- **Bib Subfields To Copy** – Specify which subfields are to be copied from the field specified in the **Bib Field to Copy** field to the holdings record.

Multiple subfields must be separated by a comma with no spaces. This is a required field.

- **852 1st Indicator** – Enter the value of the first indicator to be matched in the holdings record. This is a required field.
- **852 Subfield Destinations** – Enter the 852 subfields to which the call number is mapped in the holdings record. Multiple subfields must be separated by a comma with no spaces. This is a required field.
- **Description** – Enter an optional description for the rule.

3. Click the up and down arrows in the new mapping row to change the order in which the rule is checked.
4. Disable or delete any rules that are no longer needed.
5. Click **Save**.

5

Inventory

This section includes:

Introduction to Alma Inventory

Alma inventory provides you with the capability to manage the following types of resources:

- Electronic (see **Managing Electronic Resources** on page **279**)
- Digital (see **Managing Digital Resources** on page **426**)
- Physical (see **Managing Physical Resources** on page **446**)

Alma's inventory menu interface (Resource Management > Create Inventory), designed for non-catalogers, enables staff to enter library information for:

- Holdings
- Items
- Activated electronic resources
- Digital objects

Refer to the figure below for an illustration of the inventory component as it relates to the overall Alma architecture.

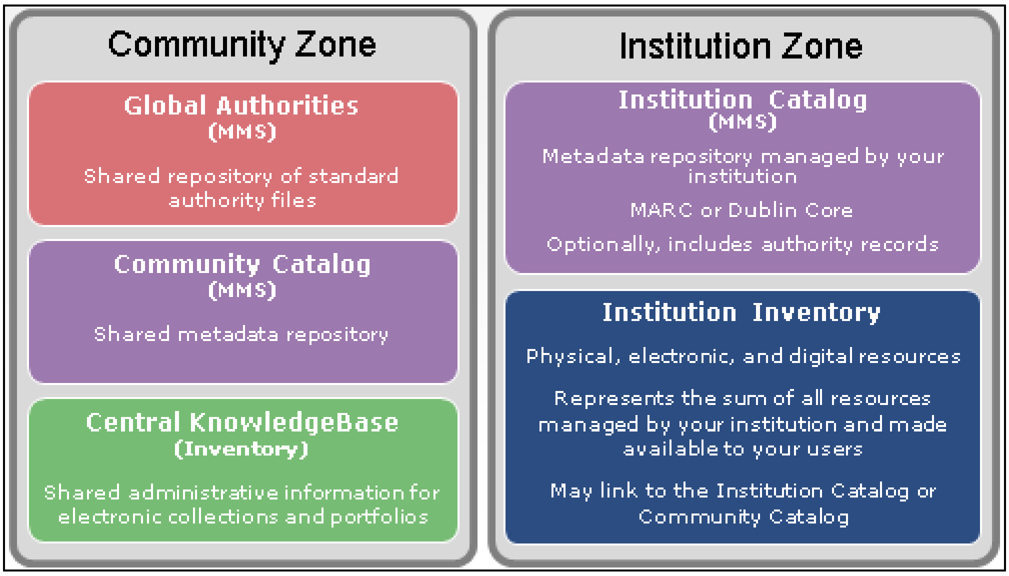


Figure 180: Alma Inventory for Resources

See the following links for related topics:

- **Alma Inventory Components** on page **274**
- **Alma Inventory Resource Type Examples** on page **275**
- **Linking Versus Copying** on page **278**
- **Managing Linked Electronic Records on Import** on page **278**

For information on the Alma Community Catalog—its scope, standards, policies, and merge logic, see *Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities*.

Alma Inventory Components

The basic Alma inventory design is comprised of the intellectual entity (IE), middle level, and item.

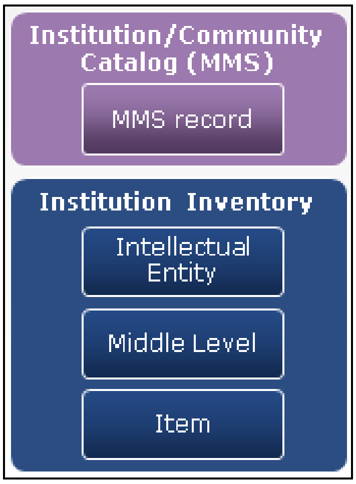


Figure 181: Basic Alma Inventory Design

Intellectual Entity (IE)

The IE is the resource that is managed that provides a pointer to the MMS record at the inventory level. Within Alma, the IE is mostly transparent and is not discoverable on its own, but allows Alma to point to a combination of community and institutional records from the local inventory.

Middle Level

The middle level of the inventory design serves as a grouping level for the different resource types. These are physical, electronic, and digital.

For the physical resource type, the middle level contains the holdings information such as the Main library or Law library holdings.

For the electronic resource type, the middle level contains the service information such as full text or selected full text.

For the digital resource type, the middle level contains the representation information such as master copy or derivative copy.

Item

The item is the inventory level for fulfillment and usage. This level of the inventory design contains information about the physical item, the electronic portfolio, or the digital file.

Alma Inventory Resource Type Examples

The following illustrations highlight examples of physical, electronic, and digital inventory resource types.

Physical

The following physical inventory example illustrates a book with three copies with holdings in the main stacks and off-site storage.

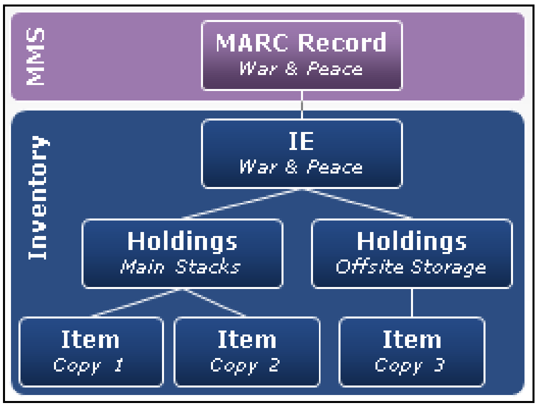


Figure 182: Inventory Physical Example (Books)

The following physical inventory example illustrates an ongoing serial with three issues with holdings in Periodicals.

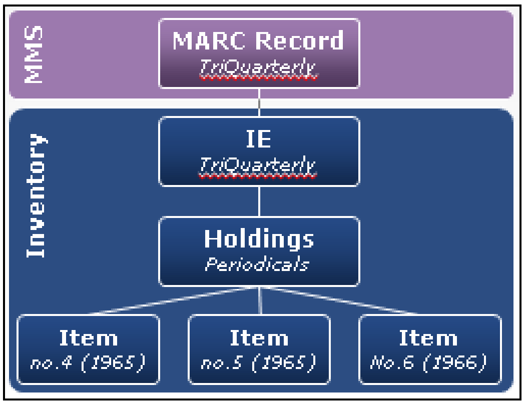


Figure 183: Inventory Physical Example (Serials)

NOTE:

At the item level, book copies are handled differently from serial issues. Each issue of a serial contains different content and is not generally interchangeable for fulfillment purposes. Book copies can be interchangeable for fulfillment purposes.

Electronic

For electronic inventories, Alma uses the concept of an electronic collection, which is the inventory unit that is purchased, activated, and maintained. The following example illustrates a single title that is offered by two vendors.

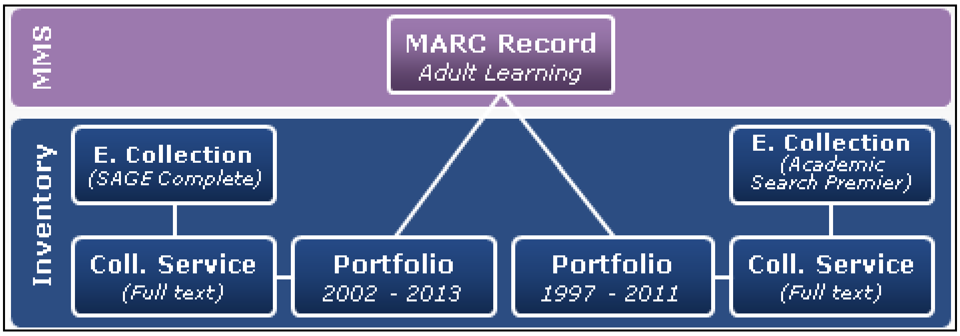


Figure 184: Inventory Electronic Example

When bibliographic data is sufficient in the Community Zone (CZ), you can have the resource and title list linked from the CZ on activation of your electronic collection. Activation can include a complete vendor bundle or specific titles for a selective service.

Linking through the CZ allows your local inventory to benefit from any changes to global access or descriptive information.

Digital

The following digital example illustrates a thesis with a master and a derivative representation.

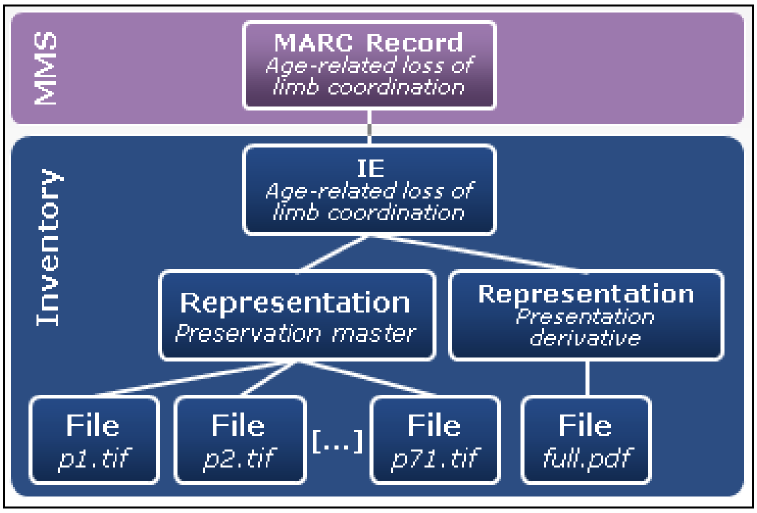


Figure 185: Inventory Digital Example

Linking Versus Copying

In Alma, inventory records are linked to metadata (MMS) records. The metadata records, when published, provide the discovery content for patrons seeking the inventory. The records in the Institution Zone are ideally linked to the global records in the Community Zone (CZ). With this inventory model, when the CZ records are updated, your institution benefits by being able to automatically access the updated information through the links between the Institution Zone and the CZ.

Alternately, you can copy records from the CZ (similar to copy cataloging from any other source). The record is copied directly to your Institution Zone catalog. The drawback to this method is that the link to the CZ is severed and the copied record does not participate in the updates made to the global version in the CZ.

Managing Linked Electronic Records on Import

To provide additional flexibility for linking metadata (MMS) content, Alma offers an option to unlink records when importing electronic resource records. E-resource records that are activated from the Community Zone (CZ) can, during an import to the Institution Zone, be unlinked and overlaid (or merged) with full MARC records. With this option, the portfolios remain linked to the CZ and benefit from any future CZ updates.

This function is implemented through the match profile (part of the import profile—see the procedure below). It applies to the Repository type of import profile and embedded order data (EOD) imports.

To configure the unlink option:

1. From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
2. From the Record Import section, click **Import Profiles**.
3. Edit an existing Repository type of import profile.
   a. From the filter drop-down list, select **Repository**.
   b. For the profile you want to modify, click **Actions > Edit**.
   c. Click the **Match Profile** tab.

      The new option displays in the Match Actions section.

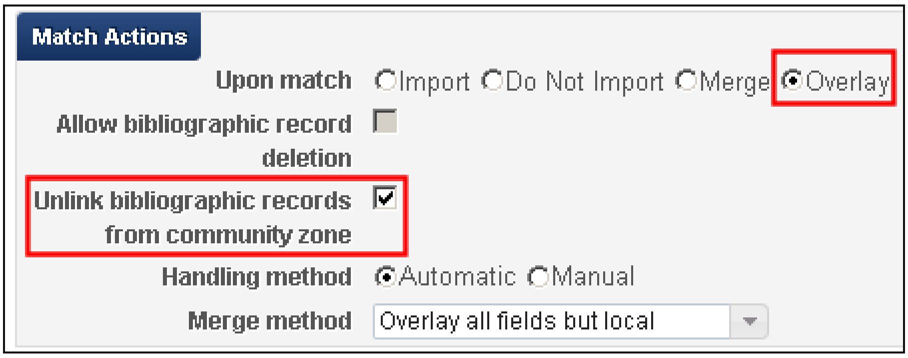


Figure 186: Unlink Bibliographic Records from the Community Zone Import Option

d Select the **Unlink bibliographic records from community zone** option.

e Click **Save**.

Refer to **Unlink bibliographic records from Community Zone** on page **526** in the **Import Profile Details Wizard - Page 4 Fields** on page **525** table for additional information regarding the **Unlink Records from the Community Zone** option and importing.

Managing Electronic Resources

Alma allows you to create and maintain electronic collections and standalone portfolios using various editors and processes. For details on how to manage your electronic inventory, see the following sections:

- **Adding Group Settings to Electronic Resources** on page **280**
- **Managing Electronic Collections** on page **287**
- **Managing Local Portfolios** on page **327**
- **Activating Electronic Resources** on page **392**
- **Managing Patrons' Access to E-Resources Using Alma Resolver** on page **410**
- **Using the Alma Resolver Electronic Services Page** on page **418**
- **Using the Alma Resolver Debugger Tool** on page **420**

VIDEO:

For an introduction to Electronic Resources, see the *Electronic Resource Fundamentals* video. Note that you need to download an ARF player to view this video.

Adding Group Settings to Electronic Resources

PERMISSIONS:

To add group settings to electronic resources, you must have the following role:

- Electronic Inventory Operator

Within a multicampus environment or collaborative network, access to electronic resources is sometimes restricted to certain campuses, libraries, or members (institutions).

To manage the availability of electronic resources for groups, you need to:

1. Define your management groups (see **Configuring Inventory Available For Management Groups for Multicampus Environments** on page **730** or **Configuring Inventory Available For Management Groups for Collaborative Environments** on page **48** in the *Alma Consortia Guide*).
2. Add group settings (Available For) to your electronic resources (collections, services, and/or portfolios). This section describes how to add group settings to your electronic resources by using the **Add Settings for Group** parameters.

NOTE:

The procedures used for associating Available For groups is the same for the following Alma topologies:
- Multicampus
- Collaborative network
Both topologies use the **Add Settings for Group** parameters described in the procedures in this section.

Group settings utilize a variety of parameters depending on the type of electronic resource (collection, service, or portfolio) you are restricting. Refer to the procedures in this section for more information.

NOTE:

The **Add Settings for Group** parameters that you enter and save override the settings for the resource in the context of the group that is specified.

The parameters that are defined as part of the group setting will be used by the Alma Resolver when calculating and resolving electronic services (refer to **Managing Patrons' Access to E-Resources Using Alma Resolver** on page **410** for additional information).

Staff can view the results of these parameter settings on the Electronic Services page using the **Test access** option (refer to **Managing Electronic Resource Activation** on page **395**).

The procedures in this section describe the steps to use **Add Settings for Group** for the following electronic resources:

- Electronic collections
- Electronic services
- Portfolios

To configure group settings for Available For groups for electronic collections:

1. Complete a repository search for an electronic collection.
2. Click **Edit** (for a specific collection). The Electronic Collection Editor opens for that collection.

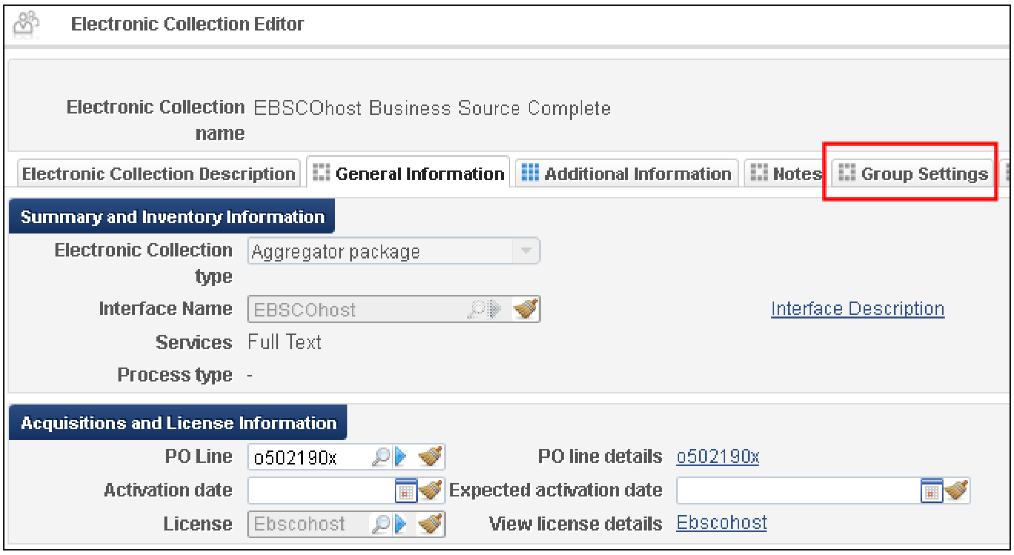


Figure 187: Electronic Collection Editor

3. Select the **Group Settings** tab and click **Add Settings for Group**.

Figure 188: Add Settings for Group Button - Electronic Collections

The Available For Information dialog box opens.

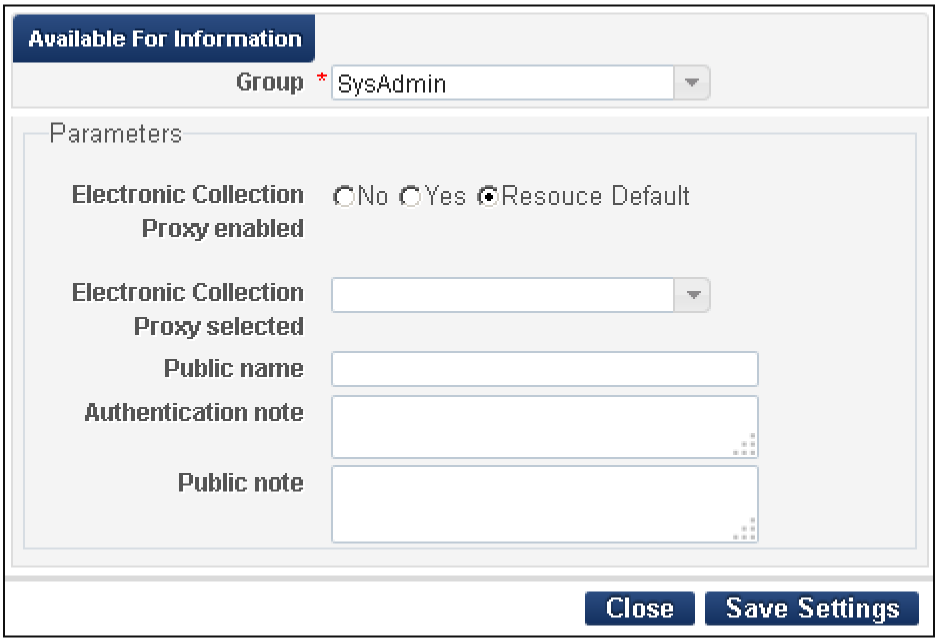


Figure 189: Electronic Collection Available For Information Dialog Box

4 Select a group from the available options in the drop-down list and update the Parameters section to match your requirements

For more information regarding groups and how to configure them, see **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730 or **Configuring Inventory Available For Management Groups for Collaborative Environments** on page 48 in the collaborative network documentation.

5 Click **Save Settings** in the Available for Information dialog box.

6 Click **Save**.

To configure group settings for electronic services:

1 Complete a repository search for an electronic collection.

2 Click **Edit Service** (for a specific collection). The Electronic Service Editor opens for that collection.

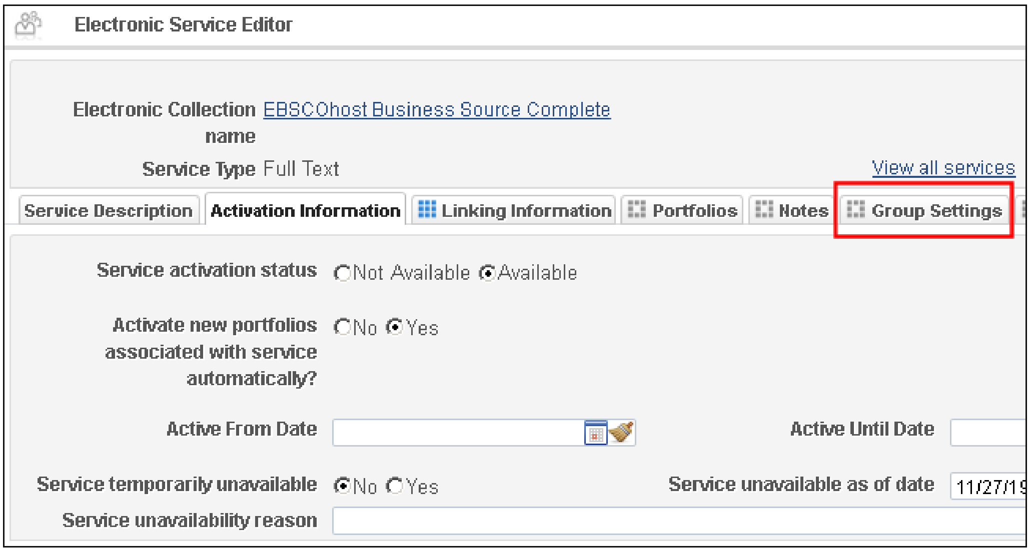


Figure 190: Electronic Service Editor

3 Go to the **Group Settings** tab and click **Add Settings for Group**.

Figure 191: Add Settings for Group Button - Electronic Services

The Available For Information dialog box opens.

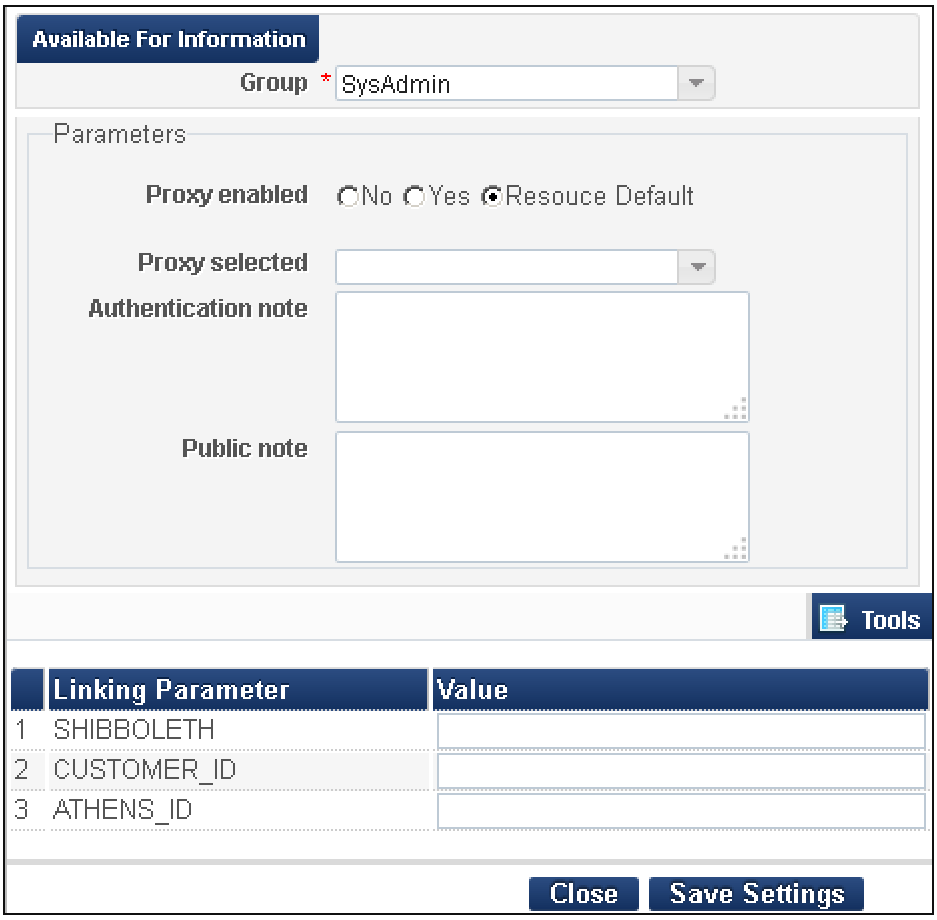


Figure 192: Electronic Service Available For Information Dialog Box

4 Select a group from the available options in the drop-down list (refer to **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730 for more information) and update the Parameters section to match your requirements using the following parameters:

- Proxy enabled (yes, no, or use the resource default)

  Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding proxy relationships among portfolios, electronic collections, and services.

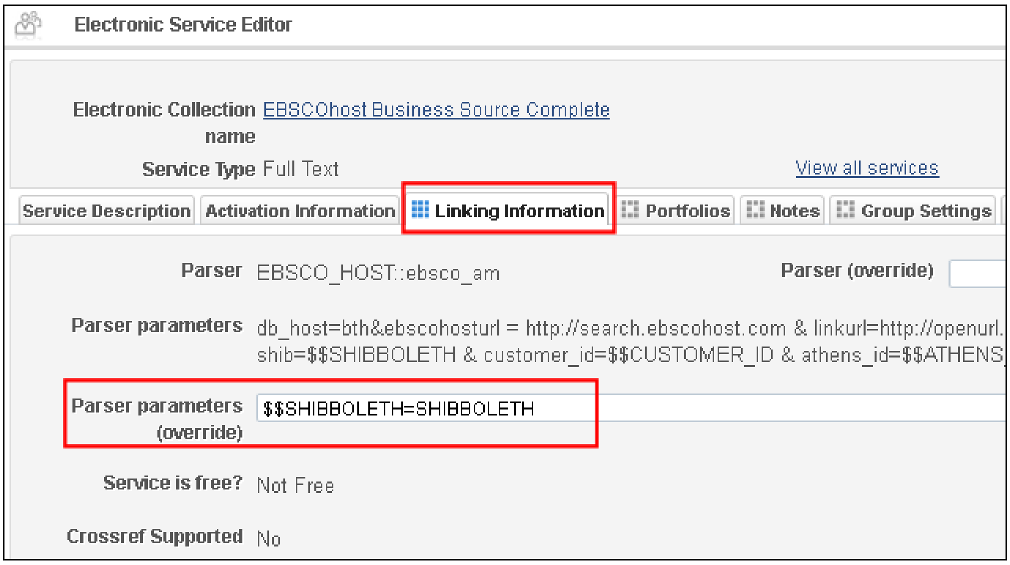
- Proxy selected (select from the available options in the drop-down list)

  Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding how to create a proxy profile.

- Authentication note
- Public note

HINT:

Additionally, you can set linking parameter values in the Linking Information tab on the Electronic Service Editor page. The linking parameters that are set for the group are used to create the appropriate link by the Alma Resolver.



For more information regarding groups and their configuration, see **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730 or **Configuring Inventory Available For Management Groups for Collaborative Environments** on page 48 (if you are part of a collaborative network environment) in the collaborative network documentation.

5 Click **Save Settings**.

6 Click **Save**.

To configure group settings for electronic portfolios:

1 Complete a repository search for an electronic portfolio.

2 Click **Edit** (for a specific portfolio). The Electronic Portfolio Editor opens.

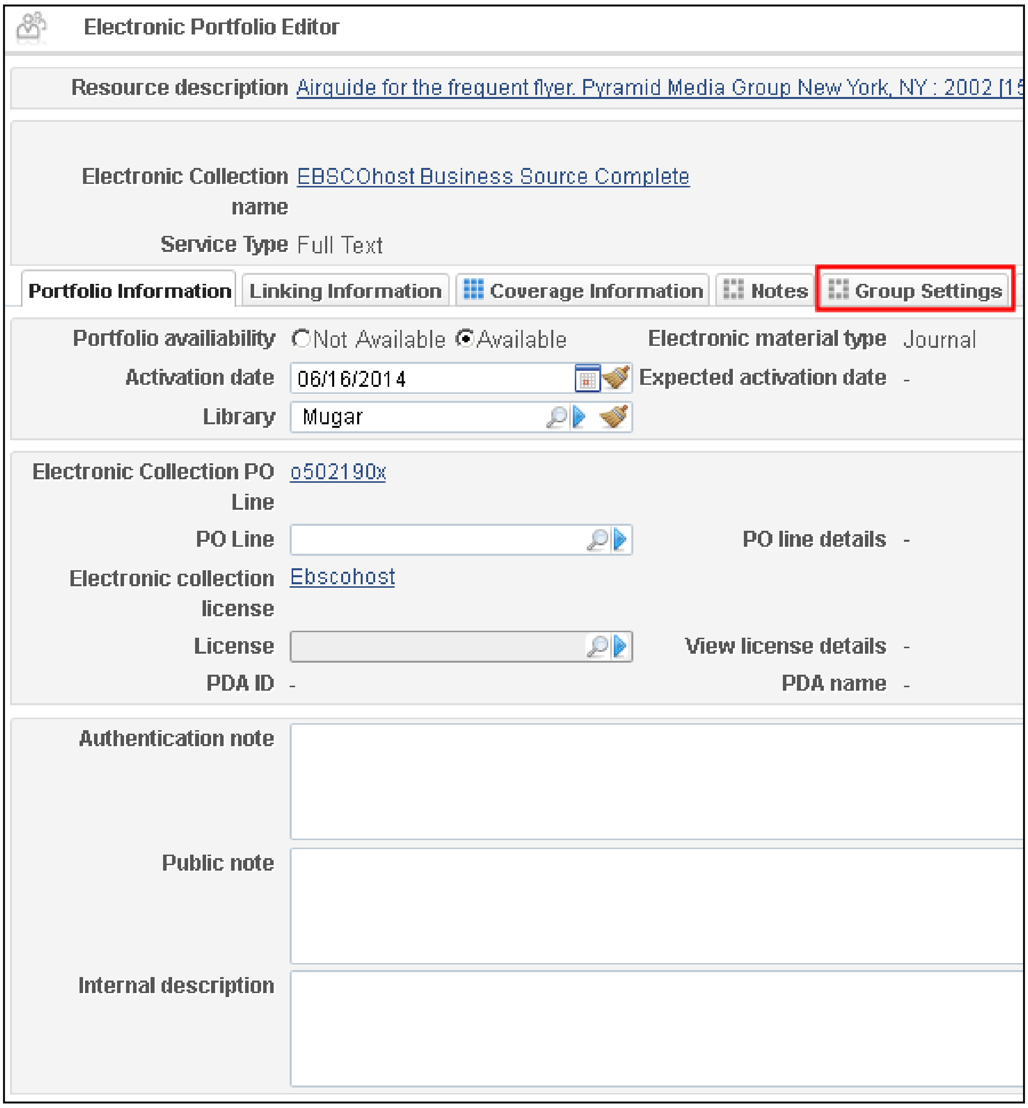


Figure 193: Electronic Portfolio Editor

3 Go to the **Group Settings** tab and click **Add Settings for Group**.

Figure 194: Add Settings for Group Button - Electronic Portfolios

The Available For Information dialog box opens.

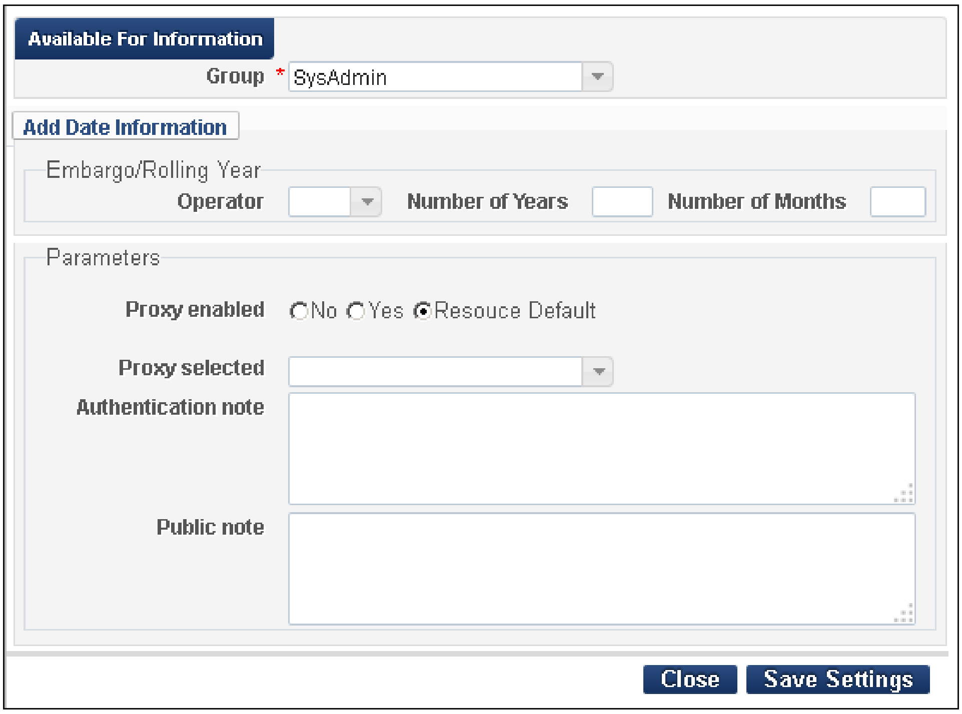


Figure 195: Electronic Portfolio Available For Information Dialog Box

4 Select a group from the available options in the drop-down list and complete the Add Date Information, Embargo/Rolling Year, and Parameters sections to match your requirements using the parameters below.

For more information regarding groups/configuring groups, refer to **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730 or **Configuring Inventory Available For Management Groups for Collaborative Environments** on page 48 (if you are part of a collaborative network environment) in the collaborative network documentation.

5 Click **Save Settings**.

6 Click **Save**.

Managing Electronic Collections

PERMISSIONS:

To manage electronic collections, you must have the following roles:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)

Electronic collections are Alma's method of organizing and preparing electronic resources for delivery and publication. Resources can include electronic journals, portfolios, databases, or e-books, among others, and they can be accessed through a service such as fulltext, or by way of bibliographic records and URLs, or by a combination of these.

NOTE:

Portfolios may be defined as standalone entities or as part of an electronic collection. Alma allows you to enter your portfolio information as a step in the procedure to create an electronic collection or as an independent procedure that simply creates portfolios. The procedure for adding electronic collections and their associated portfolios is provided in the section called **Adding a Local Electronic Collection** on page **288**. The procedure for adding a portfolio independent of adding an electronic collection is provided in the section called **Managing Local Portfolios** on page **327**.

The following sections focus on electronic collections and describe:

- How to add an electronic collection (refer to **Adding a Local Electronic Collection** on page **288**)
- How to modify a service (refer to **Modifying a Service** on page **304**)
- How to work with database type electronic collections (refer to **Working with Electronic Collections of the Database Type** on page **310**)
- How to link a local electronic collection to the CZ (refer to **Linking a Local Electronic Collection to the Community Zone** on page **320**)

Adding a Local Electronic Collection

VIDEO:

For a demonstration on creating an electronic collection, see the *Add an Electronic Collection* video (3:47 mins).

Electronic collections combine both types of resources, packages and databases, into one entity that can contain any combination of portfolios, online databases, services, URLs, and bibliographic records. You can create and activate local electronic collections from Community Zone records or directly from vendor resources. depending on whether your resources exist in the Community Zone or you obtain your resources from a publisher or publisher aggregator or agent.

To add a local electronic collection:

1 On the Electronic Collection Editor page (**Resource Management > Inventory > Add Local Electronic Collection**), enter the basic collection information.

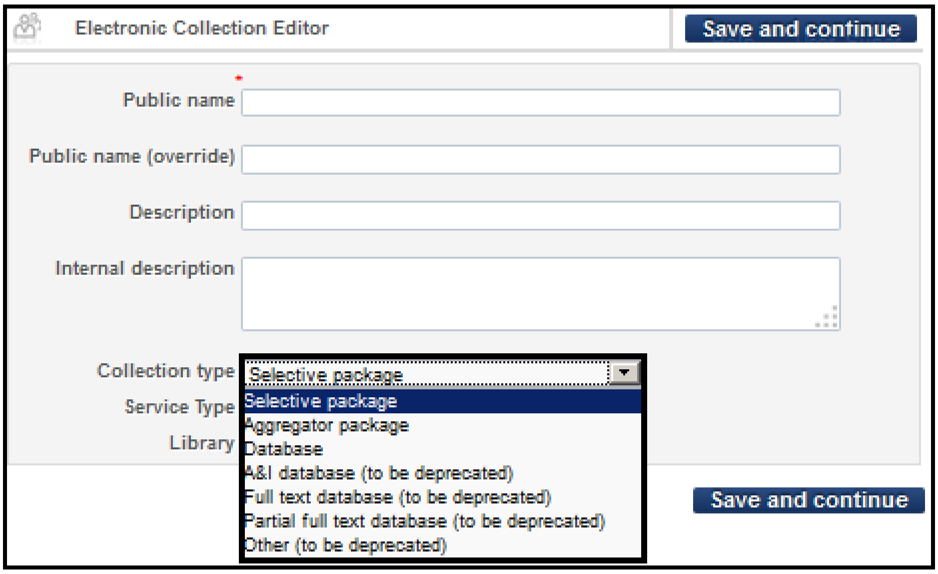


Figure 196: Electronic Collection Editor Page With Transitional Collection Types

Consult the table below for a description of the information to enter.

Table 35. Initial Collection Information

Option	Description
Public name	Enter the name you want to display in the discovery search results. **NOTE:** For local electronic collections, this name can be modified later (after the electronic collection has been saved) from the **Electronic Collection Description** tab using the Electronic Collection Editor.
Public name (override)	Enter the name you want to display in place of the public name for this electronic collection.
Description	Enter the description you want to display in the search results.
Internal description	Enter a description for internal reference only.

Table 35. Initial Collection Information

Option	Description
Collection type	Select one of the following types: ■ Selective Package – Only the portfolios that you select from a package are activated. ■ Aggregator Package – The entire package of portfolios is added to your collection and activated automatically. ■ Database – Your collection begins with an online database record. The remaining database types should be avoided with new collections as they will be deprecated after an initial transitional period.
Service Type	Select one of three drop-down options: full text, selective full text (selections from the full text), or none (the default for database types).
Library	The owning library associated with the electronic collection. Ownership determines the organizational unit that manages the resource. It does not, however, determine or have an effect on who has access to the resource. Library ownership is not required. Electronic resource ownership defaults to the institution level.

2 Click **Save and Continue**.

If you selected a service type of **None**, then the Electronic Collection Editor page opens. If you selected a service type, the Electronic Service Editor page opens to the Activation Information tab.

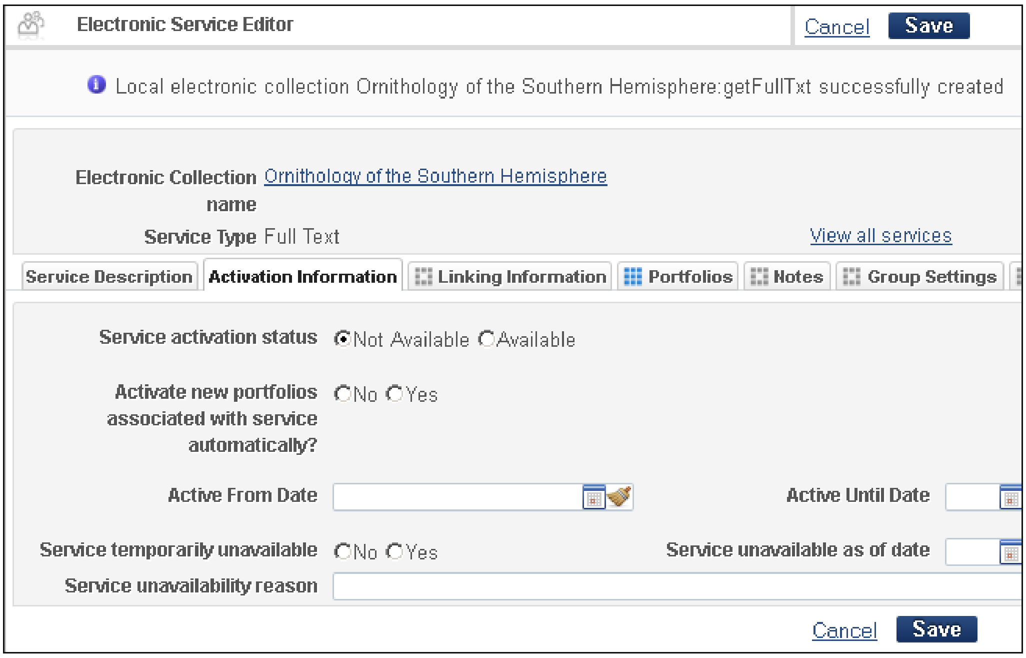


Figure 197: Electronic Service Editor Page, Activation Information Tab

3 Enter the activation information as described in the following table.

Table 36. Activation Information Tab Options

Field	Description
Service activation status	If you want the service to be active, click **Available**. If you want the service to be inactive for now, click **Not Available**.
Activate new portfolios associated with service automatically?	Select **Yes** or **No**. **NOTE:** This option is available for aggregator and selective packages.
Activation from date	Enter a specific activation date. If you do not enter a date, the activation starts from the current date (today).
Active until date	Enter a specific end date. Otherwise, the activation continues indefinitely.
Service temporarily unavailable	Select **Yes** or **No**.
Service unavailable as of date	Enter a specific date for when the service becomes unavailable. Otherwise, it uses the current date (today). **NOTE:** When the service is unavailable, all associated portfolios become unavailable.
Service unavailability reason	Enter the reason text. Use the Alma Resolver to preview on the Electronic Services page what will display in the discovery interface for patrons. See **Figure 198** and **Figure 199**.

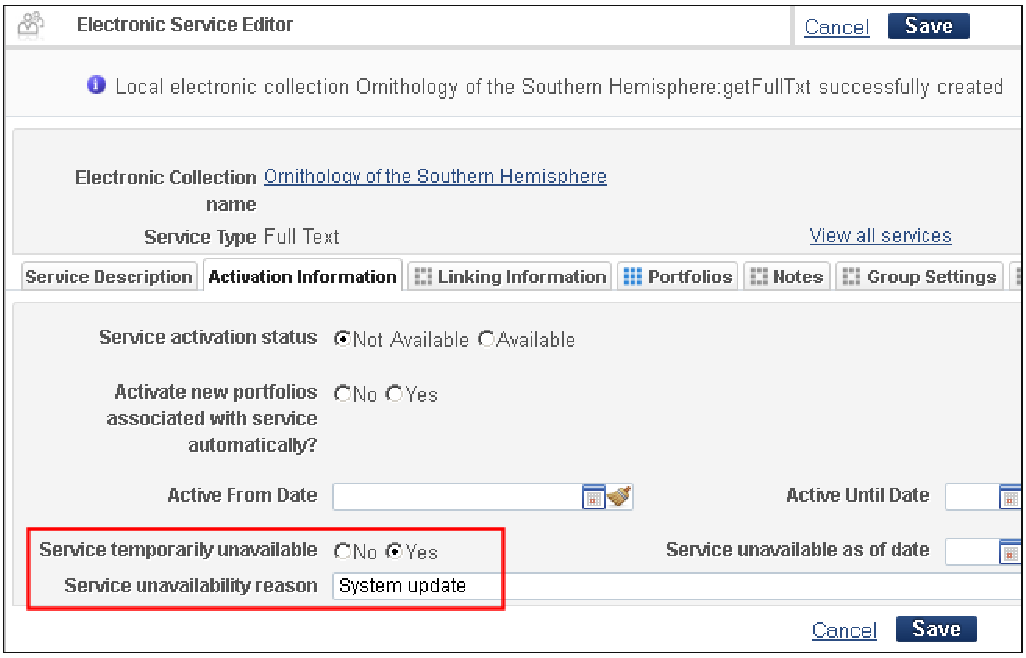


Figure 198: Service Temporarily Unavailable Setting of Yes

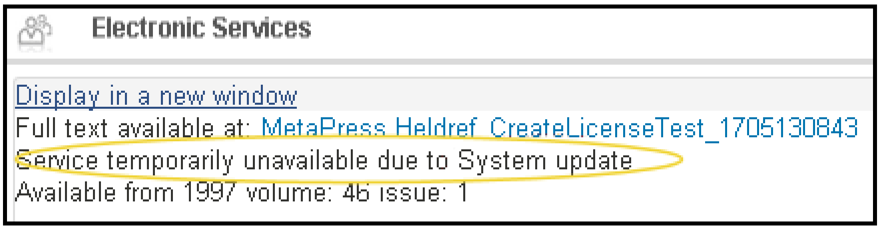


Figure 199: Display of the Service Temporarily Unavailable Message

4 Click the **Linking Information** tab.

The Linking Information tab opens.

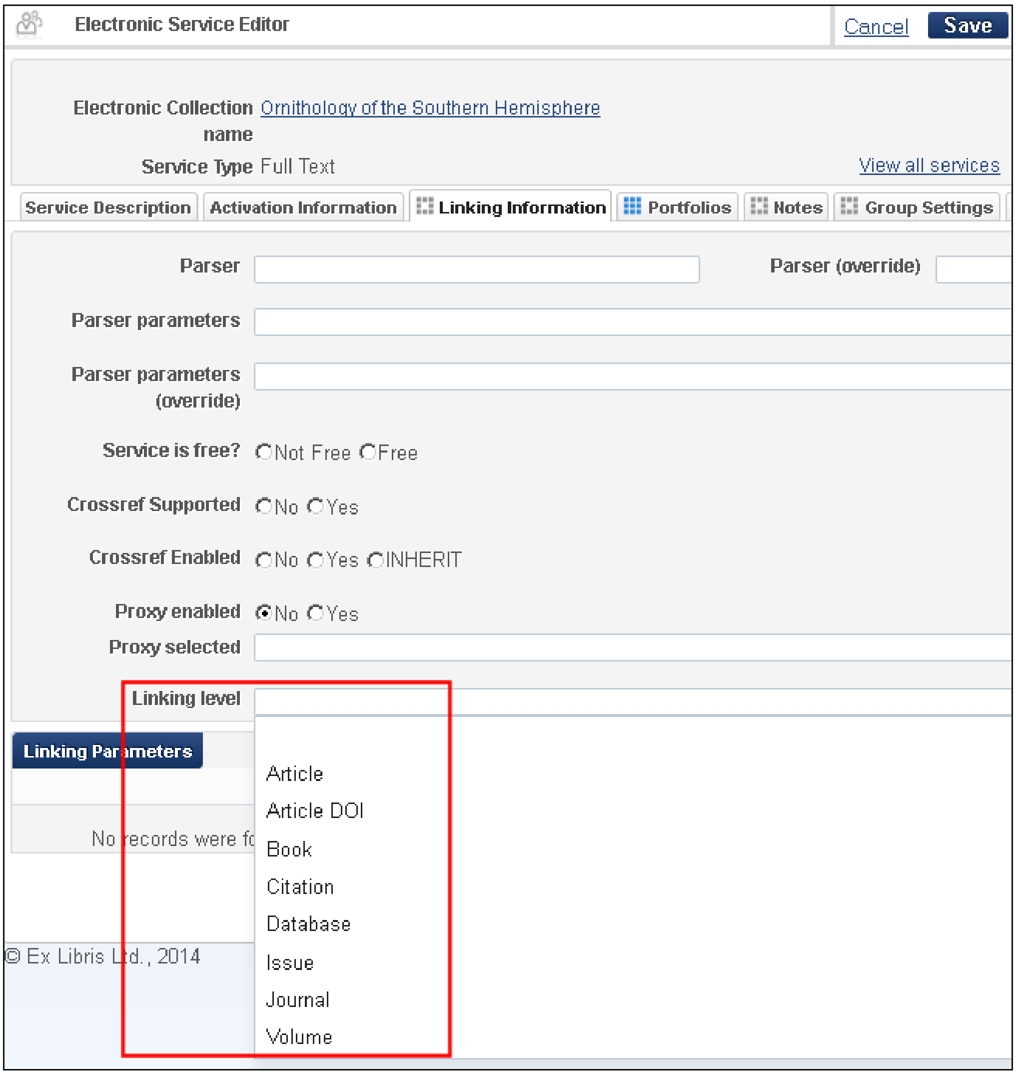


Figure 200: Electronic Service Editor Page, Linking Information Tab

5 Enter information related to linking. Use the following table for descriptions of the fields.

Table 37. Linking Information Tab Options

Option	Description
Parser	Enter the destination service. (Example: AIP:SCITATION)
Parser (override)	Enter an override to the parser, if needed.
Parser parameters	Enter the linking/access information for the service. (Example: url1=http://link.aip.org/link/? & url2=http://publish.aps.org/ & url3=http://link.aps.org/abstract/ & agg=sfx)
Parser parameters (override)	Enter an override to the parser parameter if an alternative one is specified by the service.
Service is free?	Specify if the service is free.
Crossref supported	Specify if cross reference access is supported (**Yes**/**No**).
Crossref enabled	Specify if a cross reference capability is enabled (**Yes**/**No**/**Inherit**).
Proxy enabled	Specify if a proxy has been enabled (**Yes**/**No**). Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding proxy relationships among portfolios, electronic collections, and services.
Proxy selected	Select a proxy profile option from the drop-down list. When you specify **Yes** for **Proxy enabled**, you need to identify which proxy profile is to be used for authentication (of users outside the library's network) to access the online database you have created. Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding how to create a proxy profile.
Linking level	Specify the linking level or unit to which the electronic collection will link.
Linking Parameters	If needed, specify the values for the parameters configured in the parser parameter fields above. See the table below for more information. **NOTE:** For the $$U_SHIBBOLETH parameter, the relevant entity ID must be specified. In addition, the value **Yes** must be entered for $$SHIBBOLETH.

Some electronic collections within Alma require parameters that are specific to your library. For SFX customers, this information is migrated from SFX. For non-SFX customers, you must enter the values for the electronic collections to which you subscribe. See the following table for a description of which parameters require information for which electronic collections.

NOTE:

This table is not exhaustive. Additional electronic collections that are not listed in this table may require information for their parameters. For more information, refer to the *SFX Target and Alma E-Collection Configuration Guide* in the Documentation Center. (Note that you must be logged in to the Documentation Center in order to view this guide.)

Table 38. Library-Specific Parameters

Collection	Parameters	Explanation
ABC CLIO Databases	USERNAME PASSWORD	An ABC representative can provide you with your user name and password.

Table 38. Library-Specific Parameters

Collection	Parameters	Explanation
CCC (Copyright Clearance Center) service	BILL, ID, INST, MAIL, and SOURCE	A CCC representative can provide you with the details for each of the following linking parameters: ■ BILL – The email address used for billing. ■ MAIL – The email address used for sending an article. ■ SOURCE – The university system code, which is provided by CCC. ■ INST – The campus name code (for example, Fullerton), which is provided by CCC. ■ ID – The libraryUserID of EZProxy users, which is provided by CCC. If the university system and the institute are the same, the Get It Now service expects the SOURCE and INST parameters to have the same value. **NOTE:** Testing access to CCC Get It Now services (using the test access action in the staff search results) will not lead the staff user to an article because the electronic resource from which test access is performed is at the journal level.
Ebook Library	LIBID URL_DOMAIN	Library’s code assigned by EBL. No input is required.
Eureka	CUSTOMER_ID	A Eureka representative can provide you with your customer ID.

Table 38. Library-Specific Parameters

Collection	Parameters	Explanation
Factiva	NAMESPACE, PASS, USER Or: SID	A Factiva representative can provide your namespace, user, and password information. Or: Specify your XSID value. **NOTE:** When linking to Factiva with your XSID, there is no need to provide other parameters.
All Gale Databases	LOC_ID ART DATABASE	A Gale representative can provide you with your institution's LOC_ID. No input required for this parameter. The DATABASE parameter is only relevant for the following collections: ■ Galegroup IT Custom Journals ■ Galegroup IT Custom Newspapers ■ Galegroup Military Intelligence ■ Galegroup Religion Philosophy Collection
Journals at Ovid	USERNAME PASSWORD	Libraries can connect to Ovid Journal using IP authentication or logon credentials. If your library uses a user name and password, provide us with these values.
	IPAUTH	If your institution is authenticated by IP authorization, type `yes` in the Value column. In this case, there is no need to provide a user name and password.
CSA Databases	USERNAME	Provide your library's user name and access values.
	ACCESS	

Table 38. Library-Specific Parameters

Collection	Parameters	Explanation
ProQuest Databases	CLIENTID	A Client ID is necessary for users in a consortia environment. In other cases, the Client ID is not necessary for linking to ProQuest databases, but may enable additional services, depending on your institution's license with ProQuest. A ProQuest representative can provide you with your Client ID. **NOTE:** For Chadwyck Literature Online, you must populate the $$SERVER_LOC parameter with a value corresponding to your geographic location. If you are accessing this service from Europe, the parameter value should be **UK** and not EUR.
Westlaw	SPONSORCODE	A Westlaw representative can provide you with your customer code.

6 Click the **Portfolios** tab. The Electronic Service Editor page opens to the Portfolios tab.

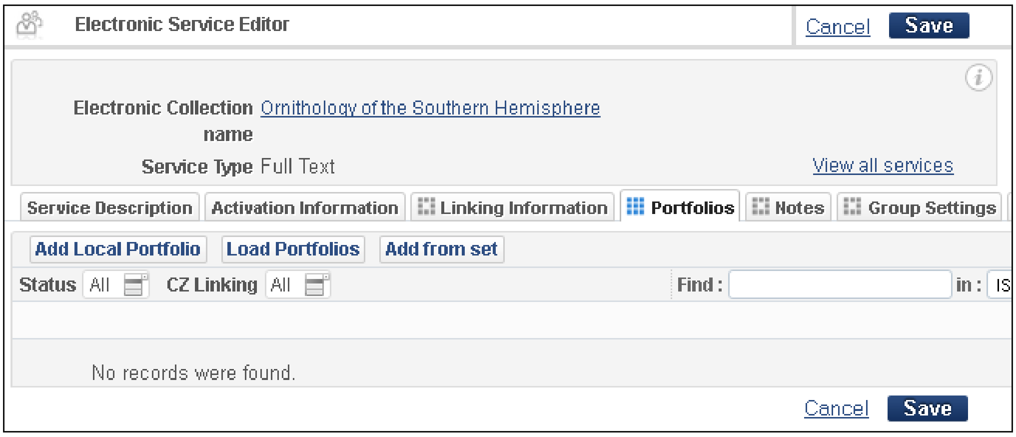


Figure 201: Electronic Service Editor Page, Portfolios Tab

From the Portfolios tab, you can:

- Add single portfolios (step 7)

- Load multiple portfolios from an Excel spreadsheet using batch processing (see **Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)** on page 339)
- Add portfolios from an existing set (click **Add from set** to open available sets, then select one)

7 To add a single local portfolio, click **Add Local Portfolio**.

The New Portfolio page opens.

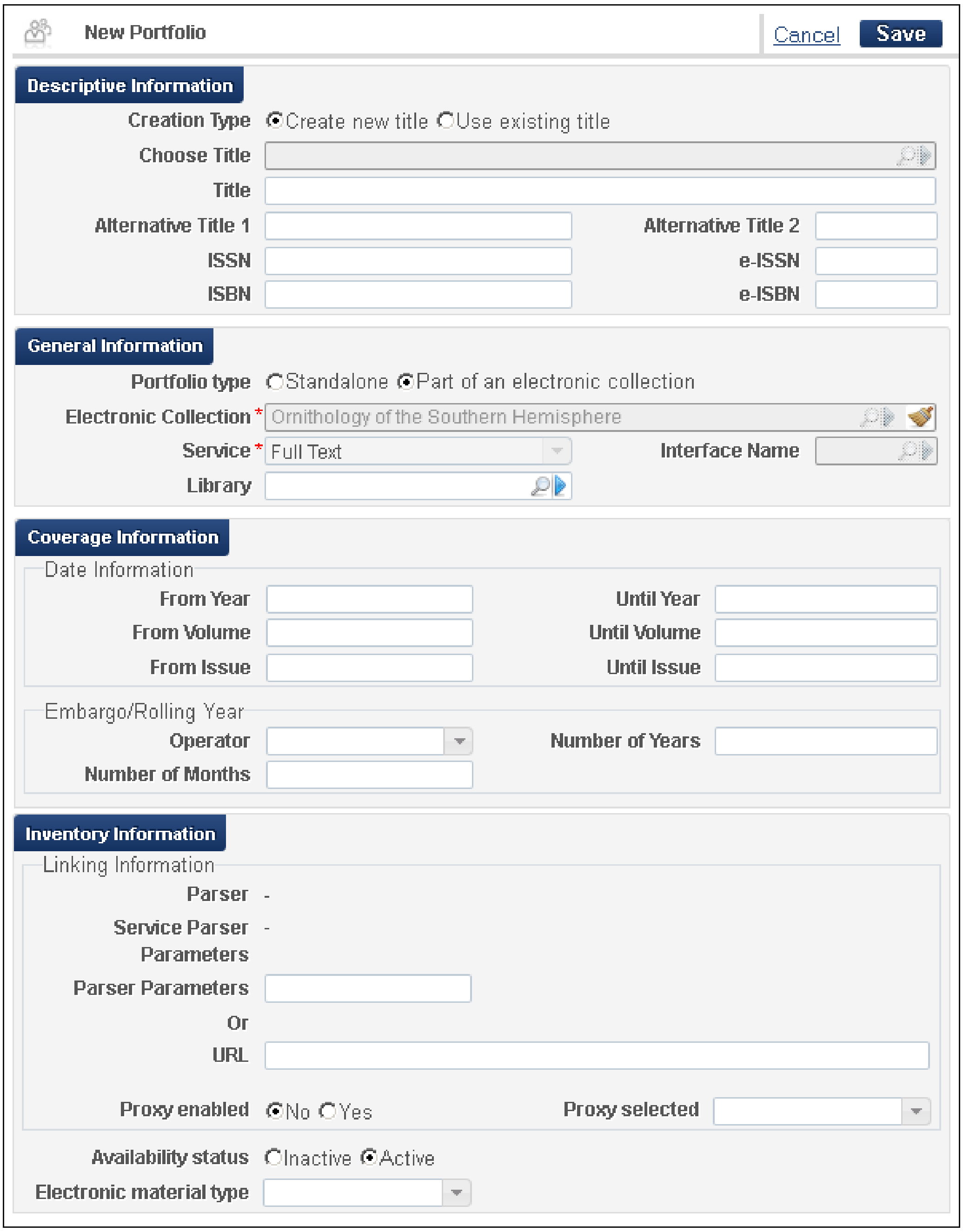


Figure 202: New Portfolio Page (Part 1 of 2)

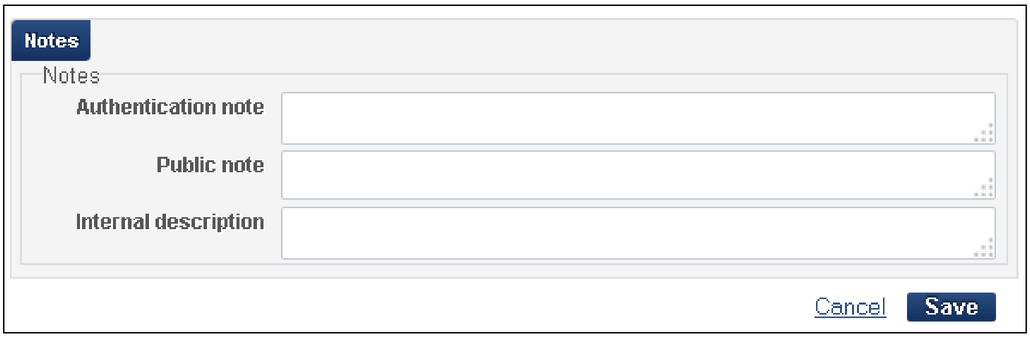


Figure 203: New Portfolio Page (Part 2 of 2)

This enables you to add a single portfolio and associate it with the collection as part of the collection creation process, or you can skip this step and add the portfolio information later by doing one of the following:

- Editing the electronic collection and adding the portfolio information
- Adding local portfolios using the **Add Local Portfolio** option accessed from **Resource Management > Create Inventory > Add Local Portfolio** (see **Adding a Portfolio to an Electronic Collection** on page **333**)

If you choose to add a single portfolio in this step, use **Table 42** on page **329** for a description of the fields on the New Portfolio page.

NOTE:

For additional information on adding local portfolios to local electronic collections, see *How to Add Local Portfolios to Local Packages*. (*Packages* are now considered electronic *collections*.) Note that you must be logged in to the Documentation Center in order to view this document.

8 When you have completed the information on the New Portfolio page, or finished loading portfolios or a set, click **Save** or **Submit** and click through any confirmation boxes.

Alma saves the portfolio(s) and refreshes the Portfolios tab of the Electronic Service Editor page with options for activating the portfolio.

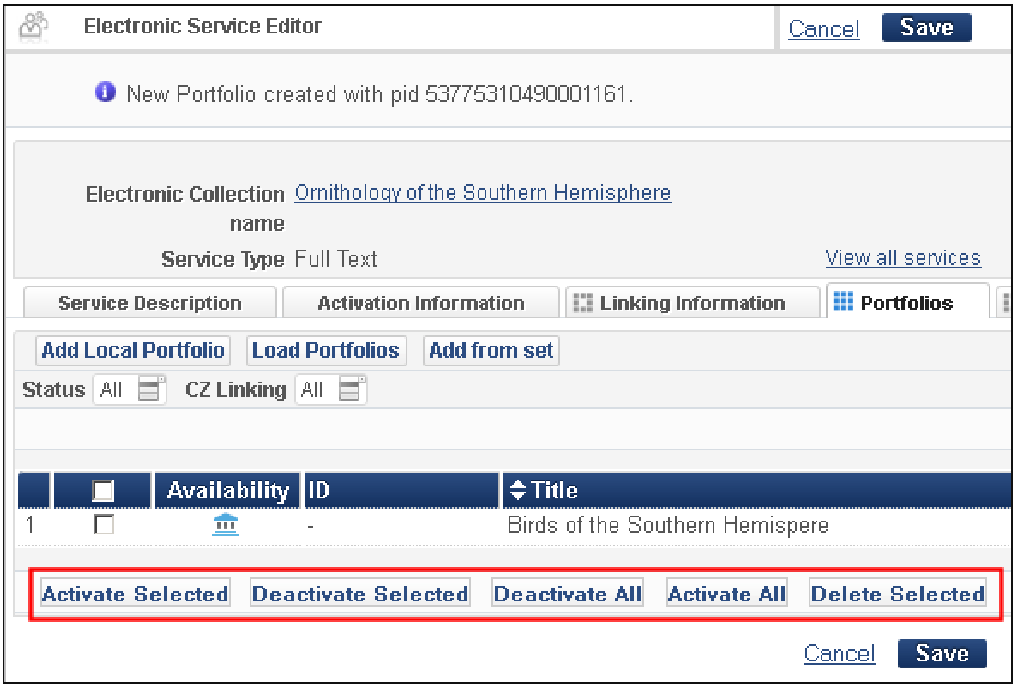


Figure 204: New Portfolio Activation Options

9 To activate or deactivate one or more portfolios, select the check box(es) of the portfolio(s) you want to activate or deactivate and click the activation action you want. (Alternately, for just one portfolio, you can select the **Actions** button in the portfolio's row and make your selection there.)

10 Additionally to enter a note for the collection, click the **Notes** tab, type your note in the Quick Add box, and click **Add**. Repeat the Quick Add process for all your notes.

Authentication notes and public notes are both displayed in the discovery system. Authentication notes are specifically authentication-related.

For collaborative network and multicampus institutions, if you want to designate group access settings for the resource(s), click the **Group Settings** tab and enter the necessary information. For a description of group settings for electronic collections, services, and portfolios, refer to **Adding Group Settings to Electronic Resources** on page 280.

11 Click **Save** to save all the entries and changes on the Electronic Service Editor page and return to the Electronic Collection Editor page.

Alma returns you to the Additional Information tab of the Electronic Collection Editor page.

Modifying a Service

During the addition of a service, the system uses a wizard to obtain relevant information. You can use the Electronic Service Editor page to update this information on tabs that correspond to the steps of the wizard.

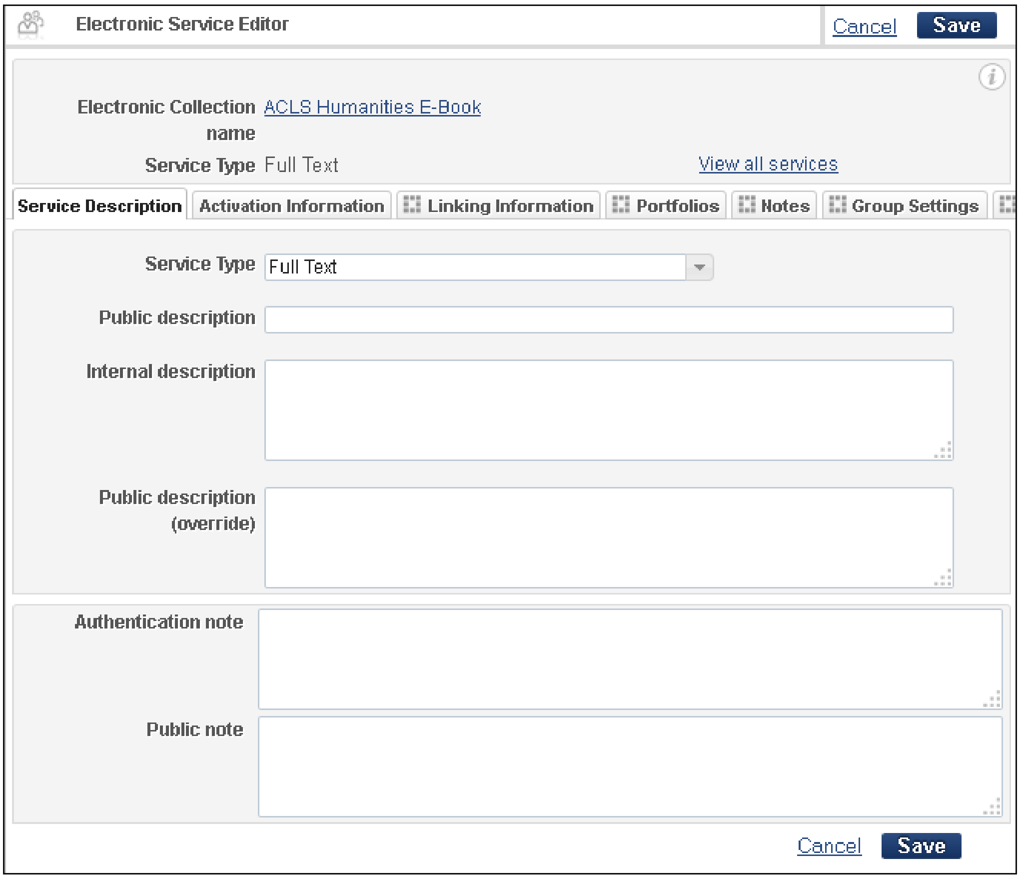


Figure 205: Electronic Service Editor - Service Description Tab

To modify a service:

1 Search for the electronic collection that you want to update. For more information, see **Using the Alma Repository Search** on page **18**.

The brief results display for the electronic collection.

2 Click **Edit Service**.

The Electronic Service Editor page opens.

3 Update the fields on each tab as needed. Refer to the following table for more information.

Table 39. Electronic Service Editor Page

Field	Description
Electronic Collection name	Displays the title of the electronic collection that contains the portfolio.
Service Type	Displays the type of service for the electronic collection., full text or select full text.
Service Description tab:	
Public description	Displays the description given to end users.
Internal description	Displays an additional description given to staff users.
Public description (override)	Allows you to override the public description.
Authentication note	Provides a field for you to enter any note related to authentication (to be displayed in the discovery system).
Public note	Allows you to share information about the service with patrons. (The note is displayed in the discovery system.)
Activation Information tab:	
Service activation status	Allows you to activate or deactivate a service immediately. The valid choices are **Not Available** or **Available**.
Activate new portfolios associated with service automatically	Displays whether new portfolios are automatically activated when they are added to this service. The option to automatically activate new portfolios associated with a service is available for selective electronic collections in addition to aggregator electronic collections. (This option can be configured from both the Activation Wizard for new services and in the Electronic Services Editor for existing services.)
Active from date	Allows you to specify an activation range start date.
Active until date	Allows you to specify an activation range end date.
Service temporarily unavailable	Allows you to temporarily deactivate a service immediately. The valid choices are **No** or **Yes**.
Service unavailable as of date	Allows you to deactivate a service starting on a specific date.
Service unavailability reason	Allows you to specify an unavailability reason.

Table 39. Electronic Service Editor Page

Field	Description
Linking Information tab:	
Parser	Displays the destination service specified for the electronic collection.
Parser (override)	Allows you to override the parser information shown in the Parser field.
Service parser parameters	Displays the linking/access information for the service.
Parser parameters	Displays the linking/access information for this service.
Parser Parameters (override)	Enter either the parser parameters or the URL for accessing the portfolio. Example: url1=http://link.aip.org/link/? & url2=http://publish.aps.org/ & url3=http://link.aps.org/abstract/ & agg=sfx For information on library-specific parameters, see **Table 38** on page **296**.
URL	Displays the URL for accessing the service.
URL (override)	Enter either the Parser parameters field or the URL field for accessing the portfolio. The URL overrides the URL created based on the parameters taken from the electronic collection and service. Example: http://link.aip.org/link/?
Service is free?	Indicates whether the service is free. If a subscription is needed, the system displays **Not Free**.
Crossref Supported	Indicates whether cross references are enabled for the electronic collection.
Crossref Enabled	Allows you to specify the cross-reference options for this service: ■ No – cross references are not enabled. ■ Yes – cross references are enabled. ■ INHERIT – cross reference options are inherited from the electronic collection.
Proxy enabled	Specify whether a proxy has been enabled (**Yes**/**No**). Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding proxy relationships among portfolios, electronic collections, and services

Table 39. Electronic Service Editor Page

Field	Description
Proxy selected	Select a proxy profile option from the drop-down list. If you specified **Yes** for **Proxy enabled**, you need to identify which proxy profile is to be used for authentication (of users outside the library's network) to access the online database you have created. Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information on how to create a proxy profile.
Linking level	Displays the linking level for the service (such as Book, Journal, Article, or Volume).
Portfolios tab:	
Add Local Portfolio	Allows you to add a local portfolio to the service. For more information, see **Adding a Portfolio to an Electronic Collection** on page 333.
Add Portfolios from Community	Displays the Portfolios List page from which you can select portfolios to be added.
Add All Portfolios from Community	Activates all the portfolios from the Portfolios List page.
Load Portfolios	Opens a file upload wizard by which you can select an Excel-formatted file to load multiple portfolios. For more information, see **Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)** on page 339
Link Local Portfolios to Community	Provides the option to link locally created portfolios to the CZ.

Table 39. Electronic Service Editor Page

Field	Description

Actions	Allows you to select the following operations per portfolio:
	■ **Edit** – Opens the Electronic Portfolio Editor in edit mode. For more information, see **Modifying a Portfolio Using the Electronic Portfolio Editor** on page **349**.
	■ Delete – Displays the Delete Confirmation dialog box and provides the following options for how to handle childless bibliographic records when deleting the portfolio:
	  ■ Delete bibliographic record
	  ■ Do nothing
	  ■ Suppress bibliographic record
	■ **View** – Opens the Electronic Portfolio Editor in view-only mode.
	■ **Test Access** – Displays the associated portfolio on the Electronic Services page.
	■ **Deactivate** – Deactivates the associated portfolio.

Activate Selected	Allows you to activate portfolios that you have selected in the list.
Deactivate Selected	Allows you to deactivate portfolios that you have selected in the list.
Deactivate All	Allows you to deactivate all portfolios in the list
Activate All	Allows you to activate all portfolios in the list
Delete Selected	Allows you to delete selected portfolios from the list. This action displays the Delete Confirmation alert box and provides the following options for how to handle childless bibliographic records: ■ Delete bibliographic record ■ Do nothing ■ Suppress bibliographic record

Table 39. Electronic Service Editor Page

Field	Description
Tools	■ Extended Export – exports the list of portfolios with extended information to Excel ■ Excel (Current View) – exports only the fields displayed in the list of portfolios to Excel Exporting can include inactive (Not Available) portfolios. Diacritics in titles can be exported (and imported).
Notes tab:	
Note	Use this option to enter a staff note regarding the portfolio.
Group Settings tab (for collaborative network environments):	
Add Group Info	Allows you to define: **Group** – Select the group name from the drop-down list. **Date Information** – See the Date Information (override) section above for details. **Embargo/Rolling Year** – See the Embargo/Rolling Year (override) section above for details.

Table 39. Electronic Service Editor Page

Field	Description
History tab:	
	The History tab displays a list of changes related to the electronic service. For each change that is saved, the following information is shown on the History tab: ■ Dates of the change ■ Operator that made the change ■ Name of the field that was changed ■ Old (previous) value ■ New value For fields/columns that are blank or empty, a dash displays in the History tab columns. You can use the **Find** function to locate a specific change by searching for a specific **Field name** or **Operator** name. Click the icon next to the ID in the **Operator** column to view the following details about the operator in the pop-up window that opens: ■ Name ■ Primary identifier ■ Home address ■ Office address ■ Email ■ Telephone **VIDEO:** For more information about the History tab, refer to the *History Tab for Electronic Resources* video (4:26 mins).

4 Click **Save** to save your changes to the service.

Working with Electronic Collections of the Database Type

Electronic collections that rely primarily on an online database are set up somewhat differently from the primarily service-based package types.

Incorporating online databases in your inventory involves adding the online database records to your inventory, performing inventory-related tasks, and activating the online databases for patron discovery.

To add a local database to the inventory:

1 Click **Add Local Electronic Collection** from **Resource Management > Create Inventory**. The Electronic Collection Editor page opens.

2 Enter the initial database information. Refer to the following table for a description of the information to be entered.

Table 40. Initial Database Information

Option	Description
Public name	Enter the name that is to display in the discovery search results.
Public name (override)	Enter a name that you want to display (in the discovery search results) as an override to the name identified in **Public name**.
Description	Enter the description that is to display in the search results.
Internal description	Enter a description for internal reference only.
Collection type	Select **Database** (refer to the illustration below).
Library	Click the **Find** icon and select a library from the list to identify the library associated with the database.

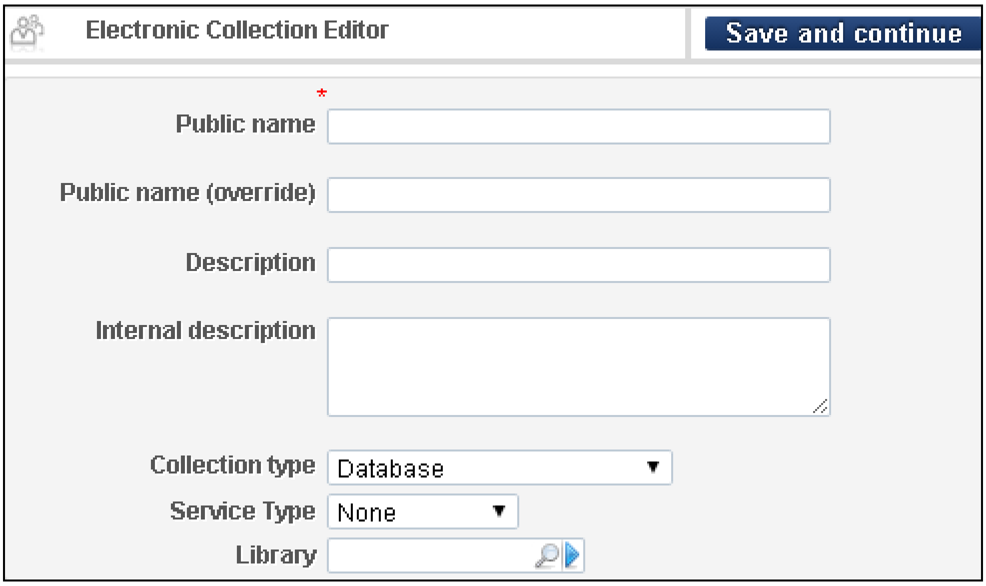


Figure 206: Electronic Collection Editor - Database Collection Type

3 Click **Save and Continue**. The Electronic Collection Editor opens to the General Information tab (see **Figure 207**).

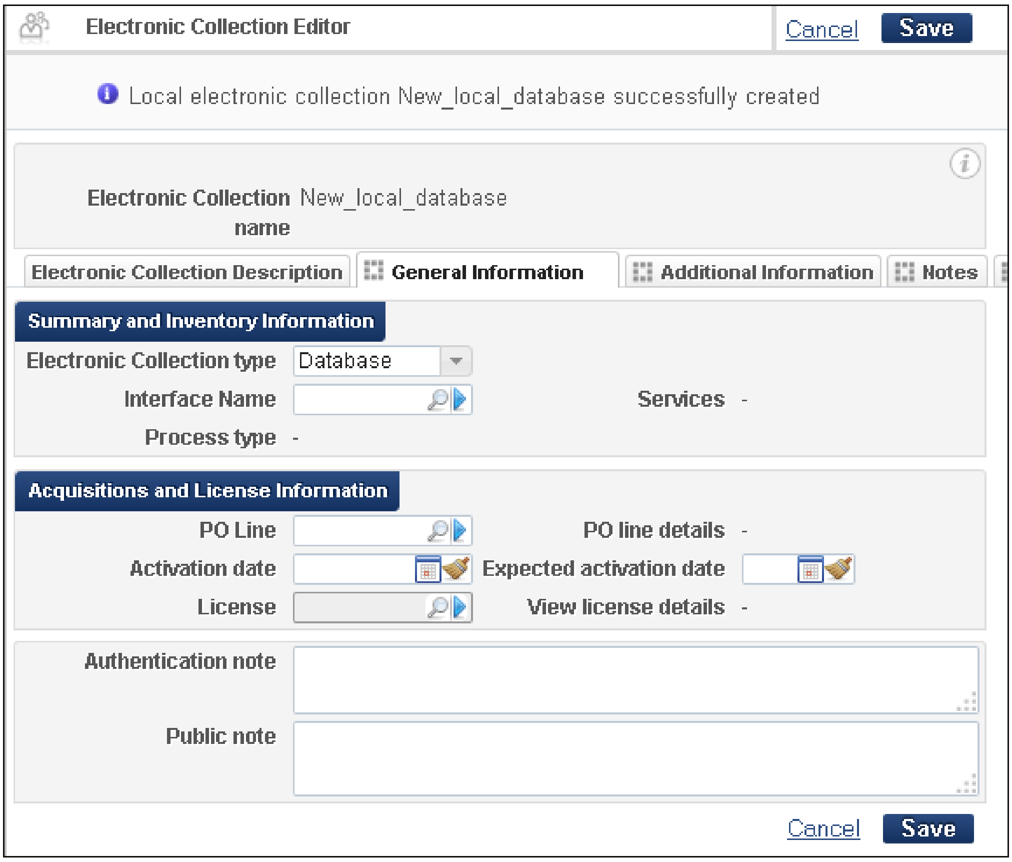


Figure 207: Add Local Electronic Collection for a Database

4 Enter the information on the tabs as needed for the database that you are adding to the inventory. Refer to **Table 41** for information about the fields.

Table 41. Electronic Collection Editor Tabs and Fields

Option	Description
Electronic Collection Description tab:	
Public name	Displays the name that you previously entered.
Public name (override)	Displays the public name override that you entered or allows you to add this information for the first time or edit the information you previously entered. This name also displays above the tabs.

Table 41. Electronic Collection Editor Tabs and Fields

Option	Description
Description	Displays the description that you previously entered or allows you to enter a description if one was not initially entered.
Internal description	Displays the initial description that you may have entered and allows to edit that information or add it for the first time.
Library	Displays the library you initially selected to associate with the database and allows you to search for and select a different library from the list.
General Information tab:	
Electronic collection type	Displays the collection type that you previously entered. This can be edited if you decide to follow a more service-oriented ordering model.
Interface name	Select the vendor for this database. A link to the interface description is provided when an interface name has been entered.
Services	This information displays if it is available.
Process type	This information displays if it is available.
Access rights	Displays the list of access rights; select the relevant one for this database.
Created by	Displays the user ID of the operator that created the database inventory record and the date that the record was created.
Updated by	Displays the user ID of the operator that updated the database inventory record and the date that the record was modified.
PO line	Use this option to identify the PO line created for the database being added. **NOTE:** When adding a database, you may skip this option and process the order information later after saving the database inventory record.
PO line details	Provides the PO line details, if available.
Activation date	Enter the activation date.
Expected activation date	Enter the expected activation date.

Table 41. Electronic Collection Editor Tabs and Fields

Option	Description
Active license	Click the search icon to display the list of licenses and amendments. Select the vendor license for the database that you are adding.
View license details	Displays a link to the license details when an active license is selected.
Authentication note	Specify any note related to authentication (to be displayed in the discovery system).
Public note	Use this note option to share information about the database with patrons. (This note is displayed in the discovery system.)
Additional Information tab:	
Source	This is a placeholder for future development for external resources.
Source ID	This is a placeholder for future development for external IDs.
Creator	This is a placeholder for future development for external resources.
Alternative title	This is a placeholder for future development for external resources enabling an alternative title (to the external resource) to be specified.
URL	Enter the URL for the database.
Database is free?	Specify if the database is free.
Proxy enabled	Select **Yes** or **No**.
Proxy selected	Select a proxy profile option from the drop-down list. When you specify **Yes** for **Proxy enabled**, you need to identify which proxy profile is to be used for authentication (of users outside the library's network) to access the online database you have created. Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding how to create a proxy profile.
Language	Specify the language of the database from the drop-down list.
Category	Specify the subject that the online database handles.

Table 41. Electronic Collection Editor Tabs and Fields

Option	Description
Additional descriptive information	Click the **Find** icon to display the Repository Search page and search for the MARC bibliographic record to link with the database that you are adding. **IMPORTANT:** The MARC bibliographic record selected for this option displays in the discovery (Primo) search results. This is the MARC bibliographic record that the library's cataloger has created specifically for the database being added.
Notes tab:	
Note	Enter a note and click **Add**. Click **Clear** to remove all text that you have entered. Use this option to enter multiple notes that can be referenced by staff. Row actions allow you to edit and delete notes.
Group Settings tab (for collaborative network/multicampus environments):	

Add Settings for Group	Allows you to define the following Available For details:
	■ Group (select the group name from the drop-down list)
	■ Parameters:
	  ■ Electronic collection proxy enabled (Yes, No, or Resource Default)
	  ■ Electronic collection proxy selected (select from the drop-down list of preset proxies)
	  ■ Public name
	  ■ Authentication note
	  ■ Public note

Table 41. Electronic Collection Editor Tabs and Fields

Option	Description
History tab:	
	The History tab displays a list of changes related to the electronic service. For each change that is saved, the following information is shown on the History tab: ■ Dates of the change ■ Operator that made the change ■ Name of the field that was changed ■ Old (previous) value ■ New value For fields/columns that are blank or empty, a dash displays in the History tab columns. You can use the **Find** function to locate a specific change by searching for a specific **Field name** or **Operator** name. Click the icon next to the ID in the **Operator** column to view the following details about the operator in the pop-up window that opens: ■ Name ■ Primary identifier ■ Home address ■ Office address ■ Email ■ Telephone **VIDEO:** For more information about the History tab, refer to the *History Tab for Electronic Resources* video (4:26 mins).

5 After completing the information on the tabs, click **Save**. The Repository Search page opens displaying the database record that you have added (refer to the figure below). With this record, you can process other tasks related to the online database such as placing an order.

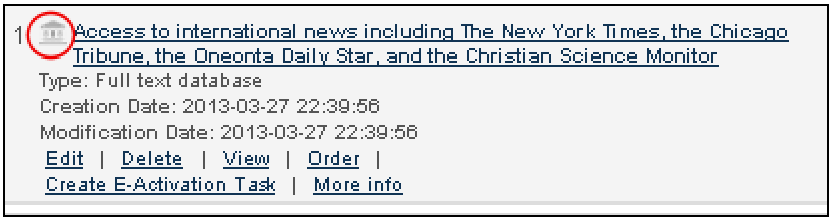


Figure 208: Local Electronic Collection Record Added

NOTE:
The institution icon displays in grey (not color) since the database resource has not yet been activated and made available to patrons.

To place an order:

1 Click the **Order** link.

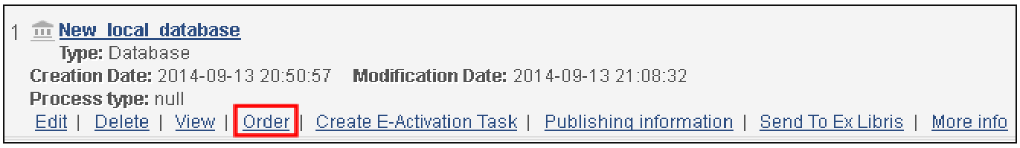


Figure 209: Order Link

The PO Line Owner and Type page opens.

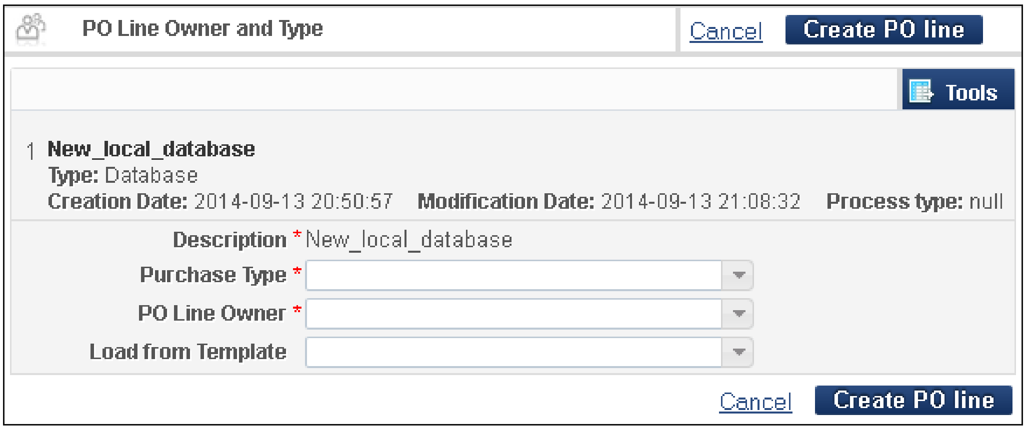


Figure 210: PO Line Owner and Type

2 Enter the Purchase Type and PO Line Owner and click **Create PO Line**.

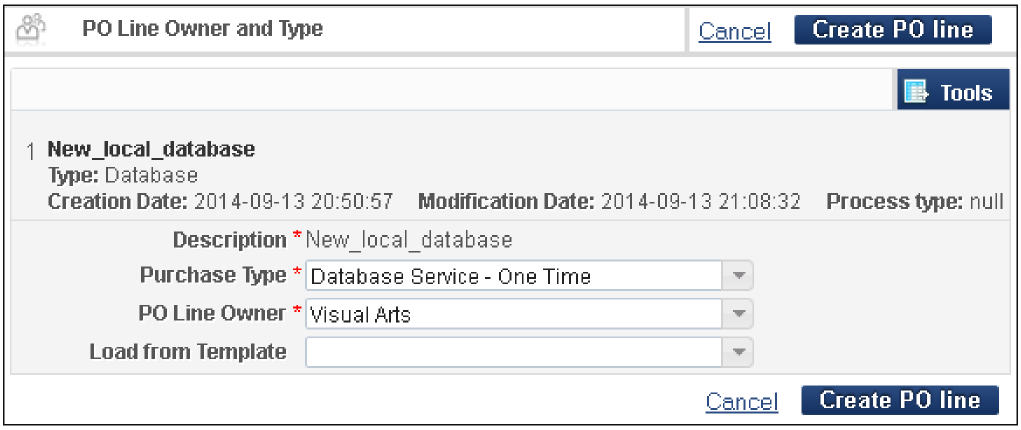


Figure 211: PO Line Owner and Type Entered

3 Enter the PO line information for the online database. (Refer to **Manually Creating a PO Line** in the *Alma Acquisitions Guide* for additional information regarding entering PO lines.)

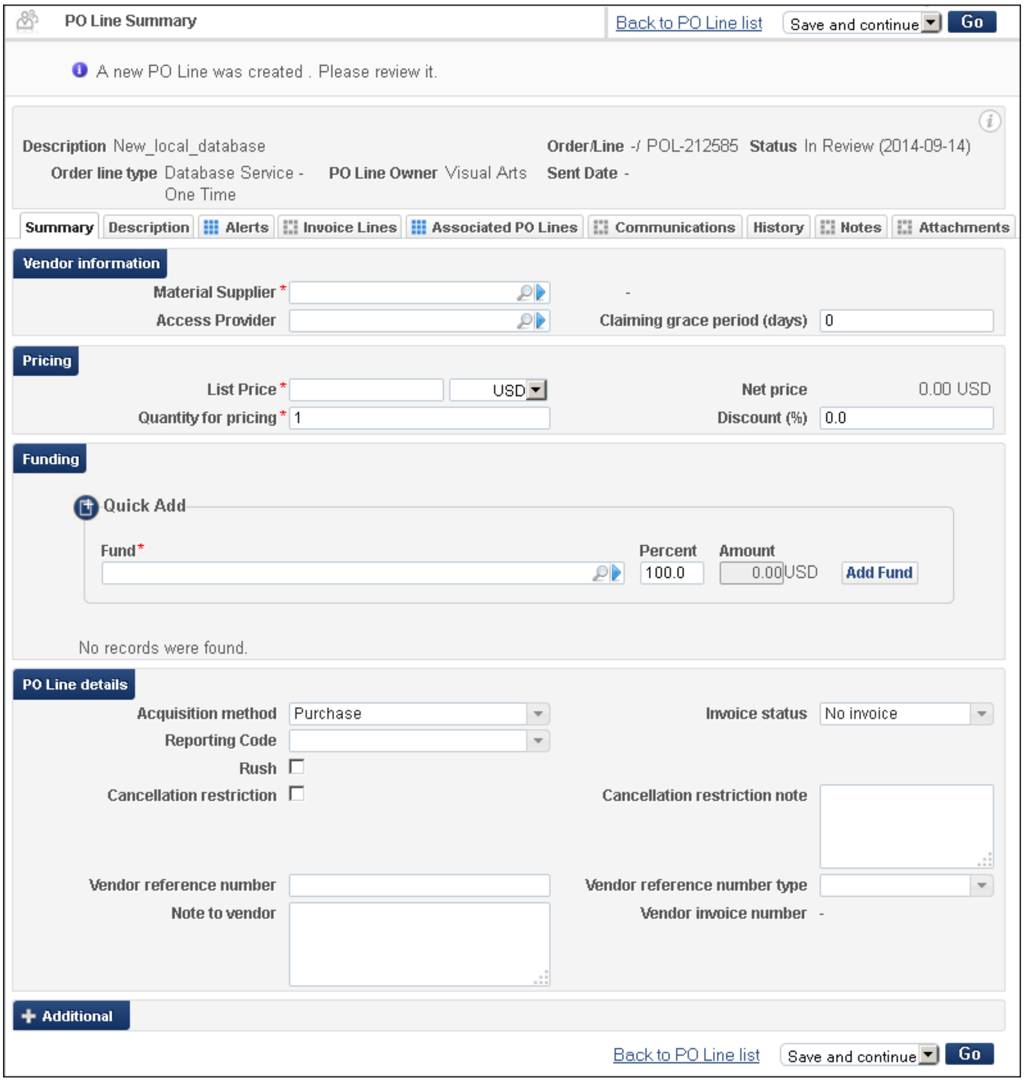


Figure 212: Add PO Line Information

4. When you have completed entering the PO line information, select **Order Now** from the drop-down list and click **Go**.
5. When the Confirmation Message box appears, click **Confirm**.

   The Purchase Order Lines in Review page opens and your usual acquisitions workflow can be completed.

NOTE:

Once the order has been completed, an electronic resource activation task is automatically added to the Electronic Resource Activation Task List. Refer to **Activating Electronic Resources** on page **392** for additional information.

To confirm/verify the discovery interface display:

1 Complete an **All titles** repository search for the online database.

The search results display for the online database. Refer to the figure below for an example.

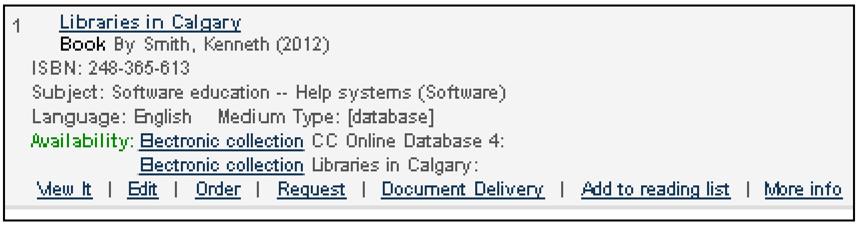


Figure 213: All Titles Repository Search Results for Online Database

NOTE:

To locate the online database inventory record with an **All titles** search requires that the online database record includes a repository link. The repository link is entered on the Additional Information tab in the **Additional descriptive information** option.

2 Click **View It**. The Electronic Services page opens.

3 Optionally, click **Display in a new window** to view the URL link stored with the online database settings.

Linking a Local Electronic Collection to the Community Zone

Alma provides the capability to link local electronic collections (including services and portfolios) to the Community Zone (CZ). This provides the benefits of CZ updates to the electronic collections/portfolios that you link to the CZ.

When you initially link an electronic collection to the CZ, you are provided the options to attempt to link the electronic collection, the service, and all the local portfolios. Once an electronic collection is linked to the CZ, you have the option to attempt to link any local portfolios that are part of the electronic collection to CZ portfolios that are part of the electronic collection (refer to **Linking a Local Portfolio to the CZ When the Portfolio is Part of a CZ-Linked Service/ Electronic Collection** on page 377 for related information).

This capability is implemented with the **Link to Community** action (refer to the procedure below) that is the first step in the process of linking resources to the

CZ. As part of this implementation, the system automatically executes a job to process your linking request to the CZ and provides a report of the results through **Monitor Jobs** (**Administration > Manage Jobs**).

The linking job called **Link local electronic resources to the Community Zone job** provides the following report information when the job has completed running:

- Total number of local portfolios processed
- Number of local portfolios linked to the CZ
- Number of local portfolios with no match
- Number of multiple bibliographic records with matches (with a link to a set containing MMS IDs)
- Number of multiple portfolio matches (with a link to a set containing MMS IDs)
- Number of bibliographic records linked to the Network Zone for collaborative networks (with a link to a set containing MMS IDs)
- Number of duplicate portfolios

The following local collection, service, and portfolio information is kept when the linking job is run:

- Group settings
- PO line and license
- Public name (electronic collection)
- Description
- Notes
- Library
- PDA ID (portfolios)

VIDEO:

For more information about linking local electronic collections to the CZ, see the *Link a Local Electronic Collection to a Community Zone Collection* video (6:11 mins).

To link a local electronic collection to the Community Zone:

1 Search for a local electronic collection that you want to link to the CZ. Your search results display the **Link to Community** action.

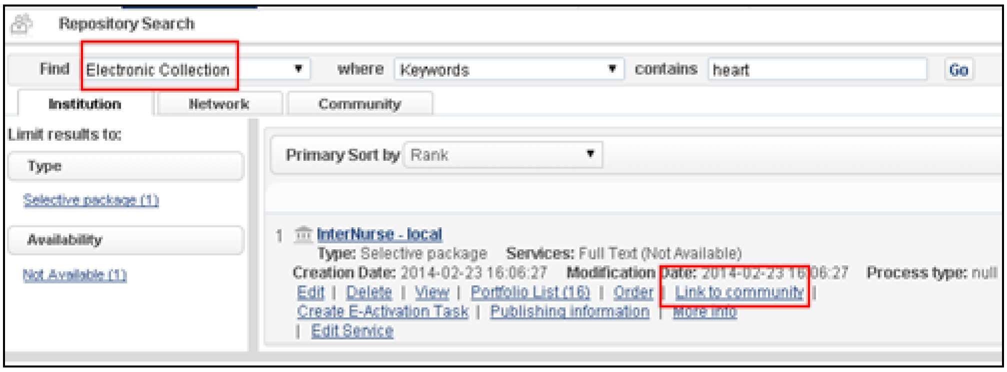


Figure 214: Electronic Collection Link to Community Action

2 Click **Link to Community**. The Link Electronic Resources to Community page opens. The page contains the following sections:

- Local Information. Within this section, the following information is provided:
  - Electronic collection name – This is the local electronic collection name that displayed in your search results
  - Type – This is the collection type (Selective package, Aggregator package, or Database)
  - Interface name
  - Service type (Full text, Select full text, or None)
  - Total number of portfolios
  - Number of local portfolios
- Community Information. Use this section to identify the name of the electronic collection to which you want to link in the CZ. Once you have specified this information, the **Type**, **Interface name**, and **Service type** information is updated based on the information provided by the CZ link.
- Bibliographic Records Configuration. Use this section to identify how you want the system to use the bibliographic record information available in the CZ. If you select **Yes** and a portfolio match is found in the CZ, the bibliographic record associated with the linked portfolio is the CZ bibliographic record. If you select **No** and a portfolio match is found in the CZ, the portfolio that is linked to the CZ portfolio will use the local bibliographic record. The match routine for this job uses either the ISSN or the ISBN identifier to confirm a match between the local portfolios in the electronic collection being linked with portfolios in the CZ.

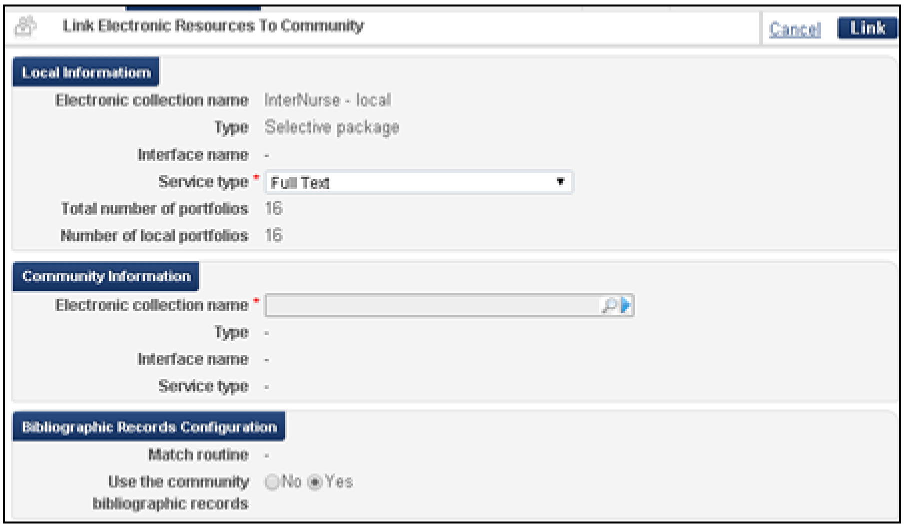


Figure 215: Link Electronic Resources to Community Page

3 Using the browse capability of the **Electronic collection name** option, locate the electronic collection in the CZ to which you want to link.

Figure 216: Browse CZ for Electronic Collection to Link To

Figure 217: Enter Browse Criteria

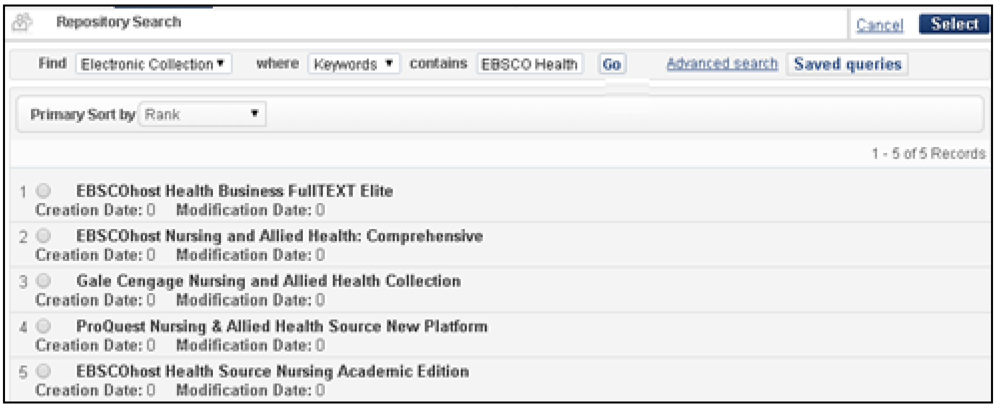


Figure 218: Browse Results

4 Select an electronic collection (radio button) from the list of results and click the **Select** button.

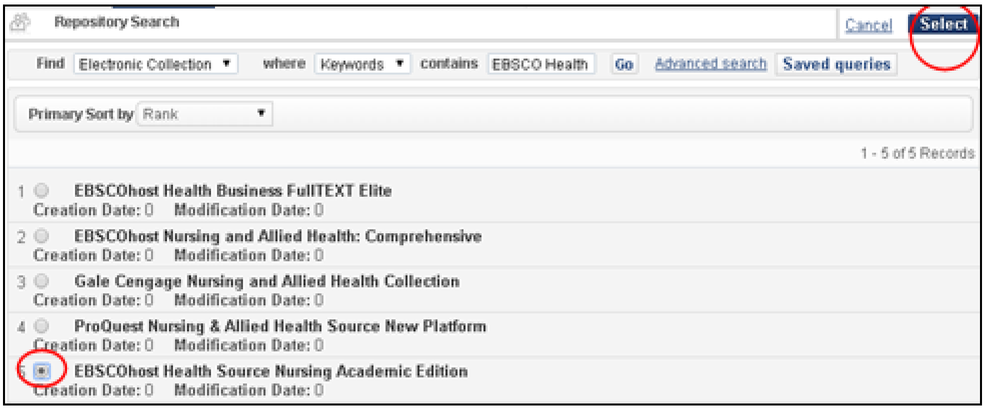


Figure 219: Select from the Results List

Alma displays your selection and related information on the Link Electronic Resources to Community page.

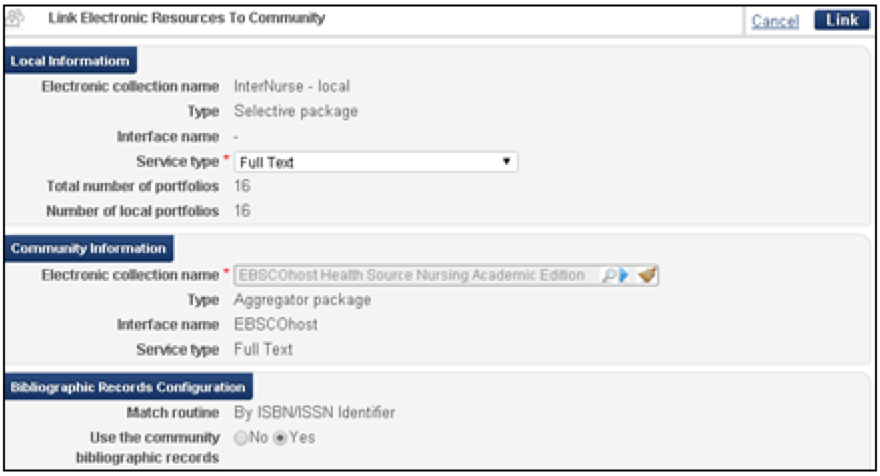


Figure 220: Electronic Collection Name Selected from the CZ

NOTE:

The fields in the Community Information section and the Bibliographic Records Configuration sections are dynamically updated once you have selected/entered the electronic collection name from the CZ.

5 Select **Yes** or **No** for the **Use the community bibliographic records** option and click **Link**. A pop-up dialog box opens with a summary/warnings regarding the linking selections that you have made.

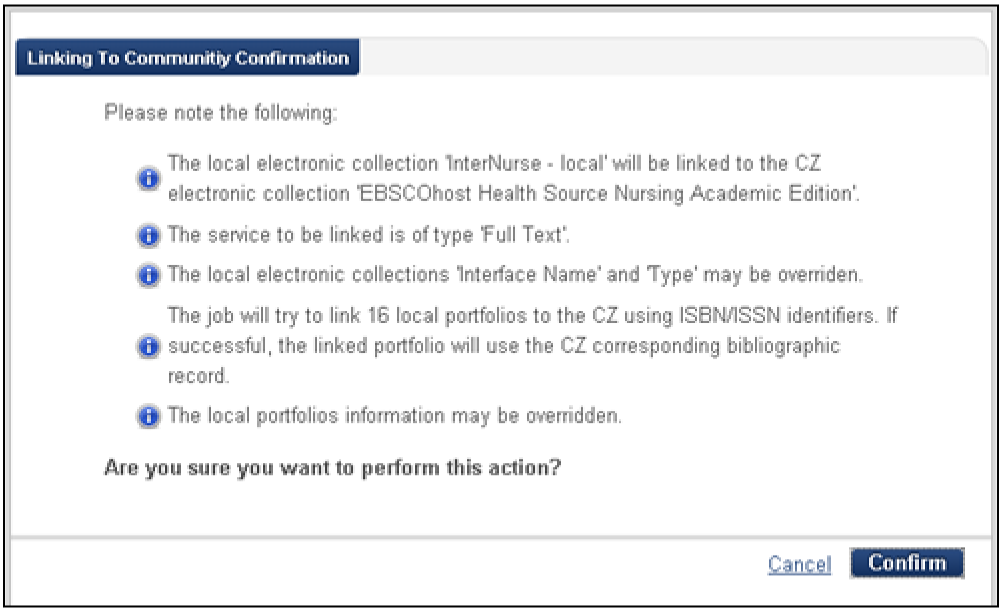


Figure 221: Linking Summary/Warnings

6 Review the information in the pop-up dialog box and, if everything is in order, click Confirm. The system displays a successful confirmation message that the linking job (your request) has been submitted. (This is the linking job that Alma automatically runs when you process a CZ link request as described in the previous steps.)

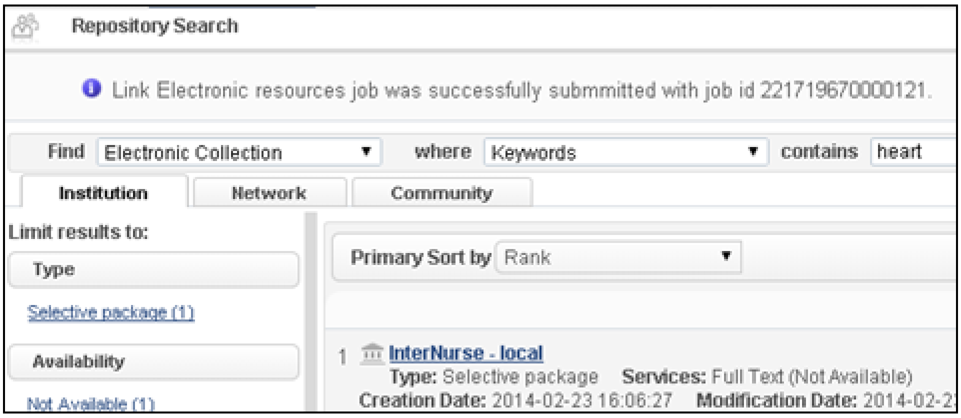


Figure 222: Job Submitted Successfully Message

7 Check the Job Monitor to review the status of your CZ linking job.

a Open the **Monitor Jobs** page (**Administration > Manage Jobs**).

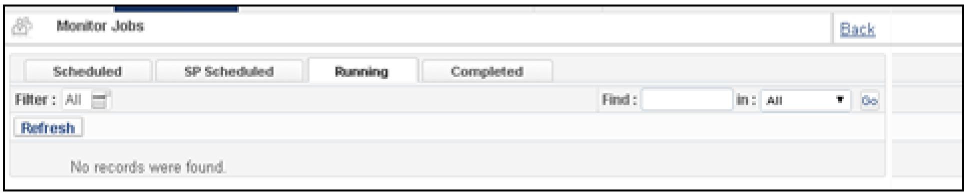


Figure 223: Monitor Jobs Page

b Select the **Completed** tab.

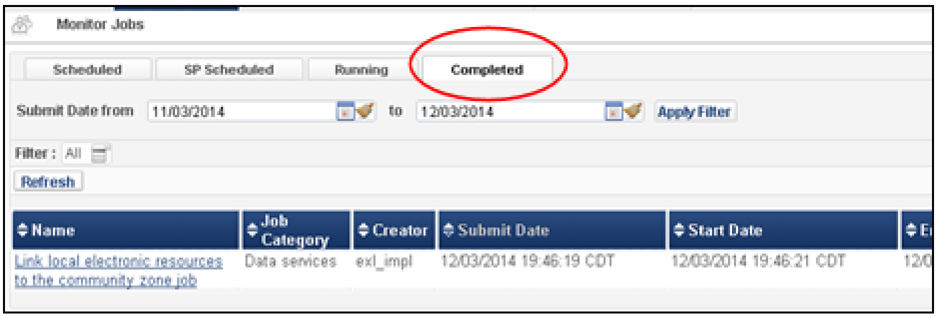


Figure 224: Monitor Jobs Completed Tab

c Locate the **Link local electronic resources to the Community Zone job** to display your job results.

d Select **Actions > Report** (or click the **Link local electronic resources to the Community Zone job** link in the Name column). The Job Report page opens.

Figure 225: CZ Linking Job Report

Managing Local Portfolios

PERMISSIONS:

To manage local portfolios, you must have the following roles:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)

Portfolios may be defined as standalone entities or as part of an electronic collection. As a result, Alma allows you to create and update portfolios separately from the workflow used to add local electronic collections. For more information on adding local electronic collections, see **Adding a Local Electronic Collection** on page **288**.

Alma provides inventory operators the ability to perform the following tasks for local portfolios:

- **Adding a Standalone Portfolio** on page **328**
- **Adding a Portfolio to an Electronic Collection** on page **333**
- **Adding a Set of Standalone Local Portfolios to a Local Electronic Collection** on page **333**

NOTE:
After you add a standalone portfolio, you can locate it using the repository search and link it to a matching portfolio in the Community Zone (CZ). For details, see the explanation for **Link to community** in .

Adding a Standalone Portfolio

Alma allows you to add standalone portfolios individually.

NOTE:
After you add a portfolio, you can locate it using the repository search and link it to a matching portfolio in the Community Zone (CZ). For details, see the explanation for **Link to community** in .

To add a local portfolio:

1 Select **Create Inventory > Add Local Portfolio** from the **Resource Management** menu. The New Portfolio page opens.

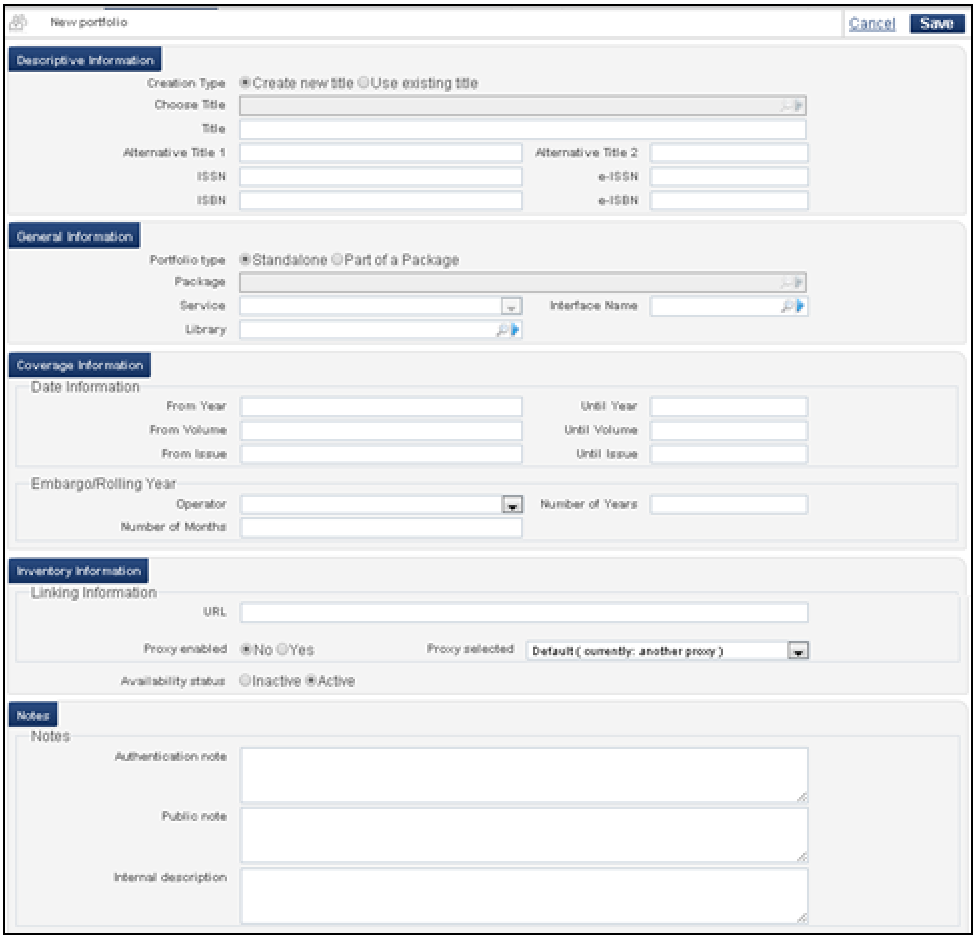


Figure 226: New Portfolio Page Options

2 Enter the required portfolio information as described in the following table, when **Portfolio Type** is set to **Standalone**. (For a portfolio that is part of an electronic collection, see **Adding a Portfolio to an Electronic Collection** on page 333.)

Table 42. New Portfolio Page Options (Standalone and Electronic Collection)

Field	Description
Descriptive Information:	
Creation Type	Either create a new title or use an existing title from the system.

Table 42. New Portfolio Page Options (Standalone and Electronic Collection)

Field	Description
Choose Title	Select an existing title. Click the Find icon to open the Repository Search page and select a bibliographic record that links to the repository.
Title	Enter a new title.
Alternative Title 1	Use these options to provide additional information if you created a new title.
Alternative Title 2	
ISSN	
e-ISSN	
ISBN	
e-ISBN	
General Information:	
Portfolio Type	Select **Standalone** or **Part of an electronic collection**.
Electronic Collection (for part of an electronic collection)	Links to an electronic collection in the repository. Click the Find icon to open the Repository Search page and select the electronic collection. **NOTE:** When you create a portfolio as a step in creating an electronic collection, the electronic collection link defaults to the one being created.
Service (for part of an electronic collection)	Select the service (such as Full Text) from the available service options for the selected electronic collection.
Interface name (for standalone)	Enter a vendor interface for the standalone portfolio. Use the Find icon to search from the available list of vendor interfaces.
Library (for standalone)	Enter the owning library. Ownership determines the organizational unit that manages the resource. (It does not determine who has access to the resource.) Library ownership is not required. Electronic resource ownership defaults to the institution level.

Table 42. New Portfolio Page Options (Standalone and Electronic Collection)

Field	Description
Coverage Information:	
Date Information:	
From Year	Coverage parameters that indicate the content that was purchased/activated. These parameters affect service resolution (such as Primo). Coverage is displayed in the repository search results.
Until Year	
From Volume	
Until Volume	
From Issue	
Until Issue	
Embargo/Rolling Year:	
Operator	Provides a moving wall of availability.
Number of Years	
Number of Months	
Inventory Information:	
Linking Information:	
Parser (for part of an electronic collection)	Provides the necessary linking information (if these details are not the same as the electronic collection linking information). Example: EBSCO_HOST::ebsco_am This defaults to the parser information available with the electronic collection that you selected in the General section.
Service parser parameters (for part of an electronic collection)	Provides the electronic collection's parser parameters. Example: db_host=poh&ebscohosturl = http://search.ebscohost.com & linkurl=http://openurl.ebscohost.com/linksvc/linking.aspx & shib=$$SHIBBOLETH & customer_id=$$CUSTOMER_ID This defaults to the service's parser parameters available with the electronic collection that you selected in the General section.

Table 42. New Portfolio Page Options (Standalone and Electronic Collection)

Field	Description
Parser Parameters or URL	Enter one of the following optional parameters as needed: ■ The portfolio-level parser parameters (part of an electronic collection), if this setting is different from the Service Parser Parameters previously identified (above). Alma uses the portfolio-level parser/parser parameters when they are different from the service-level parser/parser parameters. ■ The URL (standalone or part of an electronic collection) for accessing the portfolio. This URL overrides the URL created based on the parameters taken from the electronic collection, service, and portfolio.
Proxy Enabled	Specify **Yes** or **No**. Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding proxy relationships among portfolios, electronic collections, and services.
Proxy Selected	If you specify **Yes** for **Proxy Enabled**, you need to select a proxy from the drop-down list. Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information on how to create a proxy profile.
Availability Status	Indicate whether the portfolio is active or inactive.
Notes:	
Authentication Note	Use this note to specify additional information related to authentication
Public Note	Use this option to enter a note regarding the portfolio that displays for patrons.
Internal Description	Use this option to provide additional information to staff regarding the portfolio.

3 Click **Save and Continue** if you want to save the new portfolio and add additional portfolios or **Save** if you want to save the new portfolio and return to the Alma home page.

Once you have saved a portfolio, you can test the link access using the Alma Resolver that displays results on the Electronic Services page. Refer to **Using the Alma Resolver Debugger Tool** on page **420**.

Adding a Portfolio to an Electronic Collection

Alma allows you to add portfolios individually to electronic collections at any time.

To add a portfolio to an electronic collection:

1. Select **Create Inventory > Add Local Portfolio** from the **Resource Management** menu. The New Portfolio page opens.
2. Enter the required portfolio information as described in **Table 42**, making sure that **Portfolio Type** is set to **Part of an Electronic Collection** and the associated electronic collection and service are specified. (For a standalone portfolio, refer to **Adding a Standalone Portfolio** on page **328**.)
3. Click **Save and Continue** if you want to save the new portfolio and add additional portfolios or **Save** if you want to save the new portfolio and return to the Alma home page.

NOTE:

For additional information, refer to the presentation *How to Add Local Portfolios to Local Electronic Collections* located in the Documentation Center. Remember, you must be logged in to the Documentation Center in order to view this presentation.

Adding a Set of Standalone Local Portfolios to a Local Electronic Collection

By adding a set of standalone local portfolios to a local electronic collection service, you can more easily manage portfolios (activate, deactivate, export, and delete as a group versus individually, one at a time). Once portfolios are grouped into an electronic collection, you can use the portfolio loader capabilities to maintain the portfolios. (Refer to **Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)** on page **339** for information about using Load Portfolios.)

To add a set of local standalone portfolios to a local electronic collection:

1. Create a set of local standalone portfolios.
2. To add the set of standalone portfolios to an existing local electronic collection, do the following or skip to step **3**.
   a. Complete a search to locate the existing local electronic collection.
   b. Click **Edit Service** and continue with step **4**.
3. To add the set of standalone portfolios to a new local electronic collection:

a On the Electronic Collection Editor page (**Resource Management > Create Inventory > Add Local Electronic Collection**), enter the **Public name** for the electronic collection and other details.

NOTE:
You can specify the service type (Full Text or Selected Full Text) on the Electronic Collection Editor page (eliminating additional steps to make this specification).

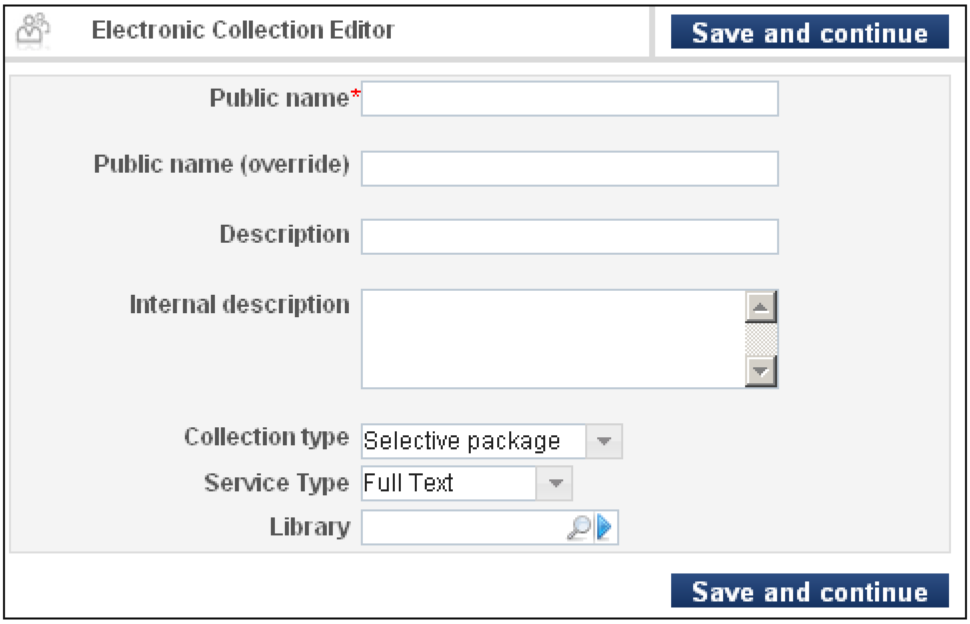


Figure 227: Electronic Collection Editor Page

b Click **Save and Continue**. The Electronic Service Editor page opens.

4 Select the **Portfolios** tab.

5 Click the **Add from set** button. The Add From Set page opens.

6 Search/select the set name (that you created/saved in step **1**).

Figure 228: Standalone Portfolio Set

7 Click **Submit**. An electronic collection confirmation message opens.

Figure 229: Electronic Collection Confirmation Message

8 Click **Confirm**. The Electronic Service Editor page shows a job submitted message, and a System Job Notification message is emailed with the job details.

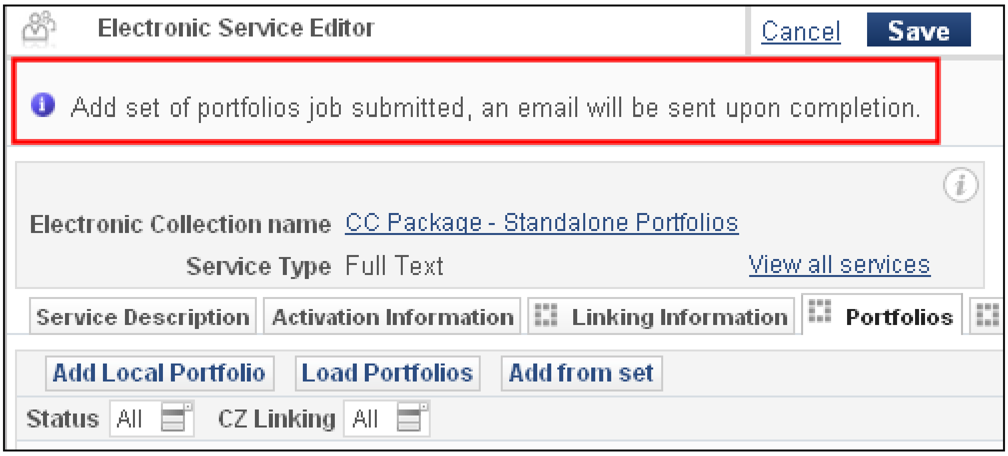


Figure 230: Job Submitted Message

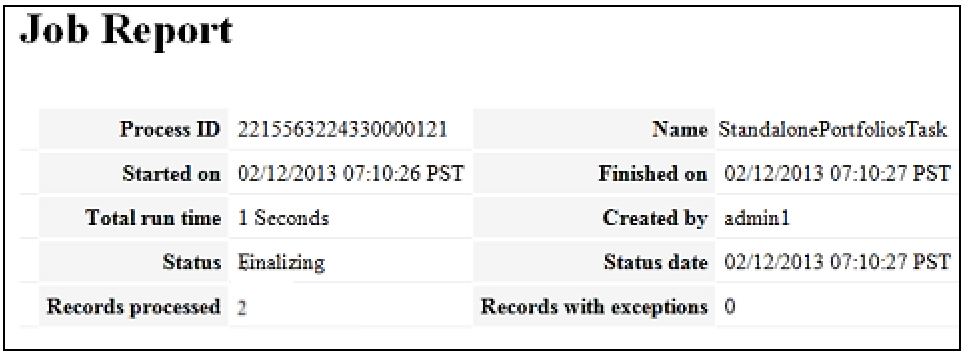


Figure 231: Emailed Job Report Example

9 Click **Save**. The Electronic Collection Editor page displays with an electronic collection successfully updated message.

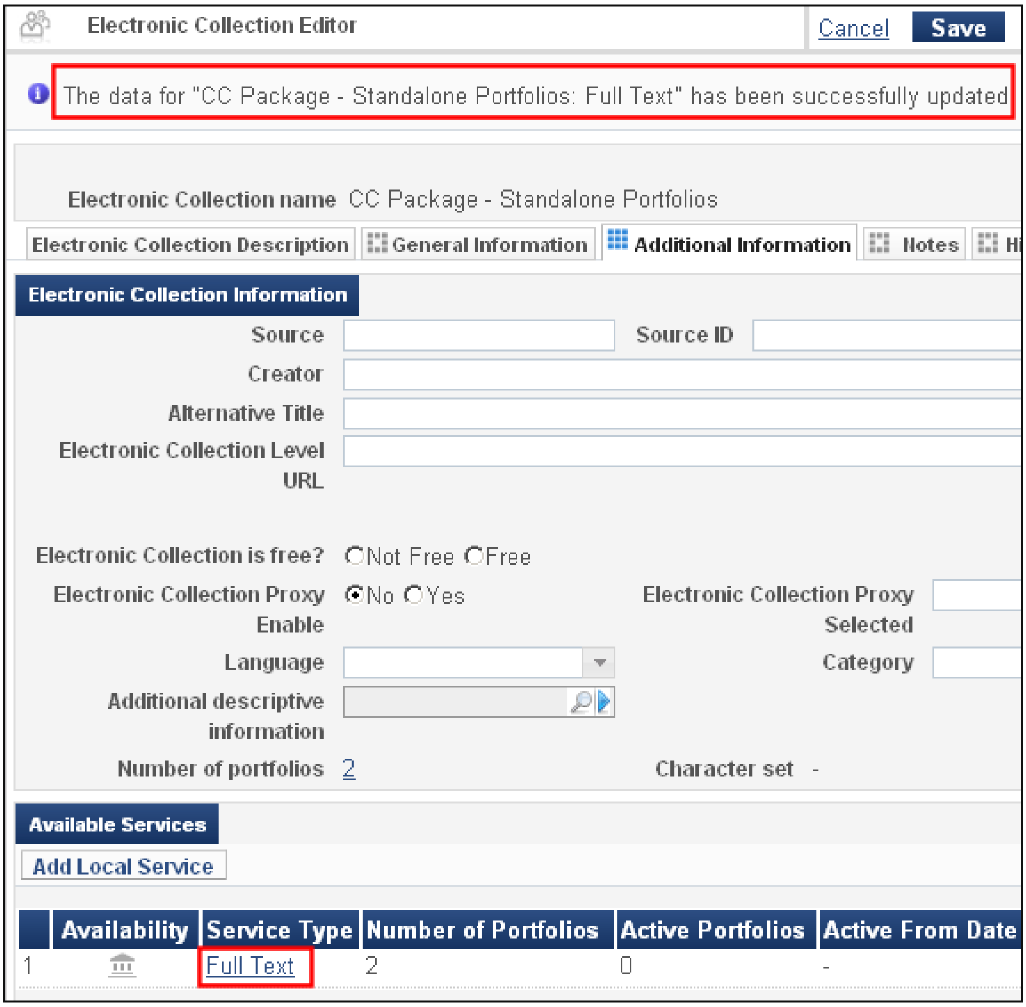


Figure 232: Electronic Collection Successfully Updated Message

10 Click **Full Text** in the Available Services section and select the **Portfolios** tab to view the standalone portfolios added to the electronic collection.

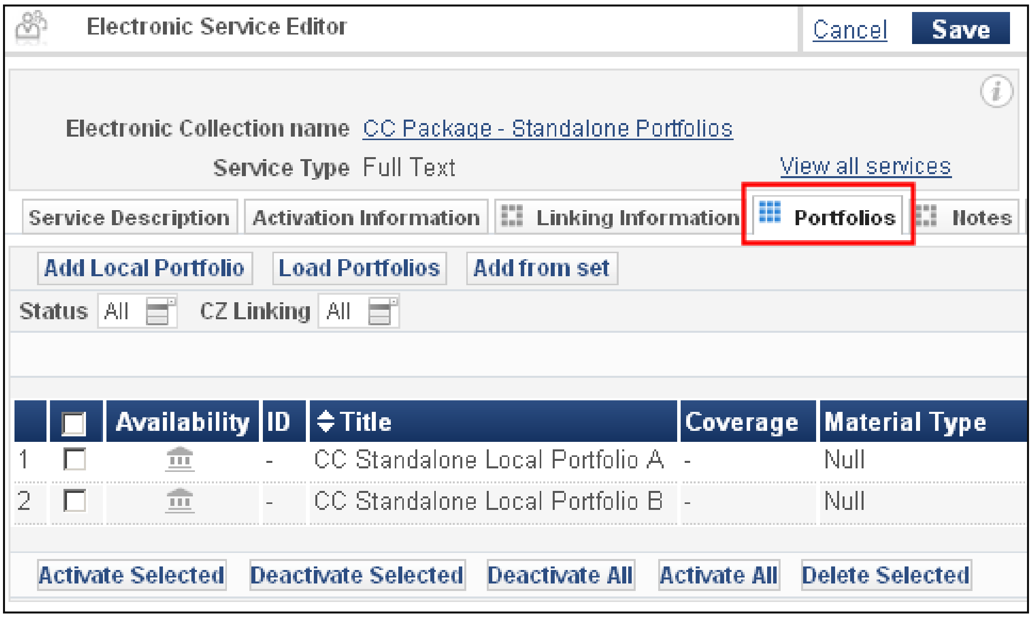


Figure 233: Standalone Portfolios Added to Electronic Collection

NOTE:

For end-result examples of where the Electronic Collection name displays in your search results in Alma and Primo related to the local portfolios that you've added to an electronic collection, refer to the "Viewing the Local Electronic Collection in Alma" pages in *How to Add Local Portfolios to Local ElectronicCollections*. (You need to be logged in to the Documentation Center in order to view this document.)

Removing a Local Portfolio from a Local or CZ Electronic Collection

Alma provides the option to remove a local portfolio from a local or CZ electronic collection. By removing a local portfolio from a local or CZ electronic collection, you turn it into a standalone portfolio.

To remove a local portfolio from a local or CZ electronic collection:

1. Complete a repository search for the local or CZ electronic collection containing the local portfolio that you want to remove.
2. For the electronic collection, in your search results, containing the local portfolio to be removed, click **Edit Service**.
3. Select the **Portfolios** tab. The electronic collection contents display.

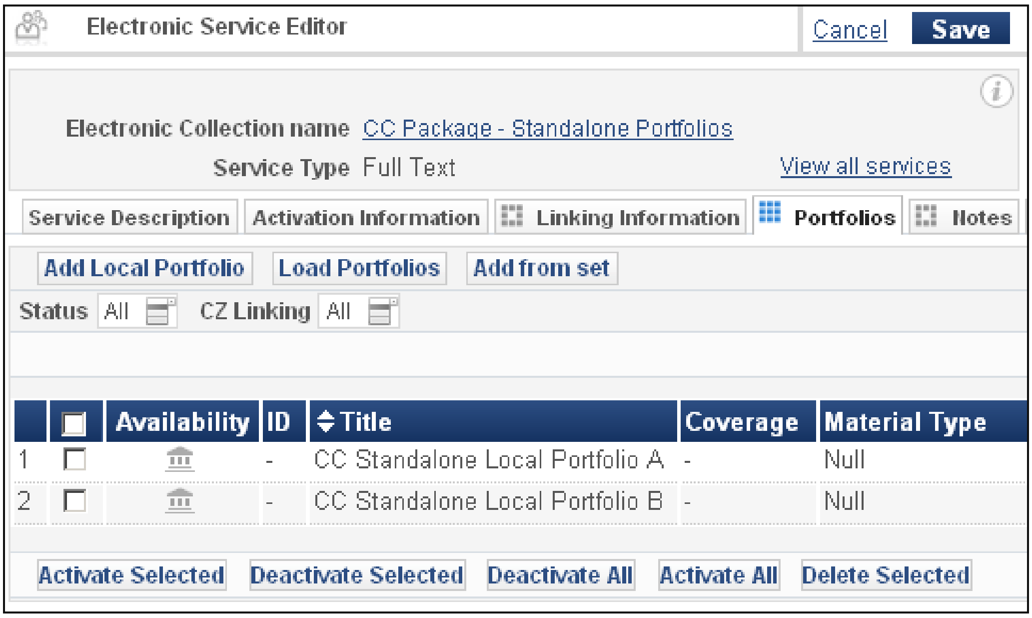


Figure 234: List of Standalone Portfolios in the Electronic Collection

4 Select **Actions > Remove** for the local portfolio to be removed from the electronic collection.

This causes the local portfolio to be reverted back to a standalone portfolio.

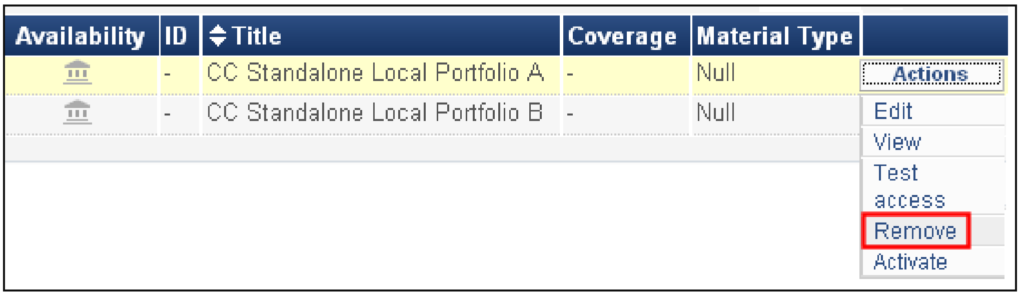


Figure 235: Actions > Remove Standalone Portfolio

The page refreshes to display the collection contents minus the local portfolio that was removed.

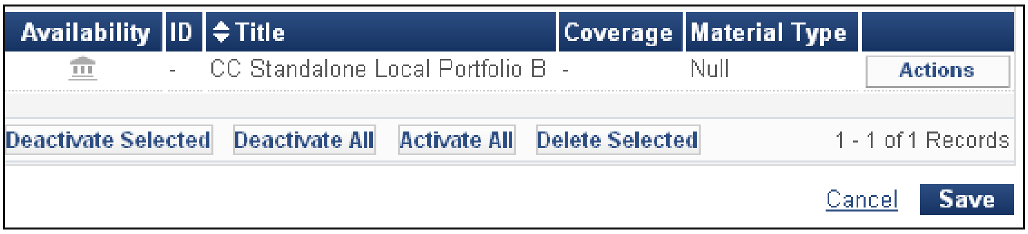


Figure 236: Updated Portfolio List Minus the Removed Local Portfolio

5 Click **Save**.

Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)

You can create, update, and delete portfolios for an electronic collection in batch mode by uploading an Excel spreadsheet that contains a list of portfolios. For more information these Excel spreadsheets, see **Working with the Excel Batch File** on page **343**.

The file upload wizard allows you to load a complete set of portfolios or just the ones that have been updated since the last load.

To add multiple portfolios using a batch process:

1 Click **Load Portfolios** from the Portfolios tab on the Electronic Service Editor page.

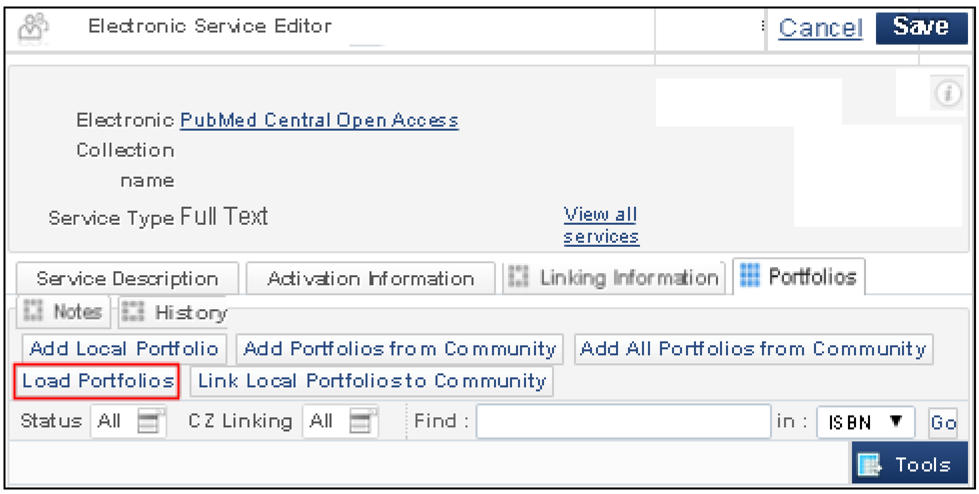


Figure 237: Electronic Service Editor Page Portfolios Tab/Load Portfolios

The Activation Wizard File Upload page opens. Refer to **Working with the Excel Batch File** on page **343** for details regarding the structure and content of the Excel file for the batch upload.

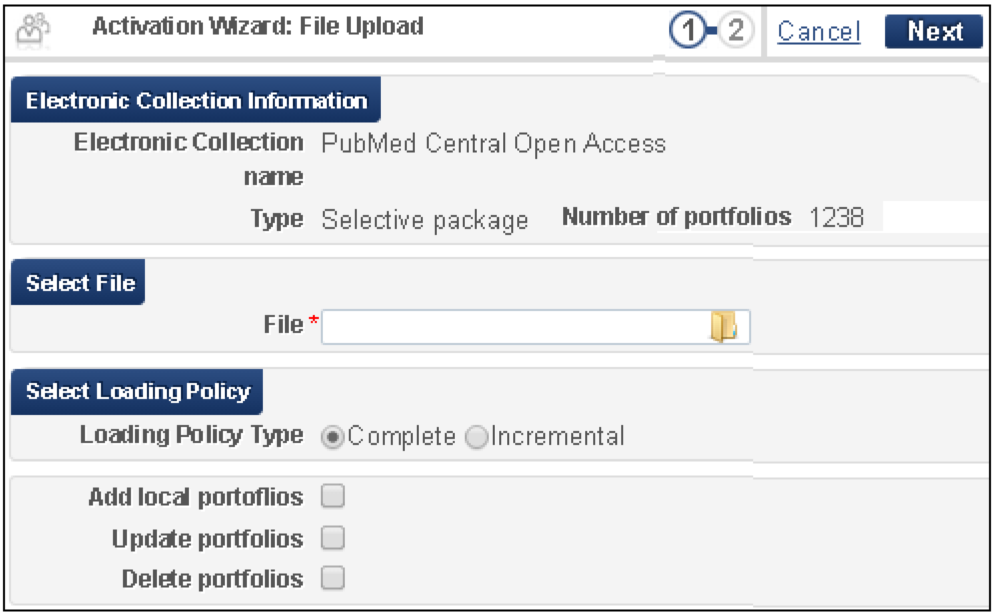


Figure 238: Activation Wizard File Upload Page - Wizard Step 1

2 Enter the name and path of the Excel file (with either the `.xls` or `.xlsx` extension) you prepared (refer to **Working with the Excel Batch File** on page 343), or click **Browse** to select the file.

3 Select one of the following **Loading Policy Types** in the **Select Loading Policy** section:

- **Complete** – Loads a complete set of portfolios, overwriting any existing portfolios. The following options are available when the Complete loading policy type is selected:
  - **Add local portfolios** – Selecting this option indicates that you want the system to process the portfolios (in the input Excel file) in the following manner:

    If a match is found in the CZ for the portfolio, the portfolio is added and linked to the CZ.

    If a match is not found in the CZ for the portfolio (based on the identifier), a match is attempted in the IZ and, if found, the portfolio is added as a local portfolio in the electronic collection. Otherwise, a new local portfolio record is created and added to the electronic collection.
  - **Update portfolios** – Alma updates existing local portfolios with the information listed in the Excel file for the matching portfolios when this option is selected. For portfolios linked to the CZ, only the override information in the portfolio is updated when this option is selected.

- **Delete portfolios** – Select this option to indicate that:

  – If portfolios are in the CZ-linked electronic collection and not in the Excel file, they will be deleted

  – If portfolios are in the Excel file but not in the CZ-linked electronic collection, they will be activated from the CZ (if they exist in the CZ)

  This differs from how the system processes the Excel file contents when the **Delete** option for the **Incremental** loading policy type is selected (refer to the description below).

  The **Delete portfolios** option provides the following additional options to enable you to specify how you want to handle bibliographic records when deleting portfolios results in bibliographic records without inventory:

  – **Delete bibliographic record(s)**

  – **Suppress bibliographic record(s)**

  – **Do nothing**

- **Incremental** – Loads a file that includes only the incremental changes to the portfolio list of a specific electronic collection. With this option, you can load only the portfolios that have been updated since the last load.

  When you choose Incremental, the page refreshes to display the following incremental options:

  - **Add New** – This operation adds all portfolios that are listed (in the file provided) as new local portfolios to the electronic collection.

  - **Update** – This operation updates the details of all electronic collection portfolios that are listed in the file.

  - **Delete** – Select this option to indicate that:

    – If local portfolios are in the Excel file and in the electronic collection, they will be deleted

    – If portfolios are in the Excel file and not in the electronic collection, they will be activated from the CZ (if they exist in the CZ)

    This differs from the **Delete portfolios** option under the **Complete** loading policy type (refer to the description above).

    The **Delete** option provides the following additional options to enable you to specify how you want to handle bibliographic records when deleting portfolios results in bibliographic records without inventory:

    - **Delete bibliographic record(s)**
    - **Suppress bibliographic record(s)**
    - **Do nothing**

4 From the Select Loading Policy section, select **Complete** and **Add local portfolios** (for this example of using the wizard).

NOTE:
For additional examples of the loading policy types, refer to *Using the Alma Portfolio Loader - Examples*. (You need to be logged in to the Documentation Center in order to view this document.)

5 Click **Next**. The Excel file is validated and imported.

If there are errors in the Excel file, the Activation Wizard File Upload page specifies that errors exist. Click the **Download Excel file to correct validation errors** link and open the file. Correct the errors in your original Excel file and re-import/upload the file as described in the previous steps.

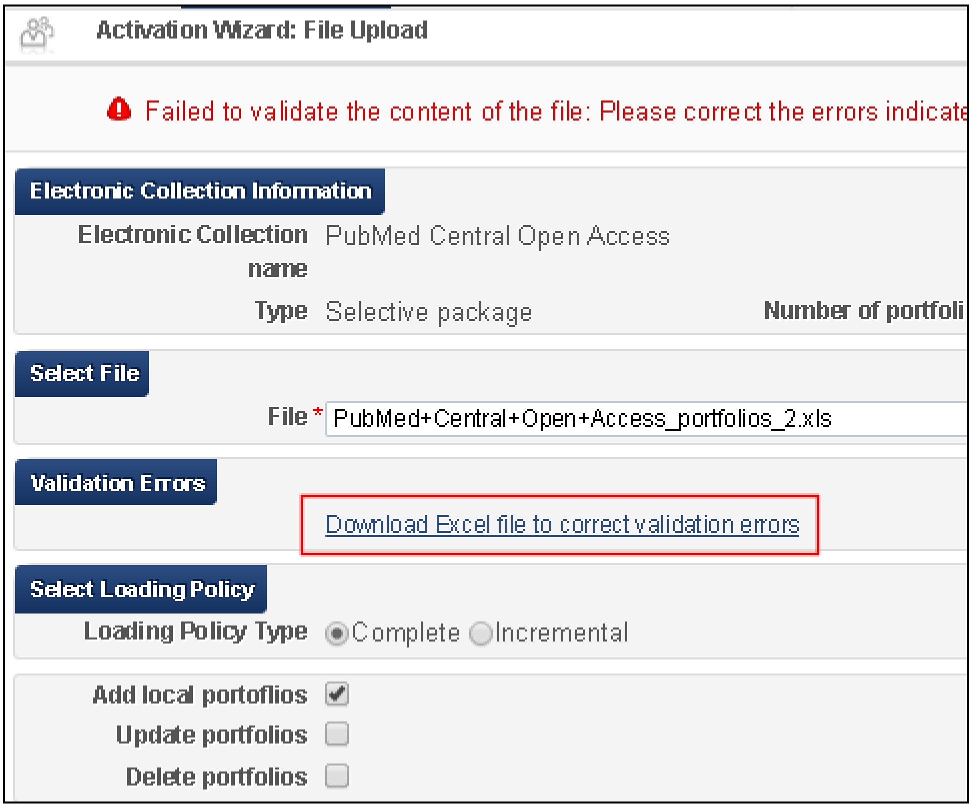


Figure 239: Download Excel File to Correct Validation Errors Link

If the file has no errors and is validated, the **Activation Wizard: Activation Summary** page opens, displaying the number of portfolios to be activated as well as the number of portfolios to be created locally.

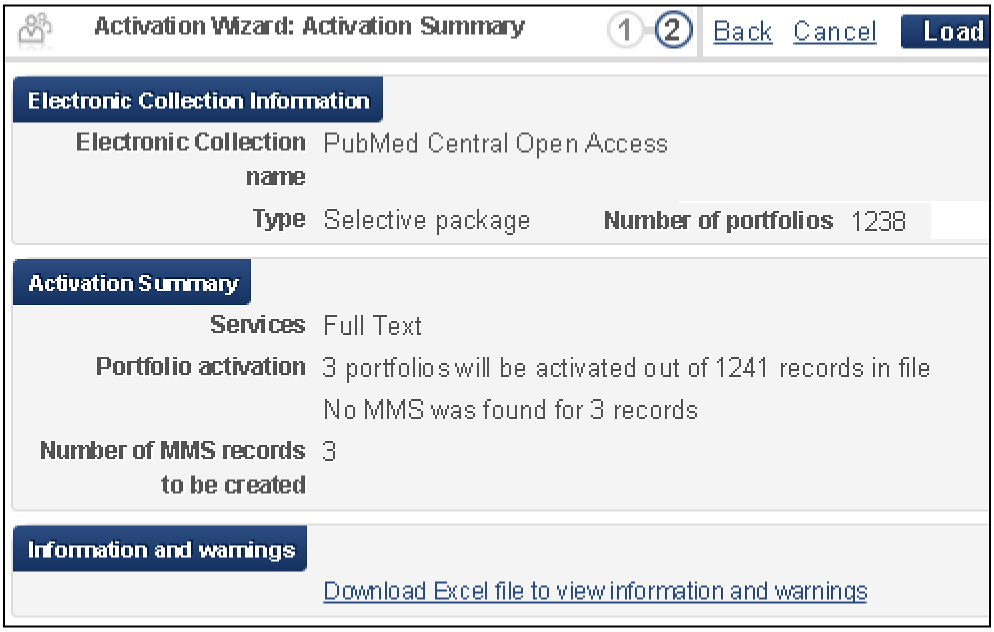


Figure 240: Activation Wizard: Activation Summary Page - Wizard Step 2

To view information and warnings in the Excel file, click the **Download Excel file to view information and warnings** link.

6. Click **Load**. Alma returns to the Electronic Service Editor page and displays a confirmation message that the upload job has been submitted.
7. Click **Save**. Alma displays a confirmation that the data has been successfully updated.

Working with the Excel Batch File

VIDEO:

Refer to *Portfolio Export/Import Improvements* for a detailed description of enhancements available when exporting and importing the electronic portfolios of a given service (8:30 mins). Note that this video was produced in December 2013 and that some elements that are shown may have changed in Alma since then.

Portfolio information such as proxy settings, URL, parser parameters, and Available For groups can be imported and exported via an Excel spreadsheet.

The following table describes the fields that the Excel file (located in the **Alma > Product Documentation > Resource Management** folder in the Documentation Center) should contain.

NOTES:

- The supported formats are .xls and .xlsx.
- Local portfolios can be loaded, using Load Portfolios (refer to **Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)** on page **339**) without an identifier such as an ISSN, ISBN, or portfolio ID.

Table 43. Excel File Fields

Field	Description
ISSN	Enter one or more (for cases in which more than one ISSN—such as an E-ISSN—exists) ISSN identifiers. Alma uses the first identifier that provides a successful match. **NOTE:** At least one of the following must be available in the Excel file: PORTFOLIO_PID, ISSN, or ISBN.
ISBN	Enter one or more (for cases in which more than one ISBN—such as an E-ISBN—exists) ISBN identifiers. Alma uses the first identifier—ISBN10 or ISBN13—that provides a successful match. **NOTE:** At least one of the following must be available in the Excel file: PORTFOLIO_PID, ISSN, or ISBN.
PORTFOLIO_PID	The internal PID number used for the portfolio in Alma. This identifier is available only if you clicked the **Extended Export** button and exported portfolios listed in the Electronic Service Editor Page Portfolios tab to Excel. It is exported in cases where there is no ISSN or ISBN.
MMS	This field is used for the Alma MMS ID.
TITLE	Enter the `245 |a` to apply for this title. This field is added to the local portfolio information when **Add local portfolios** is selected (see procedure below) and no match is found.
FROM_YEAR	The coverage start date of the title (in YYYY format).
TO_YEAR	The coverage end date of the title (in YYYY format).

Table 43. Excel File Fields

Field	Description
FROM_VOLUME	The numeric volume number from which the title coverage begins.
TO_VOLUME	The numeric volume number at which the title coverage ends.
FROM_ISSUE	The numeric issue number from which the title coverage begins.
TO_ISSUE	The numeric issue number at which the title coverage ends.
WARNINGS	This field provides an Alma system-generated message to let you know that multiple coverages have been defined and that only the first coverage defined is being exported.
PUBLICATION_DATE_OPERATOR	Embargo date operator. Use one of the following: >, <, or =
PUBLICATION_DATE_YEAR	Enter the number of years for coverage information. This relates to the **Number of Years** field for Embargo/Rolling Year under Coverage Information for a portfolio (refer to **Table 42**).
PUBLICATION_DATE_MONTH	Enter the number of months for coverage information. This relates to the **Number of Months** field for Embargo/Rolling Year under Coverage Information for a portfolio (refer to **Table 42**).
GLOBAL_FROM_YEAR	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_TO_YEAR	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_FROM_VOLUME	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_TO_VOLUME	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_FROM_ISSUE	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.

Table 43. Excel File Fields

Field	Description
GLOBAL_TO_ISSUE	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_WARNINGS	This field provides an Alma system-generated message to let you know that multiple global coverages have been defined and that only the first coverage defined is being exported.
GLOBAL_ PUBLICATION_DATE_ OPERATOR	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_ PUBLICATION_DATE_ YEAR	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
GLOBAL_ PUBLICATION_DATE_ MONTH	This field is used for global coverage information as shown on the Electronic Portfolio Editor > Coverage Information tab.
AVAILABILITY	Specify one of the following values: ■ ACTIVE ■ INACTIVE
PUBLISHER	Free text. This field is added to the local portfolio information when **Add local portfolios** is selected and no match is found.
URL	Use this field to provide a URL that is only intended for overriding URLs of global portfolios or for setting a URL on local portfolios. This field is added to the local portfolio information when **Add local portfolios** is selected and no match is found.
PARSER_PARAMETERS	Use this field to specify linking information (like on the **Linking Information** tab in the Electronic Service Editor).

Table 43. Excel File Fields

Field	Description
PROXY_ENABLE	Specify true or false (until the June release, use lowercase letters). True is the same as selecting the **Yes** radio button for **Proxy enabled** on the Linking Information tab in the Electronic Portfolio Editor. False is the same as selecting the **No** radio button for **Proxy enabled** on the Linking Information tab in the Electronic Portfolio Editor. **NOTE:** The "portfolio" PROXY_LEVEL must be specified in order to use PROXY_ENABLE.
PROXY_SELECTED	When you specify true for the PROXY_ENABLE field, you need to specify the proxy to be used. **NOTE:** The "portfolio" PROXY_LEVEL must be specified in order to use PROXY_ENABLE.
PROXY_LEVEL	Specify portfolio or service.
AUTHOR	Free text. This field is added to the local portfolio information when **Add local portfolios** is selected and no match is found.
ELECTRONIC_ MATERIAL_TYPE	Specify one of the values from the drop-down list.
OWNERSHIP	Use this field to specify the name of the library that owns the portfolio.
GROUP_NAME	Use this field to enter the name of the Available For group. Multiple group names may be specified in this field when separated by a semicolon. **NOTE:** This field is specific to collaborative network and multicampus institutions and should be left blank otherwise.
AUTHENTICATION_ NOTES	This field is used for authentication notes as shown in the Electronic Portfolio Editor > Portfolio Information tab.
PUBLIC_NOTES	This field is used for public notes as shown in the Electronic Portfolio Editor > Portfolio Information tab.

Table 43. Excel File Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>INTERNAL_ DESCRIPTION</td><td>This field is used for an internal description as shown in the Electronic Portfolio Editor > Portfolio Information tab.</td></tr>
<tr><td>COVERAGE_ STATEMENT</td><td>Use this field for one of the following coverage statements that displays on the Coverage Information tab in the Electronic Portfolio Editor:
■ Only local
■ Global and local
■ Global or local
■ Only global</td></tr>
<tr><td>ACTIVATION_DATE</td><td>This field is used for the activation date information as per the Electronic Collection Editor > General Information tab.</td></tr>
<tr><td>EXPECTED_ ACTIVATION_DATE</td><td>This field is used for the expected activation date information as per the Electronic Collection Editor > General Information tab.</td></tr>
<tr><td>LICENSE</td><td>This field is used for the license details information as per the Electronic Collection Editor > General Information tab and the Electronic Portfolio Editor > Portfolio Information tab.

NOTE:
When using the Extended Export tool from a portfolio list resulting from a Repository search (refer to Figure 241), the exported Excel file contains an extra License Name column. This column is not used during an import/portfolio load.</td></tr>
<tr><td>PDA</td><td>This field is used to identify patron-driven acquisitions as shown in the Electronic Portfolio Editor > Portfolio Information tab.</td></tr>
<tr><td>NOTES</td><td>Enter any notes you would like included in the portfolio’s public note field.

NOTE:
Notes are appended to existing note content when imported. Duplicate note content may occur when you export notes and, subsequently, import the same note content.</td></tr>
</table>

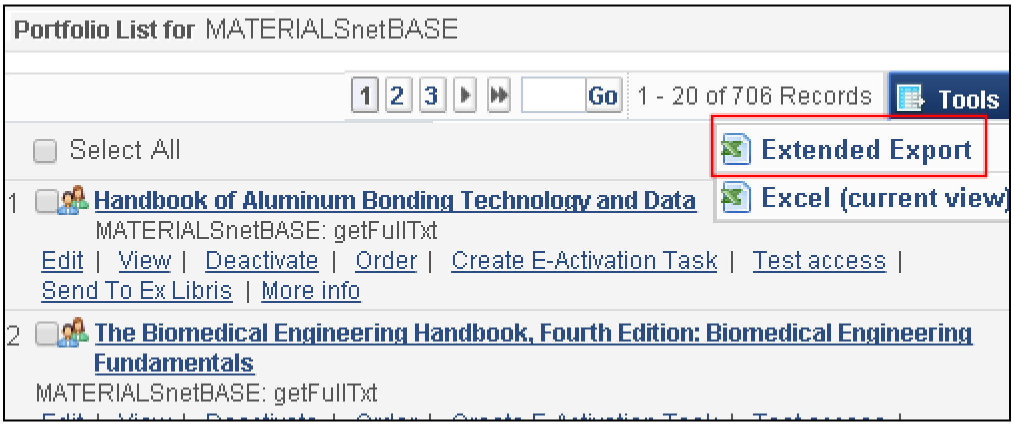


Figure 241: Extended Export Tool

The Excel spreadsheet is formatted with the first row containing the heading information (for each field) and each subsequent row containing the information for a single portfolio. Refer to the example below.

	A	B	C	D	E	F	G	H	I	J
1	ISSN	ISBN	TITLE	FROM_YE	TO_YEAR	FROM_V(	TO_VOLU	FROM_IS	TO_ISSUI	PUBLICA
2	0027-763		Nagoya m	1950						
3	0023-608		Journal of	1961	2009					
4	0029-452		Notre Dan	1960						

Figure 242: Upload Portfolios Partial Spreadsheet Example

Modifying a Portfolio Using the Electronic Portfolio Editor

During the creation of a portfolio, the system uses the New Portfolio page to add portfolios to an electronic collection or to create standalone portfolios. The Electronic Portfolio Editor page allows you to update this information on the following tabs:

- Portfolio Information
- Linking Information
- Coverage Information
- Notes
- Group Settings (for collaborative network/multicampus environments)

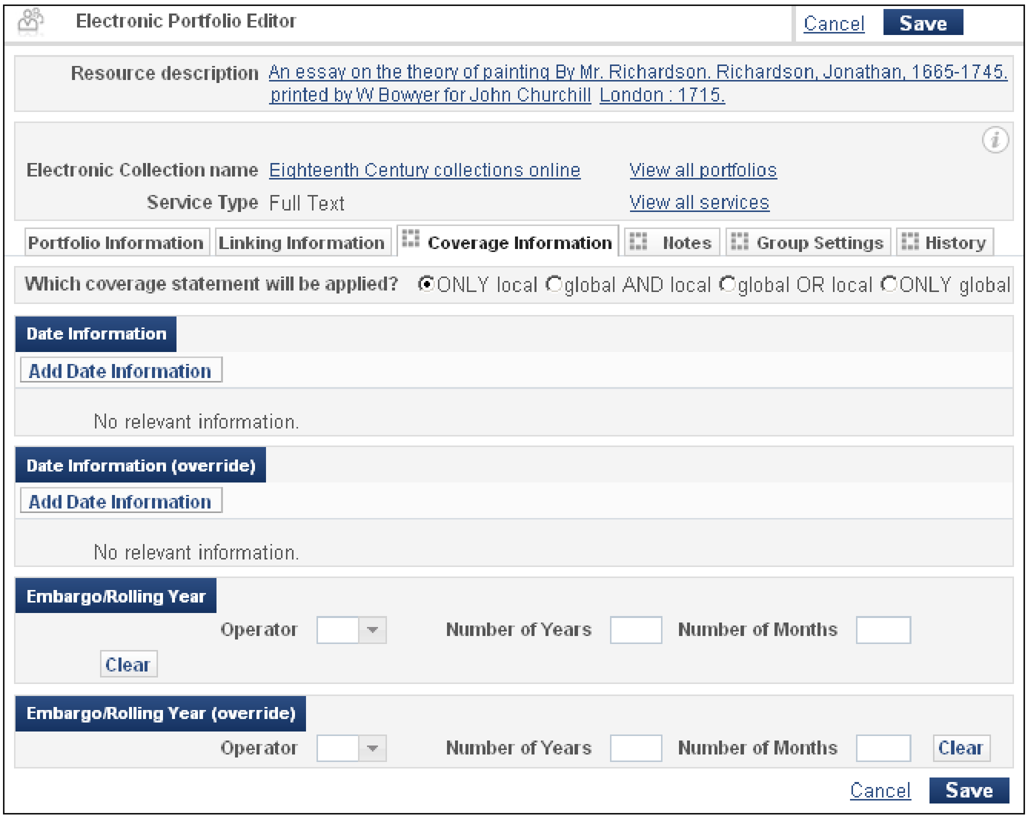


Figure 243: Electronic Portfolio Editor - Default Tab (Coverage Information)

To modify an electronic portfolio:

1. Search for the electronic portfolio that you want to update. For more information, see **Using the Alma Repository Search** on page 18.

   The brief results display for the electronic portfolio.

2. Click **Edit**.

   The Electronic Portfolio Editor page opens.

3. Update the fields on each tab as needed. Refer to the following table for more information.

Table 44. Electronic Portfolio Editor Page

Field	Description
Resource Description	Displays the title of the electronic portfolio. Click the title to display the simple view of the MARC record.
Relink to another bibliographic record	Use this option for times when a portfolio is associated with an incorrect descriptive record; or perhaps, there is a better descriptive record for a portfolio and you want to relink it to a different bibliographic record. Refer to the procedure **To relink a portfolio to a different bibliographic record:** on page 357 for more information. This functionality applies to: ■ Local standalone portfolios ■ Portfolios that are part of a Community Zone collection or a local collection
Attach to a collection	Use this option to link a single, standalone portfolio to an existing electronic collection via the Electronic Portfolio Editor. **NOTE:** The **Attach to a collection** button only displays for standalone portfolios. Refer to the procedure **To link a standalone portfolio to an electronic collection (from the Electronic Portfolio Editor):** on page 360 for more information.
Electronic Collection Name	(Electronic Collection only) Displays the electronic collection name.
Interface Name	(Standalone only) Displays the interface name for standalone portfolios.
Service Type	Displays the type of service for the portfolio.
Portfolio Information tab:	
Portfolio availability	Indicates whether the portfolio is active. When activated, the current date is entered in the **Activation date** field. When inactivated, the **Expected activation date** field is enabled.

Table 44. Electronic Portfolio Editor Page

Field	Description
Electronic material type	For standalone portfolios, select the electronic material type from the drop-down list of options. **NOTE:** The material type manifests itself only in the Get It and Details tabs in Primo. To customize the labels of the material types, see **Configuring Physical Item Material Type Descriptions** on page **740**
Activation date	Indicates the date on which the portfolio was activated.
Expected activation date	When the portfolio is inactive, this field allows you to specify an expected date of activation.
Interface name	(Standalone only) Allows you to choose an interface from the Select Vendor Interfaces page.
Library	(Standalone only) Specify the name of the owning library.
Electronic Collection PO Line	(Electronic Collection only) Displays the PO line for the electronic collection.
PO Line	This option is for your PO line information.
PO line details	Provides the PO line details, if available.
License	Click the Find icon and select the active license from the Licenses and Amendments page.

Table 44. Electronic Portfolio Editor Page

Field	Description
PDA	Use this option to associate migrated electronic books to a PDA program without the extra steps of recreating the PDA program from the beginning for those resources. Click the **Browse** icon to display the Patron Driven Acquisition List page and select a PDA from the list to assign to the portfolio. **NOTE:** To assign a PDA to a set of electronic portfolios, run the **Change electronic portfolio information** job (**Administration > Manage Jobs > Run a Job** and filter on **Type=Information Update**). Refer to **Performing Global Changes on Portfolios** on page **368** for more information. **VIDEO:** For more information about assigning a PDA to an electronic portfolio, refer to the *Assign a PDA to Electronic Portfolios* video (5:08 mins).
View PDA details	Click the PDA link (ID) to view details regarding the patron-driven acquisition.
Created by	Displays the name of the staff user who created the portfolio.
Updated by	Displays the name of the staff user who updated the portfolio last.
Authentication note	Specify any note related to authentication (to be displayed in the discovery system).
Public note	Use this note option to provide information about the database to patrons. (The note is displayed in the discovery system.)
Internal description	Use this note option to provide information to staff users. (The note is displayed only to staff.)
Linking Information tab:	
Parser (Service Level)	(Electronic Collection only) Displays the destination service specified for the electronic collection.

Table 44. Electronic Portfolio Editor Page

Field	Description
Service Parser Parameters	(Electronic Collection only) Displays the linking/access information for the service.
Parser Parameters	(Electronic Collection only) Displays the linking/access information for this portfolio.
Parser Parameters (override)	(Electronic Collection only) Enter either the parser parameters to override the electronic collection parser parameters or enter a URL for accessing the portfolio. Example: url1=http://link.aip.org/link/? & url2=http://publish.aps.org/ & url3=http://link.aps.org/abstract/ & agg=sfx For information on library-specific parameters, see **Table 38**.
URL	(Electronic Collection only) Enter the URL for accessing the portfolio. The URL can be specified as an alternative to the Parser Parameters (override) option. (Standalone only) Displays the URL for accessing the portfolio.
URL (override)	This URL overrides the URL created based on the parameters taken from the electronic collection, service, and portfolio. Example: http://link.aip.org/link/?
Proxy enabled	Specify whether a proxy has been enabled (**Yes**/**No**). Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding proxy relationships among portfolios, electronic collections, and services.
Proxy selected	Select a proxy profile option from the drop-down list. If you specified **Yes** for **Proxy enabled**, you need to identify which proxy profile is to be used for authentication (of users outside the library's network) to access the online database you have created. Refer to the **Resolver Proxies** section in the *Alma Integrations with External Systems Guide* for information regarding how to create a proxy profile.
Test access	Use this button to test access to the resource.

Table 44. Electronic Portfolio Editor Page

Field	Description
Coverage Information tab:	
Which coverage statement will be applied?	Newly activated resources come with a global coverage statement that you can accept entirely (ONLY global), select portions from based on your institution's preferences (ONLY local), or require a BOTH/AND or an OR/EITHER presence of coverage. Specify the coverage statement within an electronic collection: ■ ONLY local: Fulltext will be displayed if the issue date of the article is included in the local coverage added to the portfolios. ■ global AND local: Fulltext will be displayed if the issue date of the article is included in the local coverage added to the portfolios AND in the coverage defined in the CKB. ■ global OR local: Fulltext will be displayed if the issue date of the article is included EITHER in the local coverage added to the portfolios OR in the coverage defined in the CKB. ■ ONLY global: Fulltext will be displayed if the issue date of the article is included in the coverage defined in the CKB.
Coverage Information tab - Date Information section: (Standalone only)	
From Year	Enter the coverage parameters that indicate the content that was purchased/activated. These parameters affect service resolution (such as Primo). Coverage is displayed in the repository search results. For example, if the resource is available from 1980, enter **1980** in the **From Year** field.
Until Year	
From Volume	
Until Volume	
From Issue	
Until Issue	

Table 44. Electronic Portfolio Editor Page

Field	Description
Coverage Information tab - Date Information (override) section:	
From Year	See the description above.
Until Year	
From Volume	
Until Volume	
From Issue	
Until Issue	
Coverage Information tab - Embargo/Rolling Year section (Standalone only)	
Operator	Provides a moving wall of availability. Enter these details to match the specifics of your portfolio. For example, if the portoflio is available from 1980, but the last five years are not available, enter **1980** in the F**rom Year** (as indicated above), select **Greater than** from the **Operator** drop-down list, and enter **5** in the **Number of Years** box.
Number of Years	
Number of Months	
Coverage Information tab - Embargo/Rolling Year (override) section:	
Operator	See the description above.
Number of Years	
Number of Months	
Notes tab:	
Note	Use this option to enter a staff note regarding the portfolio.
Group Settings tab (for collaborative network and multicampus institutions):	
Refer to **Adding Group Settings to Electronic Resources** on page 280 that describes group settings for electronic collections, electronic services, and electronic portfolios.	

Table 44. Electronic Portfolio Editor Page

Field	Description
History tab:	
	The History tab displays a list of changes related to the electronic portfolio. For each change that is saved, the following information is shown on the History tab: ■ Dates of the change ■ Operator that made the change ■ Name of the field that was changed ■ Old (previous) value ■ New value For fields/columns that are blank or empty, a dash displays in the History tab columns. You can use the **Find** function to locate a specific change. Click the icon next to the ID in the **Operator** column to view the following details about the operator in the pop-up window that opens: ■ Name ■ Primary identifier ■ Home address ■ Office address ■ Email ■ Telephone **VIDEO:** For more information about the History tab, refer to the *History Tab for Electronic Resources* video (4:26 mins).

4 Click **Save** to save your changes to the portfolio.

To relink a portfolio to a different bibliographic record:

1 Using Repository Search, locate the portfolio that you want to relink and open it in the Electronic Portfolio Editor.

2 Click the **Relink to Another Bibliographic Record** button.

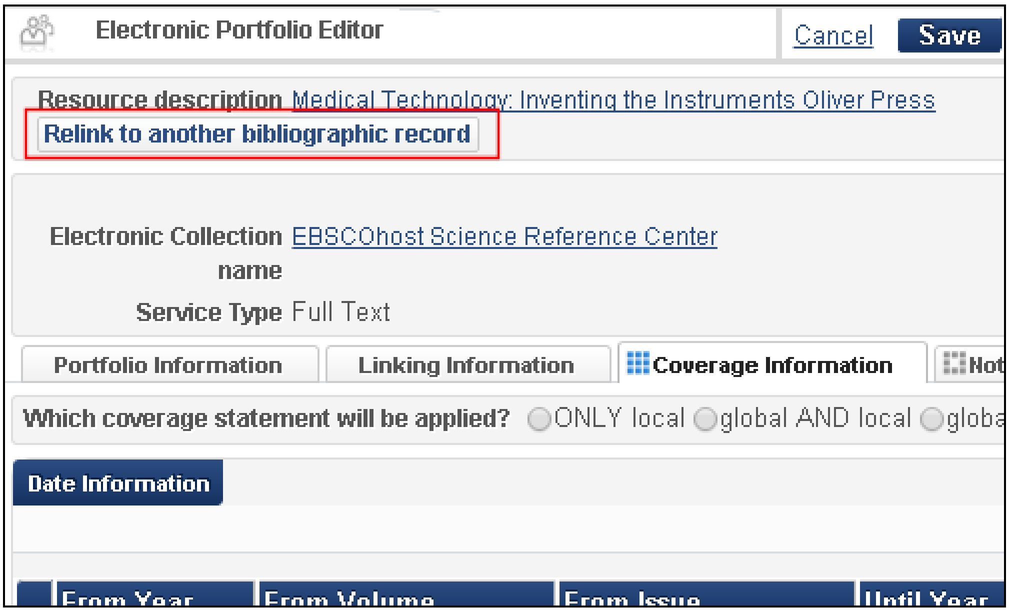


Figure 244: Relink to Another Bibliographic Record

The Relink Confirmation dialog box opens.

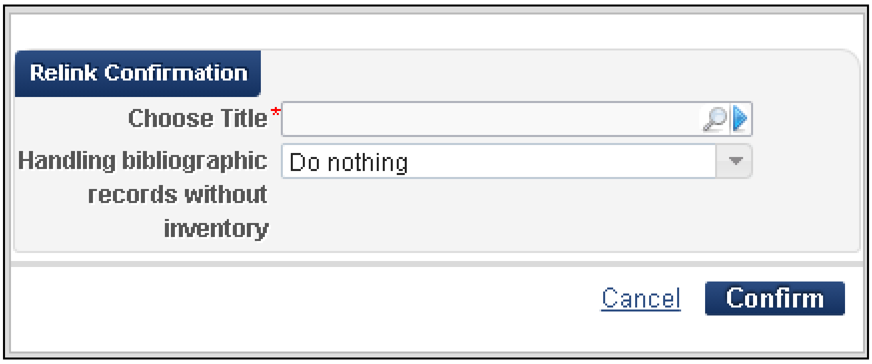


Figure 245: Relink Confirmation Dialog Box

3. Browse for the bibliographic record to which you want to relink the portfolio.

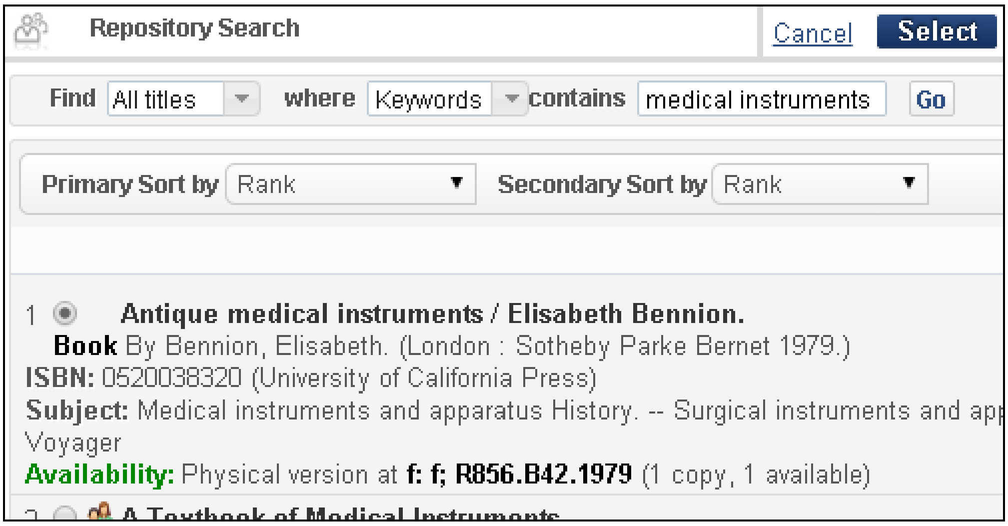


Figure 246: Identify Bibliographic Record for Relinking

4 Select the bibliographic record to which you want to relink and click **Select**.

The Relink Confirmation dialog box opens with the selected title displayed.

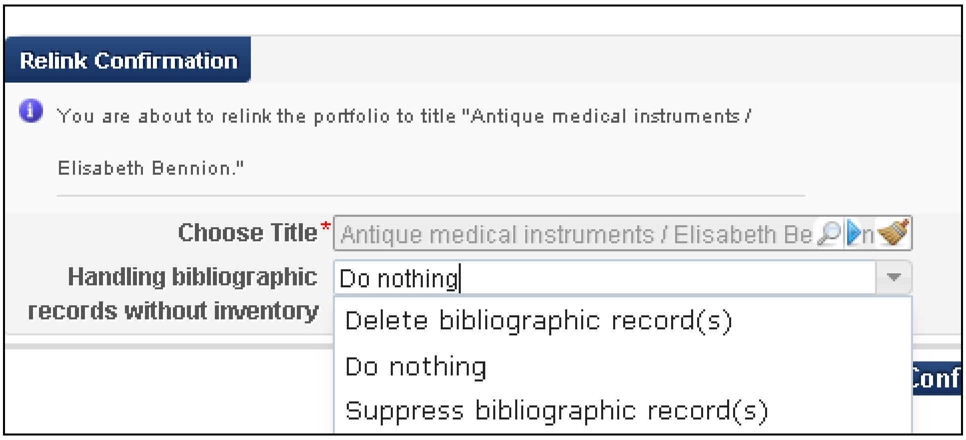


Figure 247: Selected Title Displays

5 Select one of the following options for **Handling bibliographic records without inventory**:

- **Delete bibliographic record(s)**
- **Do nothing**
- **Suppress bibliographic record(s)**

With these options, you can now indicate how you want to handle the unlinked bibliographic record.

6 Click **Confirm**.

The system processes your relinking request and displays the Electronic Portfolio Editor page with the updated **Resource description** and a successfully linked message.

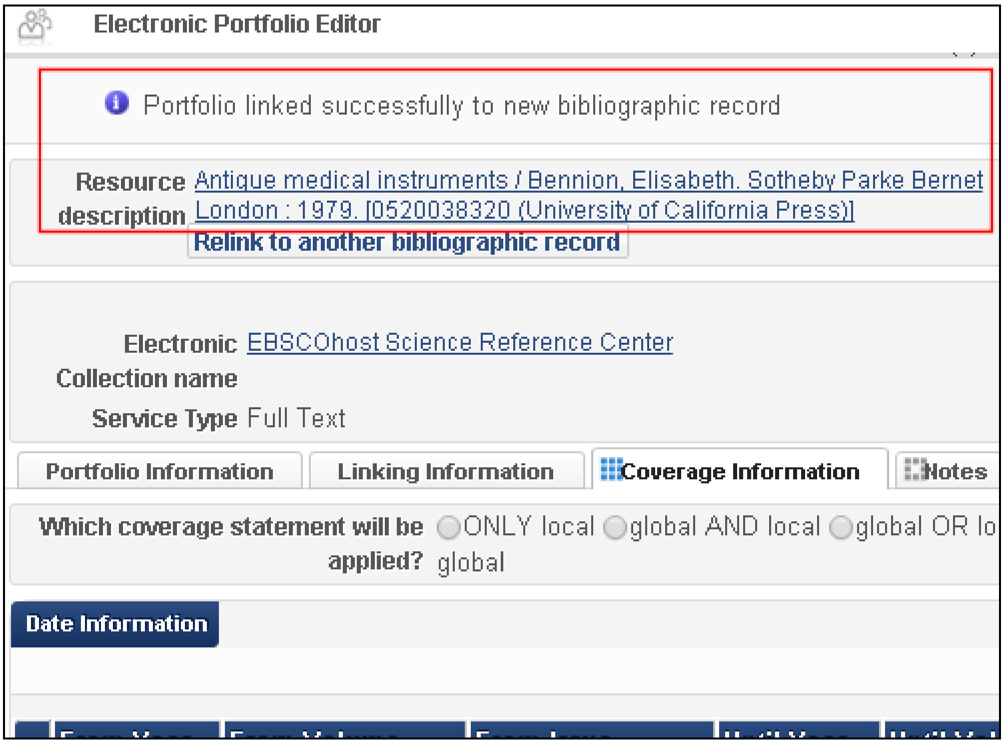


Figure 248: New Resource Description for Relinked Portfolio

To link a standalone portfolio to an electronic collection (from the Electronic Portfolio Editor):

1 Using Repository Search, locate the standalone portfolio that you want to link to an electronic collection and open it in the Electronic Portfolio Editor.

(Hint: Use the **Is Standalone** electronic portfolio search option in Advanced Search.)

2 Click **Attach to a Collection**.

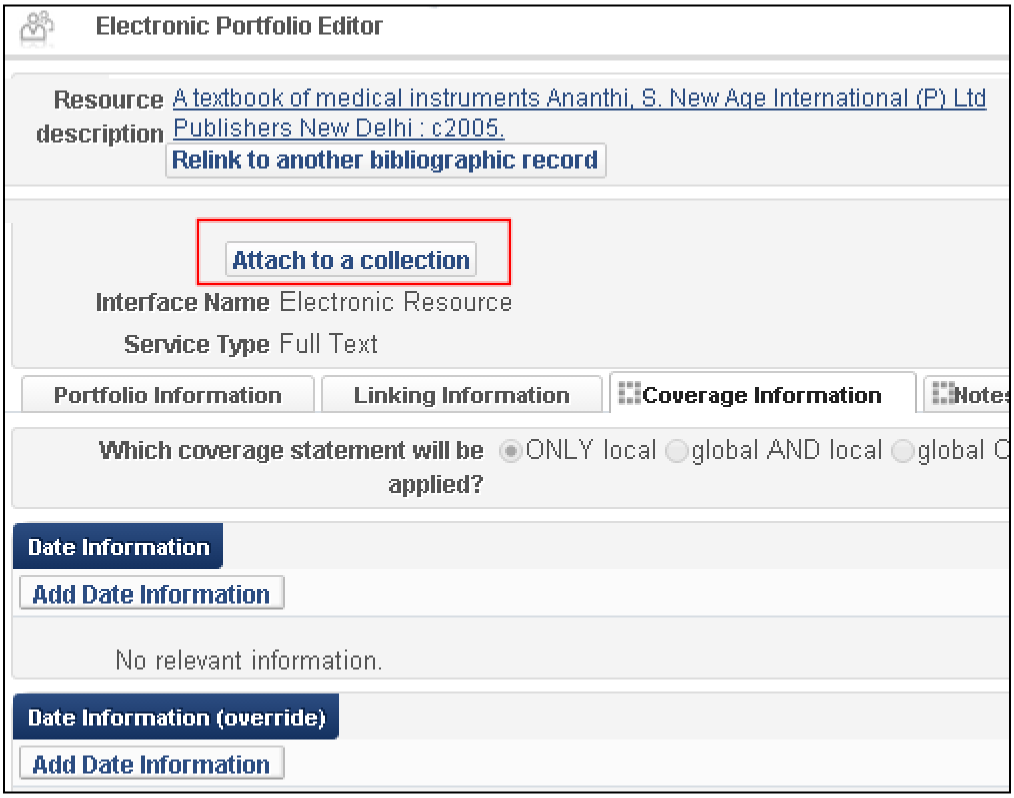


Figure 249: Attach to a Collection Button

The Select a Collection and Service dialog box opens.

Figure 250: Select Electronic Collection and Service for the Standalone Portfolio

3 Browse to select the electronic collection to which you want to add the portfolio. The **Find** drop-down list is limited to the **Electronic Collection** option.

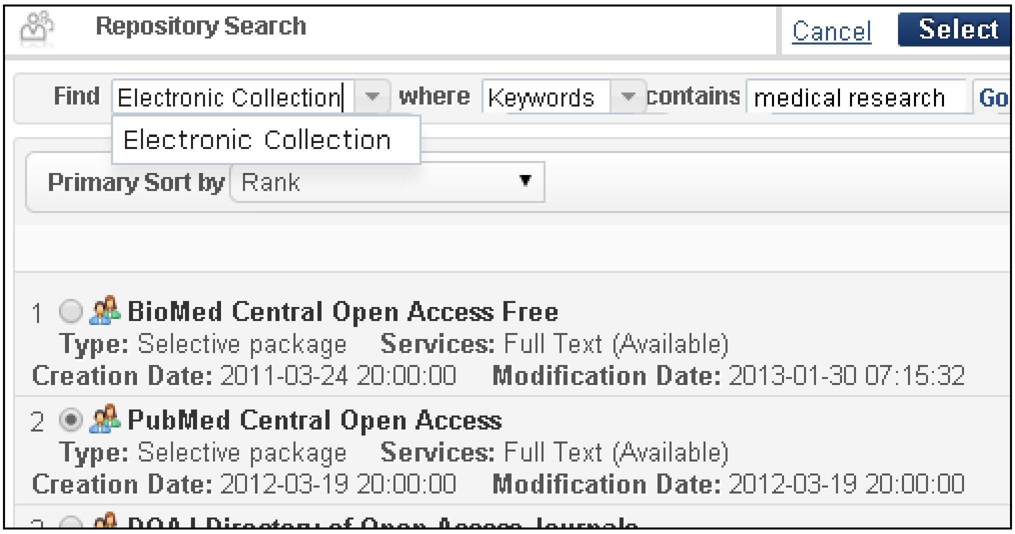


Figure 251: Browse for Electronic Collection

4 Identify the electronic collection to which you want to add the portfolio and click **Select**.

5 In the Select a Collection and Service dialog box, select the type of service and click **Confirm**.

The system processes your change and displays *The portfolio successfully attached to …* message to confirm its successful completion. The Electronic Portfolio Editor page updates to display the electronic collection to which the portfolio has been added and the service type that was selected.

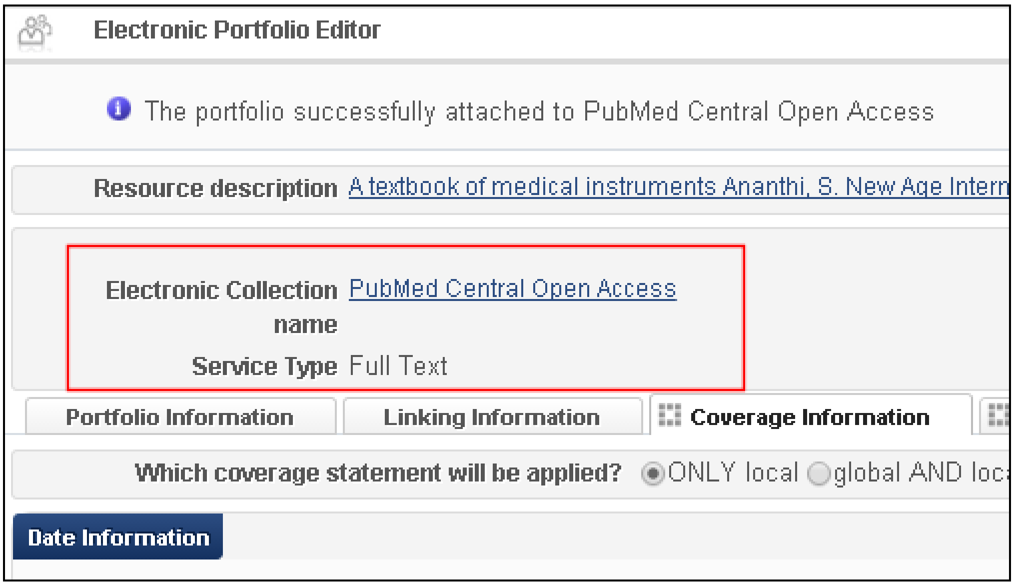


Figure 252: Electronic Collection and Service Type Selected

Modifying a Portfolio in an Electronic Collection Using the Electronic Service Editor

Alma provides the flexibility to manage your work with electronic portfolios on an individual level or as part of a collection. This section describes modifying a portfolio that is part of a collection using the Electronic Service Editor.

To modify a portfolio in an electronic collection using the Electronic Service Editor:

1. Complete a search for an electronic collection.
2. Click **Edit Service** for a specific collection.

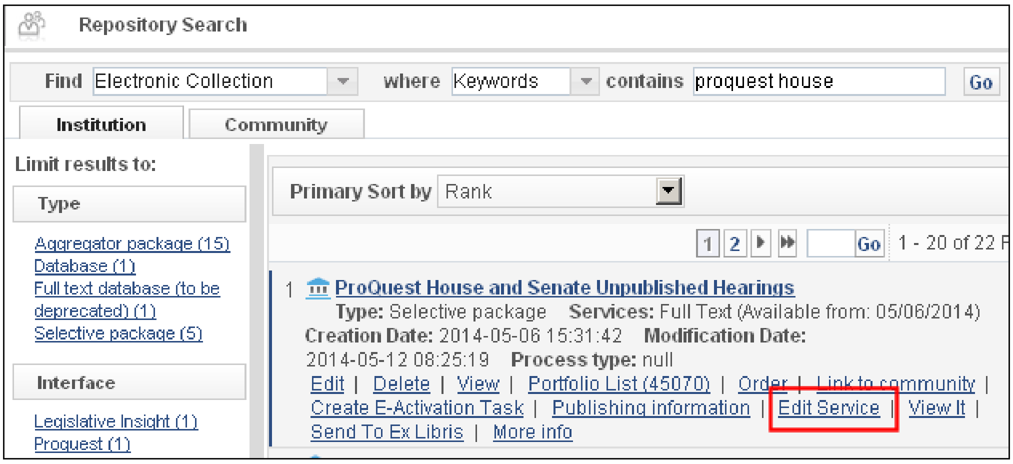


Figure 253: Edit Service Link

The Electronic Service Editor opens to the Activation Information tab.

3 Select the **Portfolios** tab.

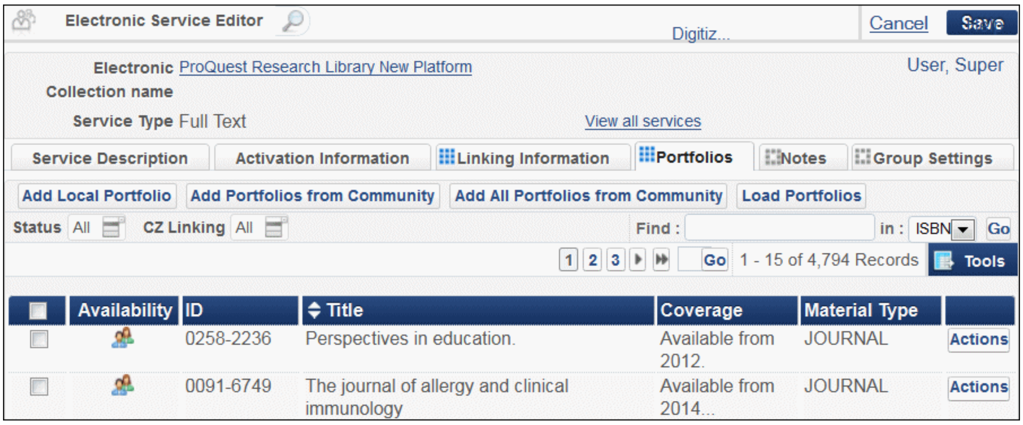


Figure 254: Electronic Service Editor Portfolios Tab

The Portfolios tab opens. In addition to the information here, you can see other services and related electronic resources by clicking the **View all services** link above the tabs. This opens the Electronic Collection Editor page that contains the total number of portfolios, how many of the portfolios are active, and the active from/until dates by service type (see below).

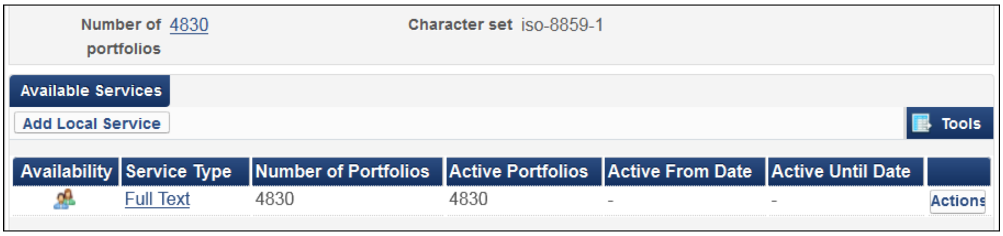


Figure 255: Additional Portfolio Information (Accessed from the **View all services** link)

4. In the row of the portfolio that you want to edit, select **Actions > Edit.**
5. To complete your edits, see **Modifying a Portfolio Using the Electronic Portfolio Editor** on page **349**.

Adding Multiple Electronic Resources to a PO Line Using the Electronic Portfolio Editor

You can associate multiple electronic resources with the same PO line using the relevant Electronic Resource Editor. For portfolios, use the Electronic Portfolio Editor.

NOTE:

The following is an example of adding multiple electronic resources to a PO line for a portfolio. Similarly, this capability also applies to electronic collections of all types.

To add multiple electronic resources to a PO line using the Electronic Portfolio Editor:

1 Identify/locate the PO line number to which you want to add an electronic resource. For example, PO line POL-63922 (see below):

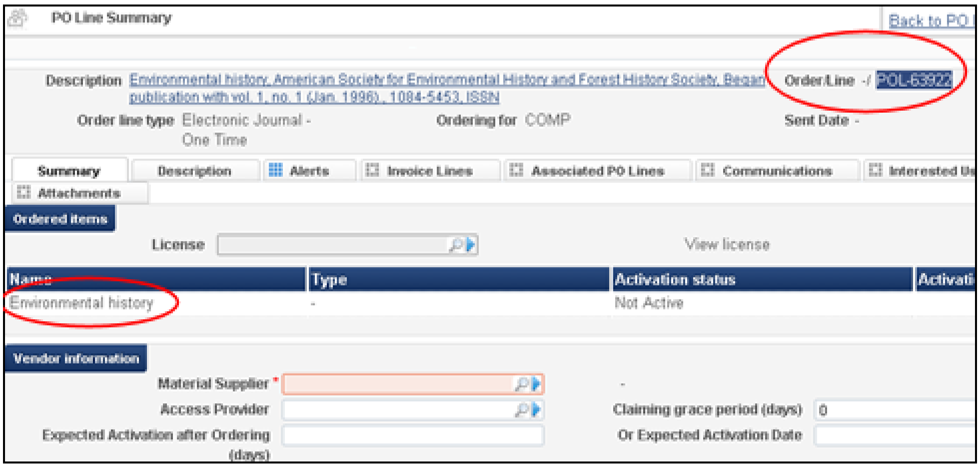


Figure 256: PO Line Number Example

2 In the Portfolio Information tab on the Electronic Portfolio Editor page (**Resource Management > Repository Search),** select **Electronic Portfolio, enter your search criteria, and click Edit for the electronic resource that you want to add to the PO line**. Enter the PO line number that you identified in the previous step to connect the electronic resource that you are editing to the existing PO line, and select the PO line that openss. The system dynamically updates the PO line details.

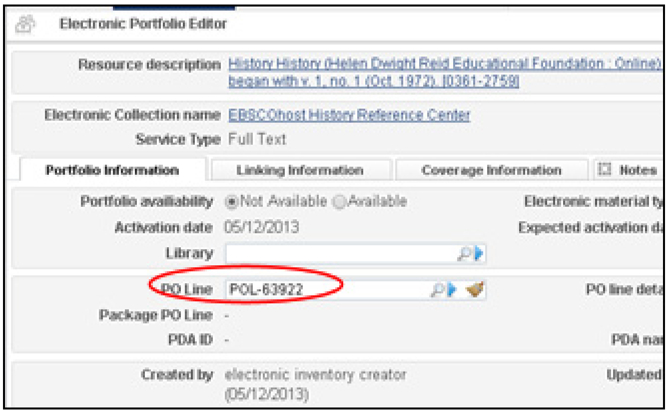


Figure 257: Enter PO Line Number

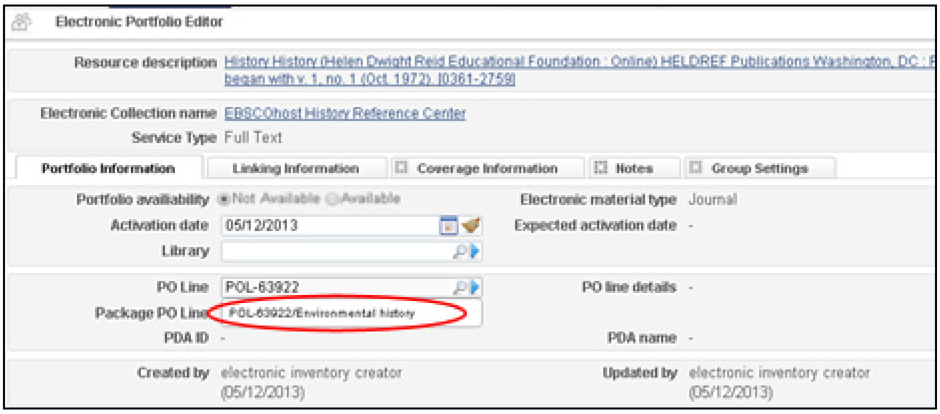


Figure 258: Select the PO Line Listed

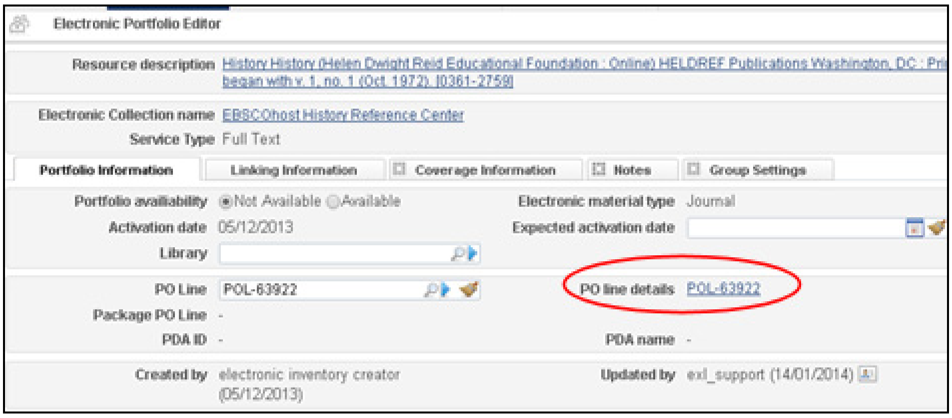


Figure 259: PO Line Details Dynamically Updated

3 Click **Save**. The system displays a successfully updated confirmation message.

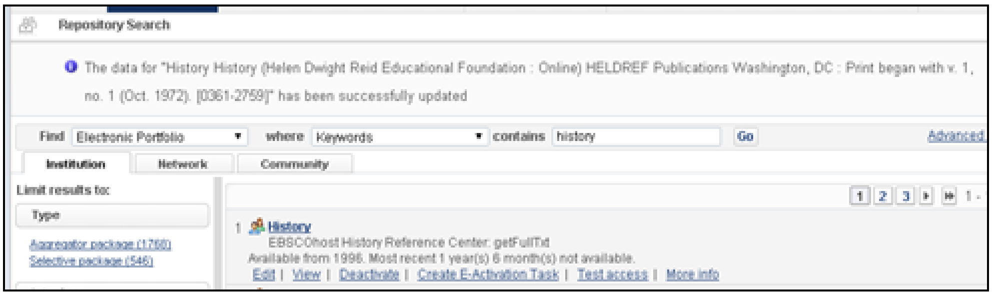


Figure 260: Save/Update Confirmation Message

Performing Global Changes on Portfolios

Alma allows inventory operators to make global changes to portfolios that have been added to a set. Alma supports the following types of global changes to portfolios:

- Remove local coverage
- Set a proxy
- Update URLs (such as removing the EZproxy prefix, for example)
- Associate portfolios with a license
- Activate/deactivate portfolios
- Delete portfolios (with the appropriate permissions)

  For information on using a job to delete portfolios, see **Deleting Portfolios** on page **372**.

Previously, global changes could be made only by using the portfolio loader for electronic collections.

To perform global changes on portfolios:

1. From the Alma main menu > Use the **Information Update** filter on the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job** and filter on **Type=Information Update**).
2. Select the **Change electronic Portfolio information** job.

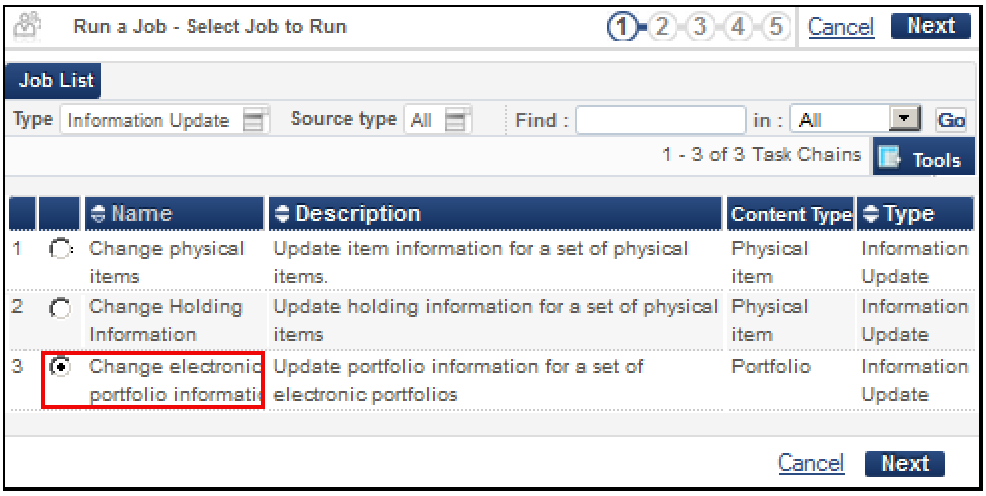


Figure 261: Select Job to Run

3. Click **Next** and select the set to process. For information on sets, see **Adding and Modifying Sets** on page **84**.
4. Click **Next** to enter task parameters.

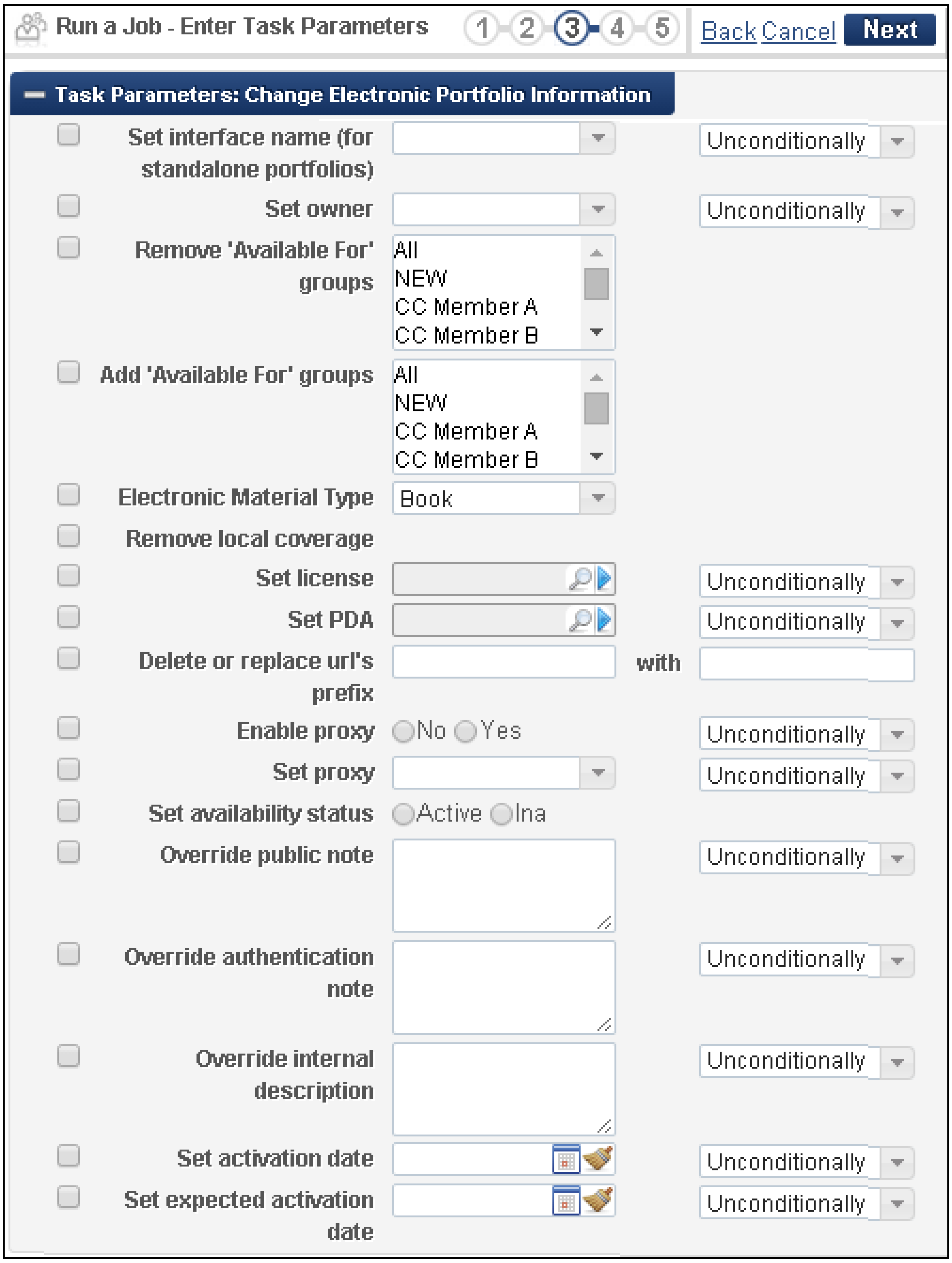


Figure 262: Enter Task Parameters

5. Select the check boxes to match your criteria. See the table below for a description of each parameter that is applied to the set of records selected in Step 2 of the wizard.

   For each parameter in the table below, select one of the following conditions from the associated drop-down list:

- **Unconditionally** – The system will always perform the change to the field.
- **If field empty** – The system will perform the change only when the field has no value.
- **If field not empty** – The system will perform the change only when the field has a value.

Table 45. Change Electronic Portfolio Task Parameters

Parameter	Description
Set Interface Name (for standalone portfolios)	Select the vendor interface name from the drop-down list. **NOTE:** This parameter applies to standalone portfolios.
Set Owner	Select the owning library from the drop-down list.
Remove Available For Groups	Use this parameter to remove the Available For Group setting in the set of records that you selected in Step 2 of the wizard. Use click, Shift+click, or Ctrl+click to select the Available For Group(s) to remove. **NOTE:** This parameter is specific to collaborative network or multicampus institutions.
Add Available For Groups	Use this parameter to add the Available For Group setting in the set of records that you selected in Step 2 of the wizard. Use click, Shift+click, or Ctrl+click to select the Available For Group(s) to add. **NOTE:** This parameter is specific to collaborative network or multicampus institutions. **VIDEO:** Refer to *Assign Available For Groups to a Set of Portfolios Using a Job* for a detailed description of running a batch job which assigns Available For groups to a set of electronic portfolios, allowing quick handling of many portfolios in a single job (7:03 mins).

Table 45. Change Electronic Portfolio Task Parameters

Parameter	Description
Electronic Material Type	Use this parameter to identify a specific material type such as Book, Database, Dissertation, Musical Score, Streaming Video Your selection for this option is applied to the set of records that you selected in Step 2 or the wizard.
Remove Local Coverage	Select this option to remove all types (date information/ embargo) of local coverage to the set of records that you selected in Step 2 of the wizard.
Set License	Select the license from the drop-down list. This license setting is applied to the set of records you selected in Step 2 of the wizard.
Set PDA	Use this option to associate migrated electronic books to a PDA program without the extra steps of recreating the PDA program from the beginning for those resources. Click the **Browse** icon to display the Patron Driven Acquisition List page and select a PDA from the list to assign to the set of electronic portfolios. To assign a single portfolio to a PDA, you can use the Electronic Portfolio Editor. Refer to the procedure **To modify an electronic portfolio:** on page 350 for more information.
Delete or replace URL's prefix/with	Specify the prefix to remove or replace in the first (left) field. If you are replacing the URL prefix, enter the new value in the **with** field at the right.
Enable Proxy	Select **Yes** or **No** from the drop-down list.
Set Proxy	If you specified **Yes** for **Enable Proxy**, select the proxy profile from the drop-down list.
Set Available Status	Specify **Active** or **Inactive**.
Override Public Note	Enter a free-form text note that is applied to the set of records that you selected in Step 2 of the wizard. This note displays for patrons.
Override Authentication Note	Use this parameter to update the authentication note for the set of records that you selected in Step 2 of the wizard.
Override Internal Description	Use this parameter to update the internal description (that displays for staff users) in the set of records that you selected in Step 2 of the wizard.
Set Activation Date	Use this parameter to define the activation date for the set of records that you selected in Step 2 of the wizard.

Table 45. Change Electronic Portfolio Task Parameters

Parameter	Description
Set Expected Activation Date	Use this parameter to identify the expected activation date for the set of records you selected in Step 2 of the wizard.

6 Click **Next**, specify the job name, and select the schedule for the job.

7 Click **Next**, review your job specifications (example below), and click **Save** if everything is specified correctly.

Figure 263: Review and Confirm Page

8 Click **Save**.

Deleting Portfolios

Alma allows users with the role Electronic Inventory Operator Extended to delete portfolios by performing the **Delete portfolios** job on a set of portfolios.

NOTE:

When a portfolio is deleted, electronic resource activation tasks associated with the portfolio are also deleted.

To delete portfolios by running a job:

1 On the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Withdraw** to filter the list.

2 Select the **Delete portfolios** job and click **Next**.

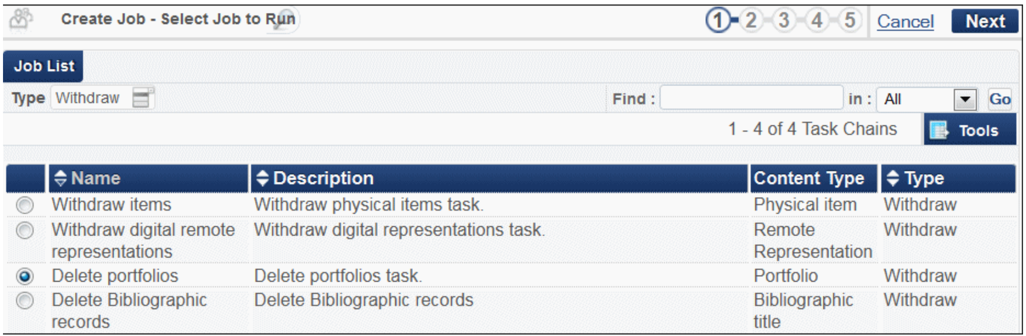


Figure 264: Delete Portfolios job

3 Select the set of portfolios to be deleted (that was previously saved using the repository search) and click **Next**.

The Run a Job – Enter Task Parameters page displays the parameters for the **Delete portfolios** job.

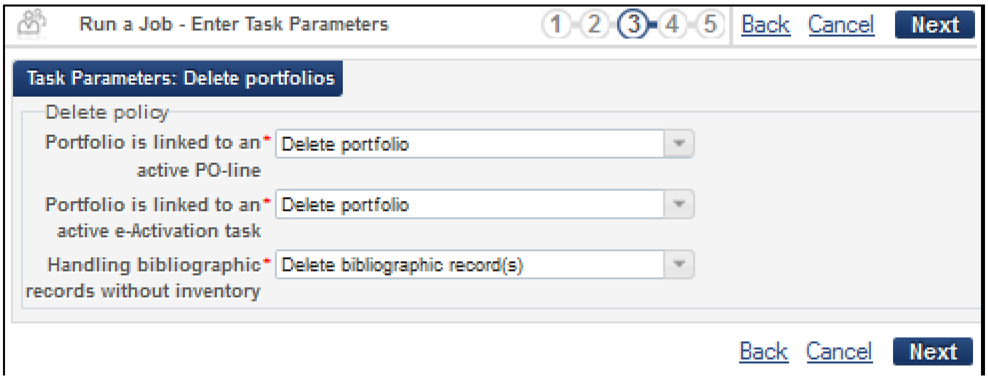


Figure 265: Delete Portfolio Parameters

4 Select from the following parameters and click **Next**.

- Portfolio is linked to an active PO line
  - Delete portfolio
  - Skip
- Portfolio is linked to an active e-Activation task
  - Delete portfolio
  - Skip
- How to handle childless bibliographic record?
  - Delete bibliographic record
  - Do nothing
  - Suppress bibliographic record

5 Enter a job name, select the scheduling option, and click **Next**.

The Run a Job – Review and Confirm page opens.

6 Review the job selections that you have made; if they are correct, click **Save**.

To manually delete a local standalone portfolio:

HINT:
The Electronic Inventory Operator Extended role is required for delete operations.

1 Locate the portfolio that you want to delete using repository search.

2 Click the **Delete** link and click **Next**.

Figure 266: Delete Link

The **Delete confirmation** pop-up window displays.

Figure 267: Delete Confirmation

3 Select the **Handling bibliographic records without inventory** option that you prefer and click **Confirm**.

A successful deletion message displays when processing is complete.

Figure 268: Successful Deletion Message

To manually delete a local portfolio that is part of a local or CZ electronic collection:

HINT:
The Electronic Inventory Operator Extended role is required for delete operations.

1 Locate the portfolio that you want to delete using repository search.

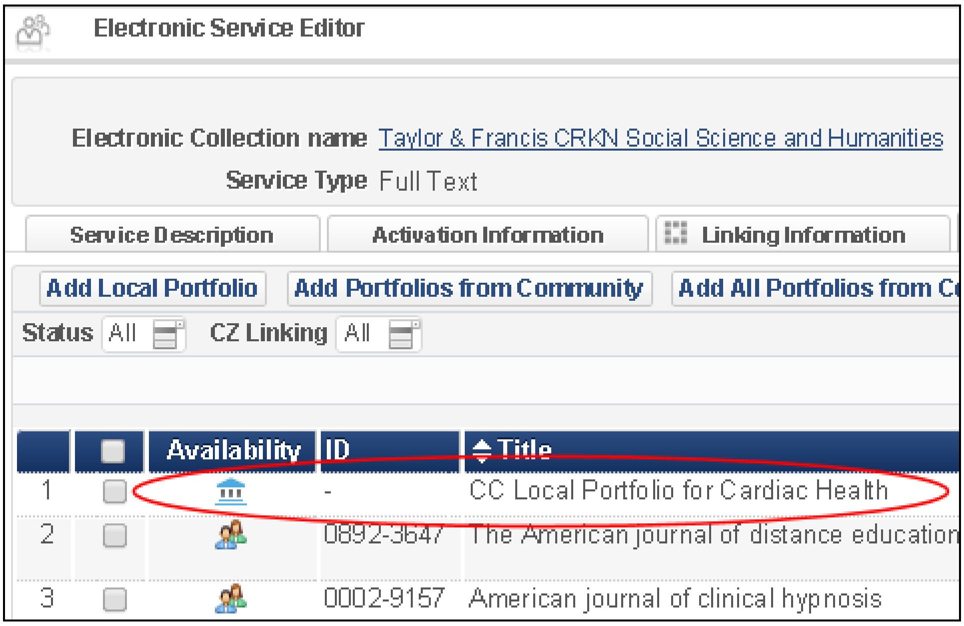


Figure 269: Local Portfolio to be Deleted

2 Click **Actions > Delete**.

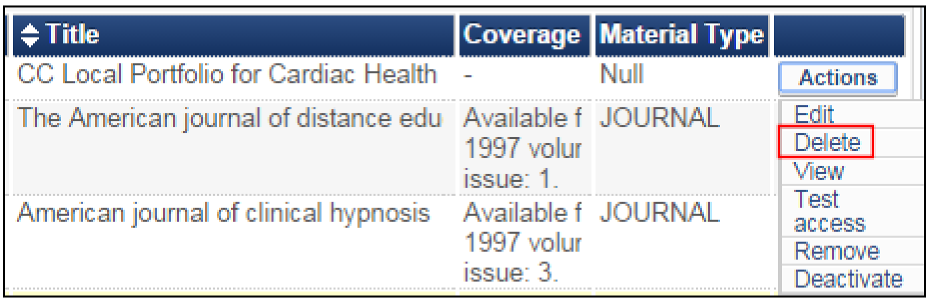


Figure 270: Actions > Delete

The **Delete confirmation** pop-up window displays.

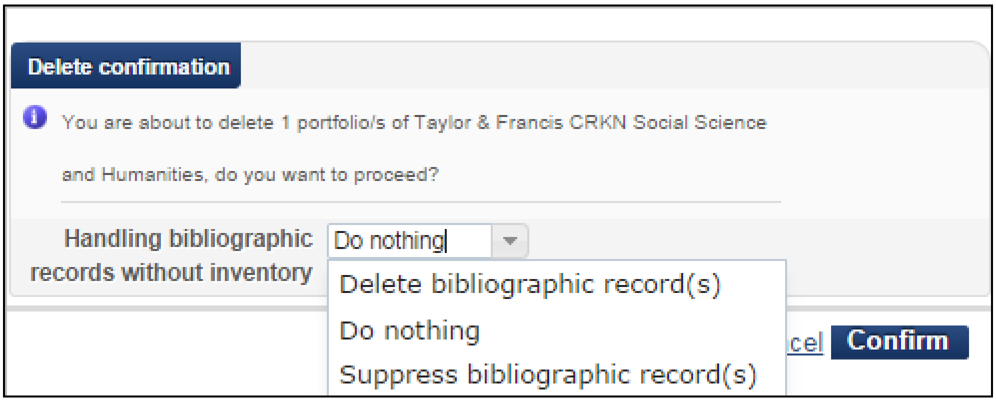


Figure 271: Delete Confirmation

3 Select the **Handling bibliographic records without inventory** option that you prefer and click **Confirm**.

When processing is complete, Alma displays a deleted confirmation message.

Figure 272: Successful Deletion Message

Linking a Local Portfolio to the CZ When the Portfolio is Part of a CZ-Linked Service/Electronic Collection

Alma provides the capability to link local portfolios that are part of a CZ-linked electronic collection to the CZ. This provides the benefits of CZ updates to the electronic portfolios that you link to the CZ.

This capability is implemented with the **Link Local Portfolios to Community** option (refer to the procedure below) for portfolios in the Electronic Service Editor. As part of this implementation, the system automatically executes a job to process your linking request to the CZ and provides a report of the results through **Monitor Jobs** (**Administration > Manage Jobs**).

Refer to **Linking a Local Electronic Collection to the Community Zone** on page 320 for related information.

To link local portfolios to the CZ from the Electronic Service Editor page when the portfolios are part of a CZ-linked service/electronic collection:

1. Locate the CZ-linked electronic collection that contains the local portfolios you want to link to the CZ.

Figure 273: Electronic Collection Search Results

2. Click **Edit Service** for the electronic collection containing the local portfolio that you want to link to the CZ. The Electronic Service Editor page opens.
3. Select the **Portfolios** tab.

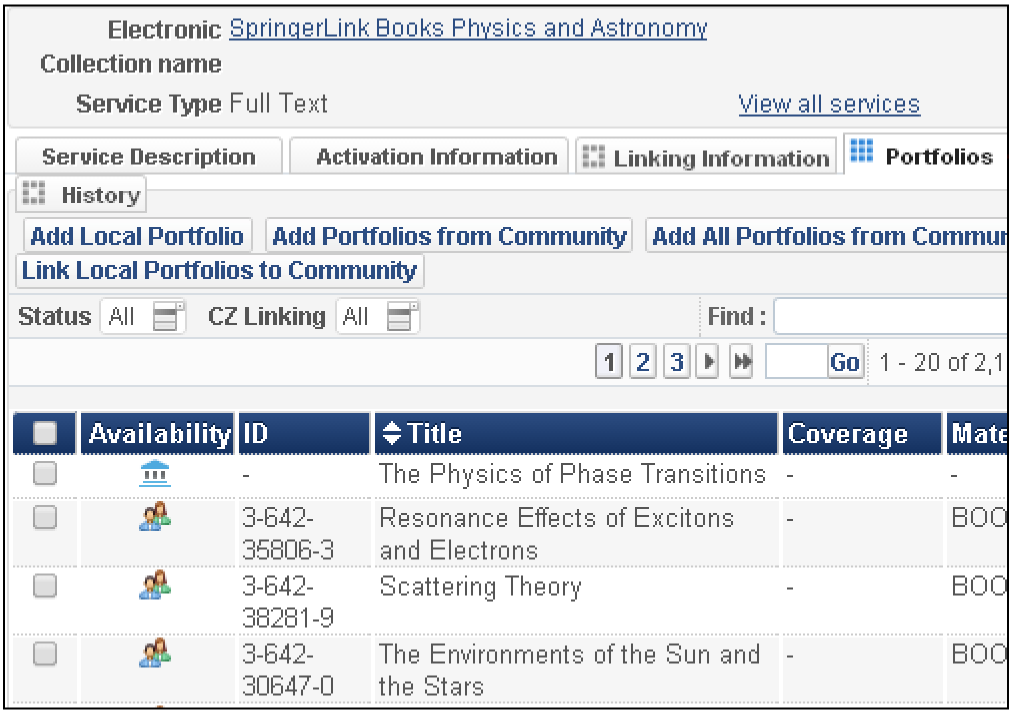


Figure 274: Portfolios Tab

4. Click **Link Local Portfolios to Community**.

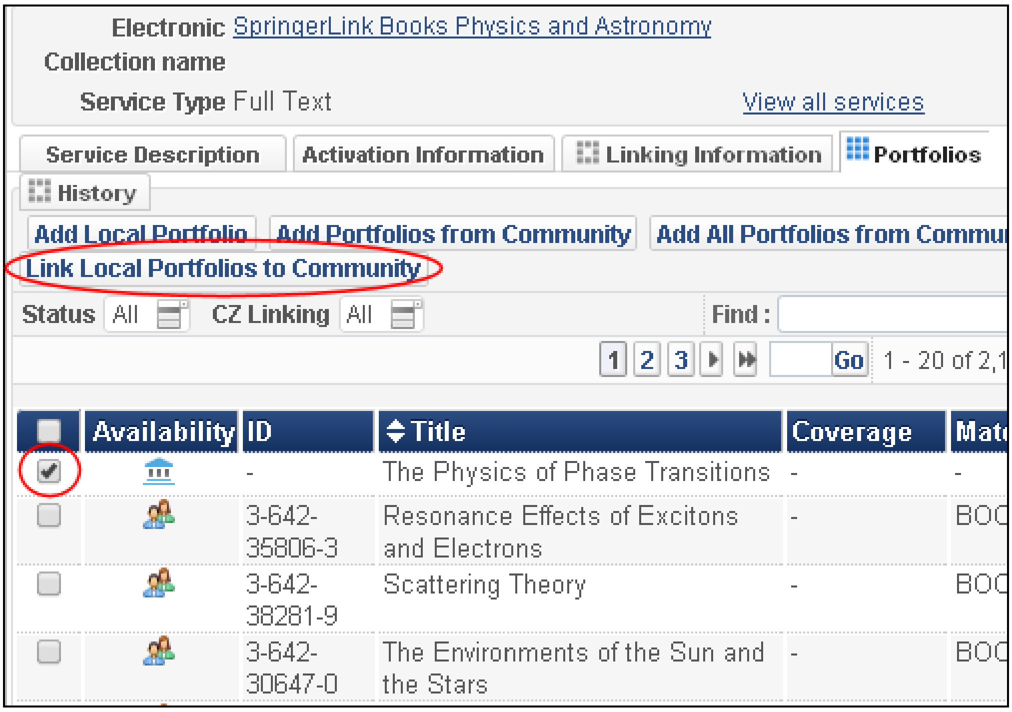


Figure 275: Select Local Portfolio and Link to CZ

The Link Electronic Resources to Community page opens.

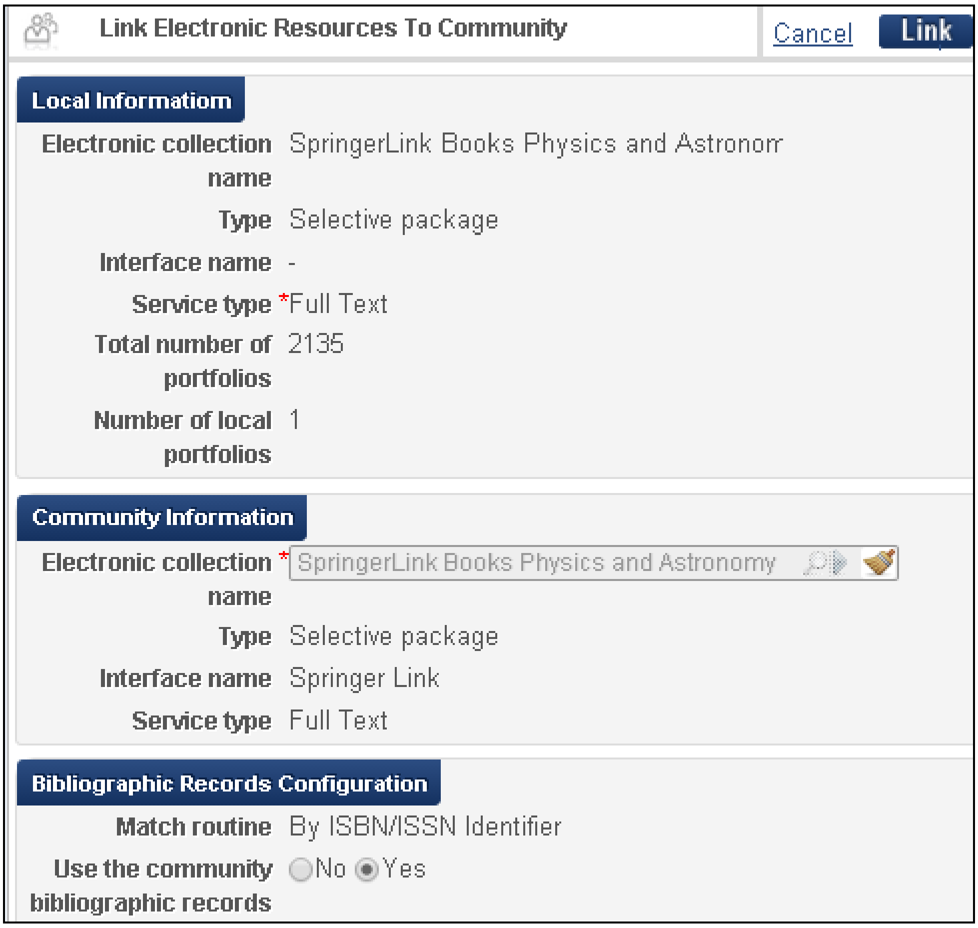


Figure 276: Link Electronic Resources to Community Page

5 In the Bibliographic Records Configuration section, select **Yes** or **No** for the **Use the community bibliographic records** option and click **Link**. The system displays a pop-up dialog box with a summary/warning of the linking actions.

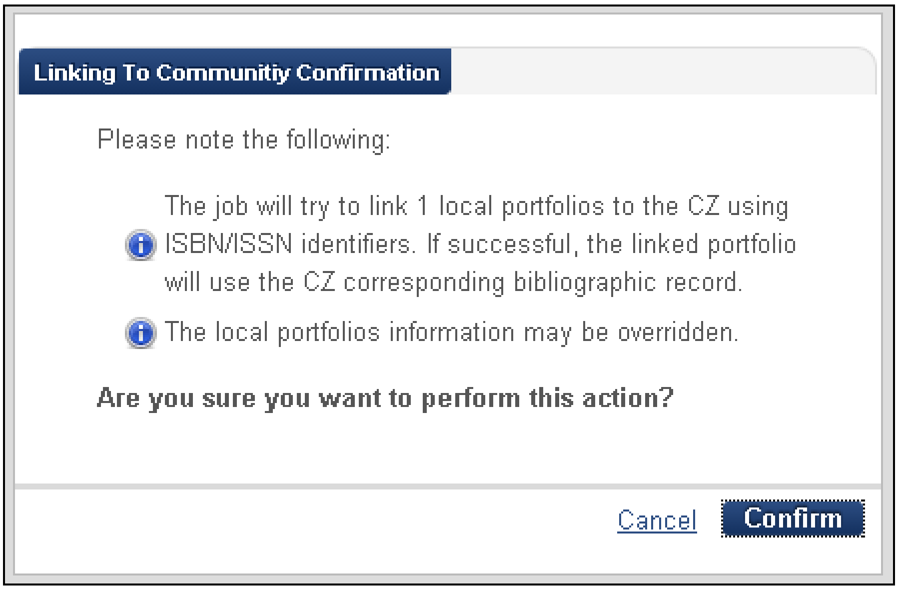


Figure 277: Linking Summary/Warning

6 Review the information that is provided and if everything is acceptable, click **Confirm**. The link electronic resources job successfully submitted message displays on the Electronic Service Editor page.

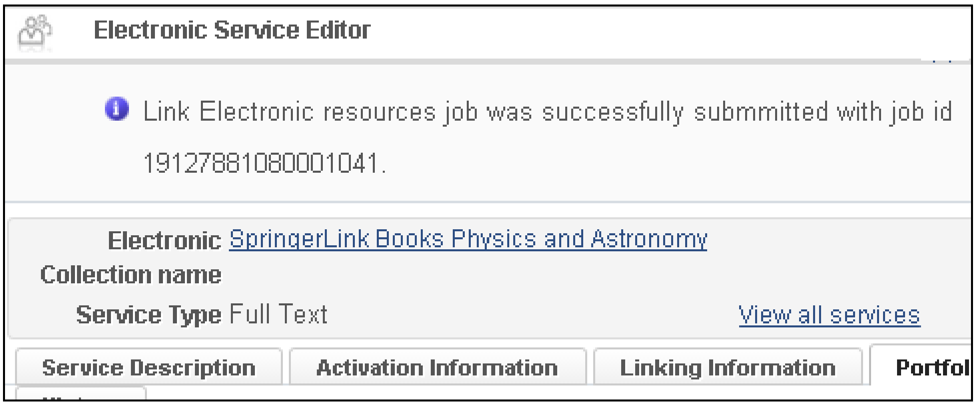


Figure 278: Successfully Submitted Message

7 Check the Job Monitor to review the status of your linking job.

a Open the **Monitor Jobs** page (**Administration > Manage Jobs**).

b Select the **Completed** tab.

c Locate the **Link local electronic resources to the Community Zone job**.

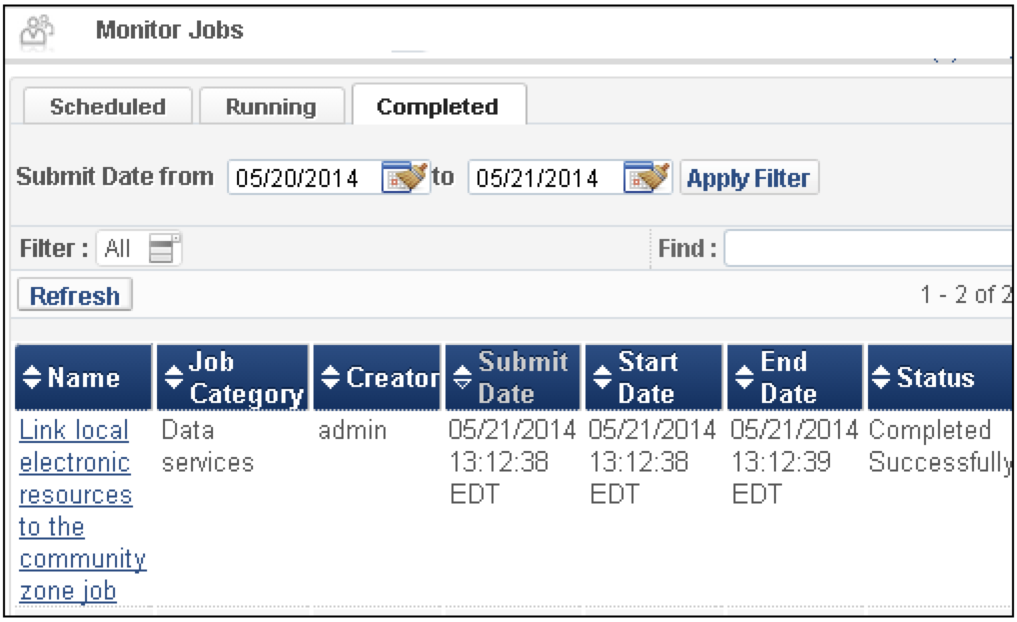


Figure 279: Linking Job on the Completed Tab

d Select **Actions > Report** or click the **Link local electronic resources to the Community Zone job** link in the Name column to display the job report.

Figure 280: Linking Job Report

8 Confirm your linking results.

a Search for the electronic collection containing the portfolio that you linked to the CZ and click **Edit Service** for that collection.

b Select the **Portfolios** tab.

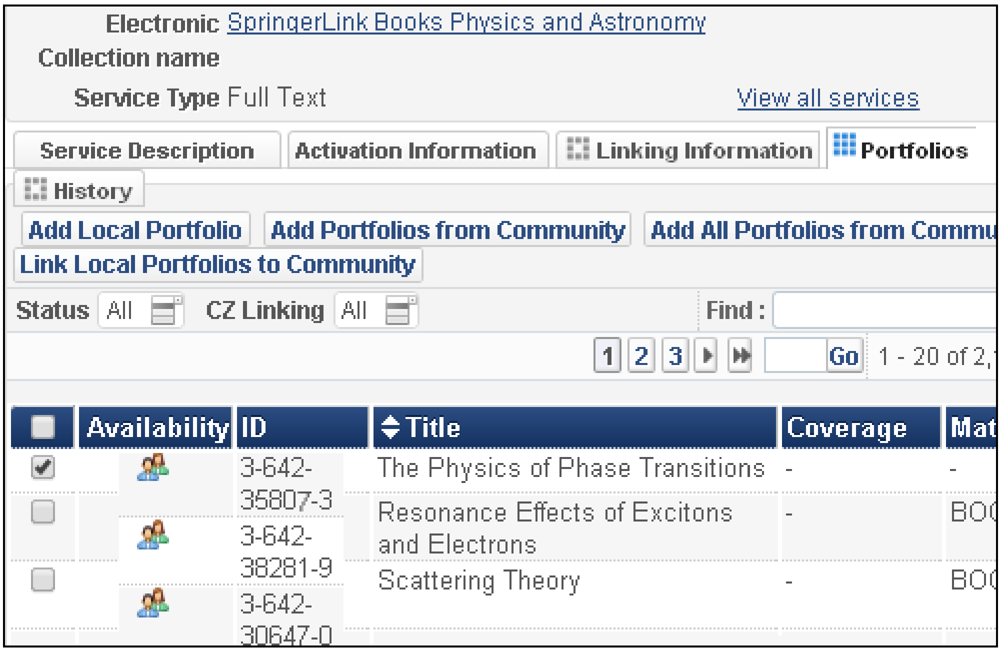


Figure 281: Confirm CZ Link

Associating a License at the Portfolio Level

Alma is able to associate license information with individual portfolios that are part of an electronic collection. With the appropriate role, you can access the options to specify a license for an individual portfolio; or when one is not specified at the portfolio level, the system associates the electronic collection license (when one has been identified for the electronic collection) with the portfolio.

In addition to the capability provided in the Electronic Portfolio Editor to support this feature, the following related options also provide support for this feature:

- More info

  The number of licenses displays in the **More info** dialog box (refer to **Using the Portfolios List** on page 73 for additional information). Click the license number link to display the details of the license information.

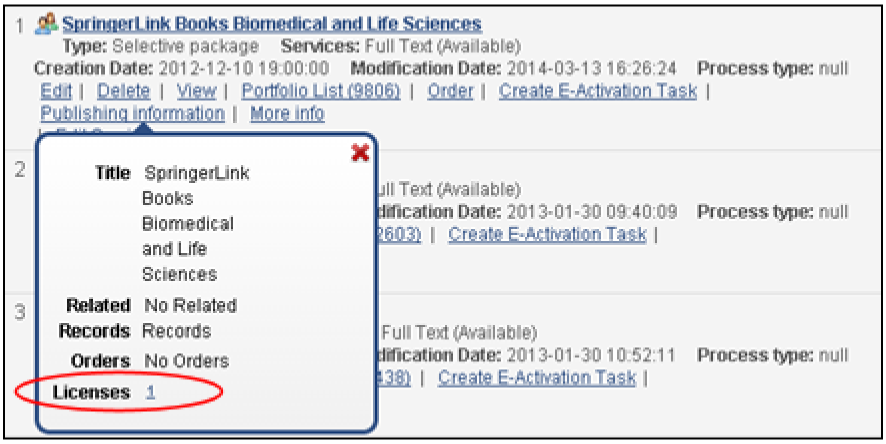


Figure 282: More Info License Information

NOTE:

For an electronic collection, the **More info** licenses number represents the number of different licenses related to the electronic collection. This includes the license associated with the electronic collection and the different licenses that may be associated with the portfolios within the collection.

- View It/Alma Resolver Show license link

  When you use the **View It** link to display a resource's information using Alma Resolver, the **Show (Hide) license** link on the Alma Resolver page displays the license information defined at the portfolio level.

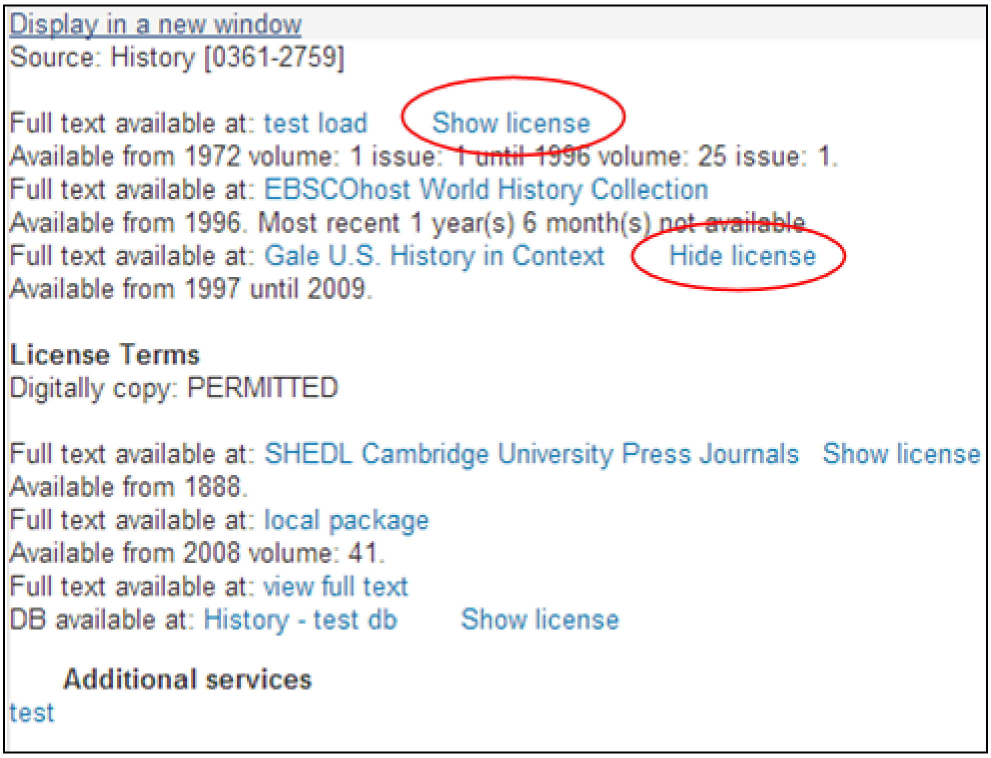


Figure 283: Alma Resolver Show (Hide) License Link

- Acquisitions license details Inventory tab

  In Acquisitions, the filter in the Active Resources section and the History of Resources section of the Inventory tab for license details provides filter options for both electronic collections and portfolios. The Resource Type column displays the electronic collection or portfolio information in the Inventory tab.

  For related information, refer to **Managing Licenses and Amendments** in the *Alma Acquisitions Guide*.

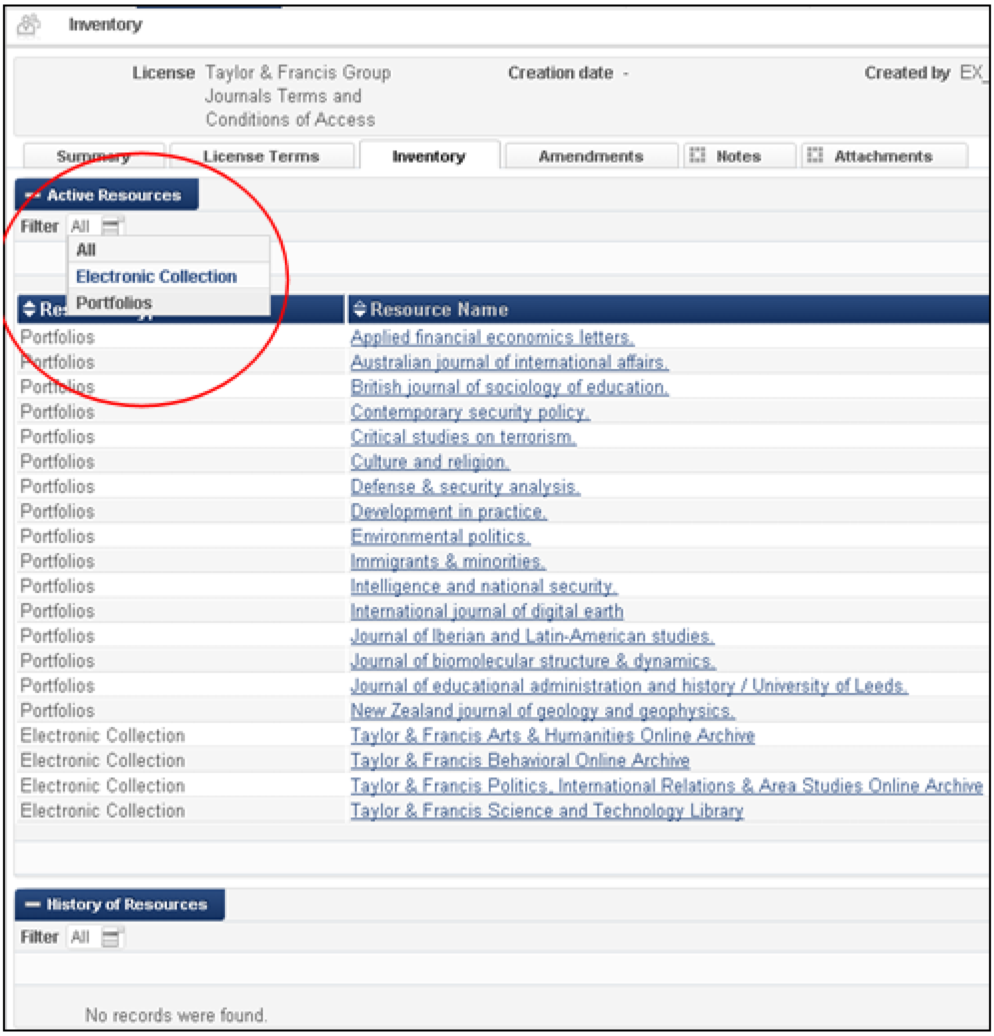


Figure 284: Active Resources Section Filter

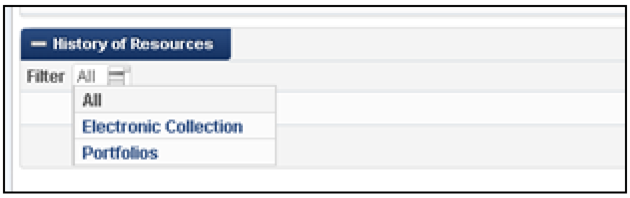


Figure 285: History of Resources Section Filter

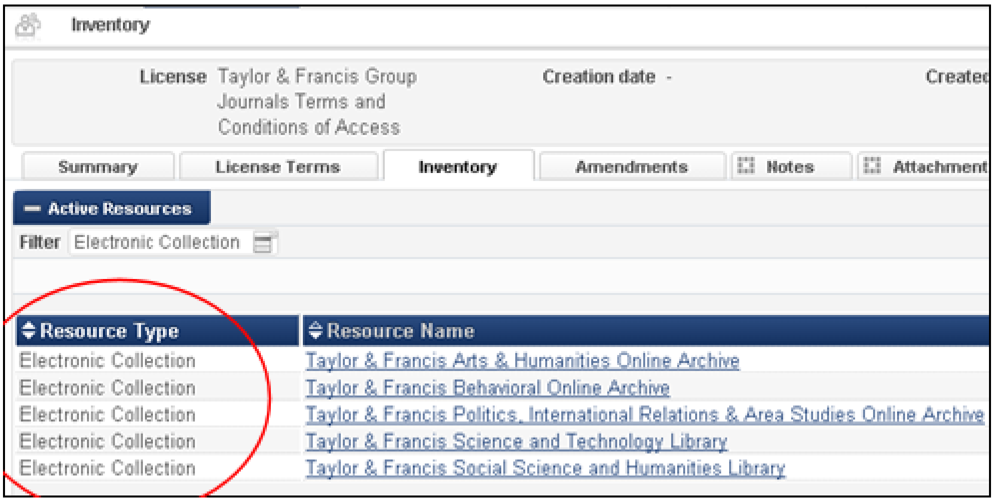


Figure 286: Resource Type Column

VIDEO:

For more information about manageing licenses, see the *Manage License of an Electronic Portfolio* video (2:47 mins).

To associate a license to an individual portfolio that is part of an electronic collection:

1 Locate the electronic collection that contains the portfolio to which you want to add license information. For this example, note the number of Licenses identified in the **More info** pop-up dialog box, and click **Edit** to view the license information for the SpringerLink Books Biomedical and Life Sciences electronic collection (that displays in the General Information tab).

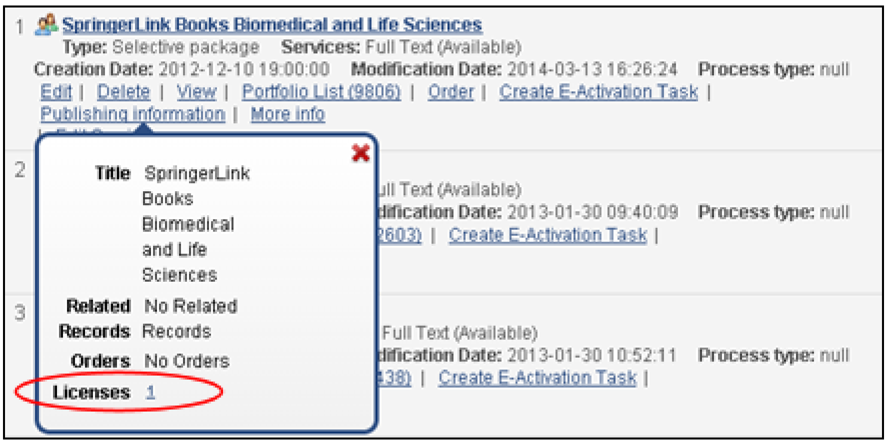


Figure 287: Note Licenses for the Example

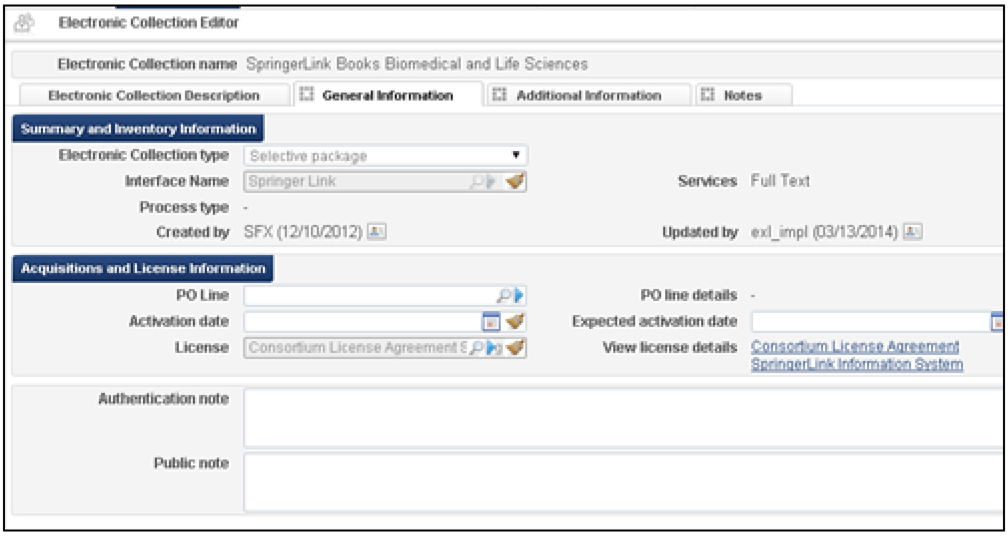


Figure 288: General Information Tab

2. From your search results, click the **Portfolio List <number of portfolios>** link (for this example, the SpringerLink Books Biomedical and Life Sciences electronic collection). The list of portfolios displays for the SpringerLink Books Biomedical and Life Sciences electronic collection.

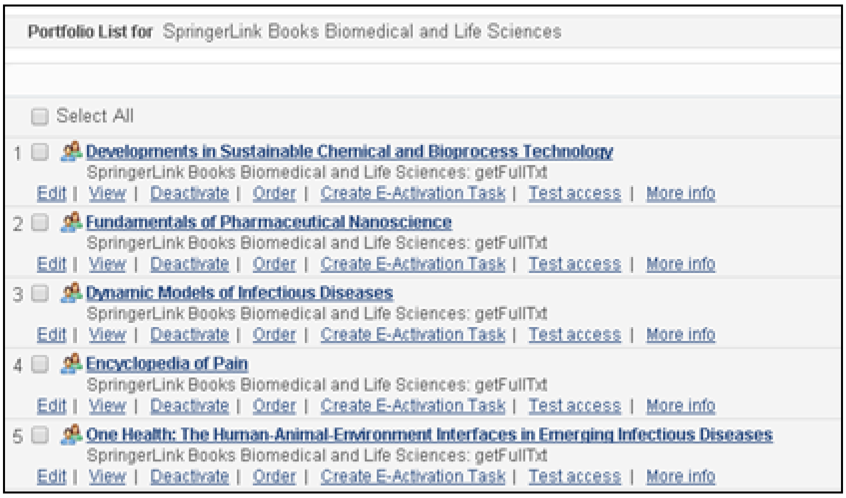


Figure 289: Portfolio List Example

3. Click **Edit** for the portfolio to which you want to assign a different license. The Coverage Information tab on the Electronic Portfolio Editor page opens.

4. Select the **Portfolio Information** tab.

5 Browse (from the License field) to locate the license that you want to assign to this portfolio (different from the license for the electronic collection in which this portfolio is a member).

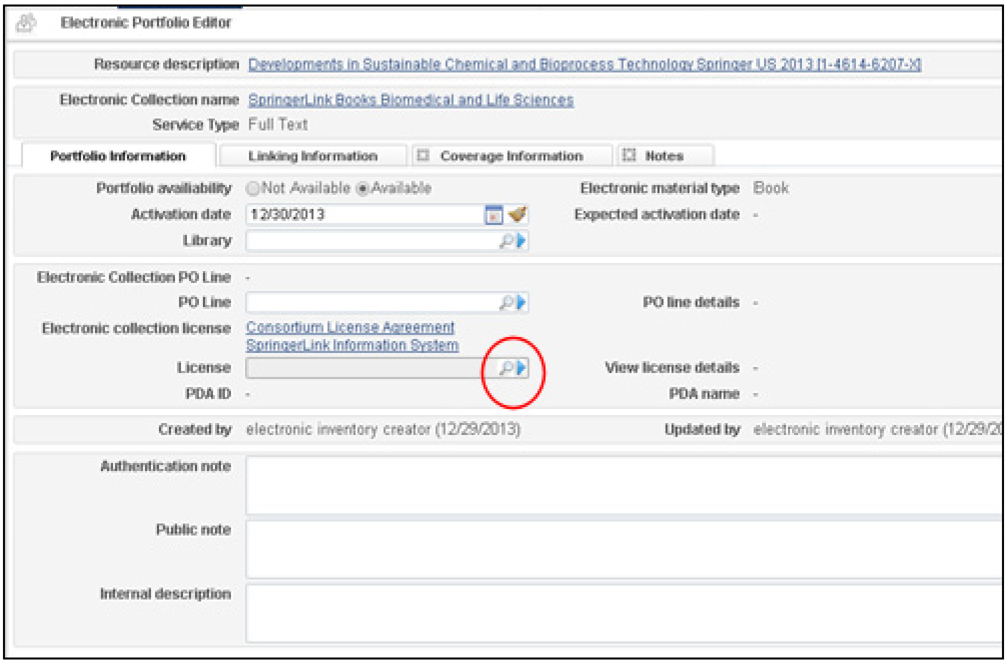


Figure 290: Browse for License

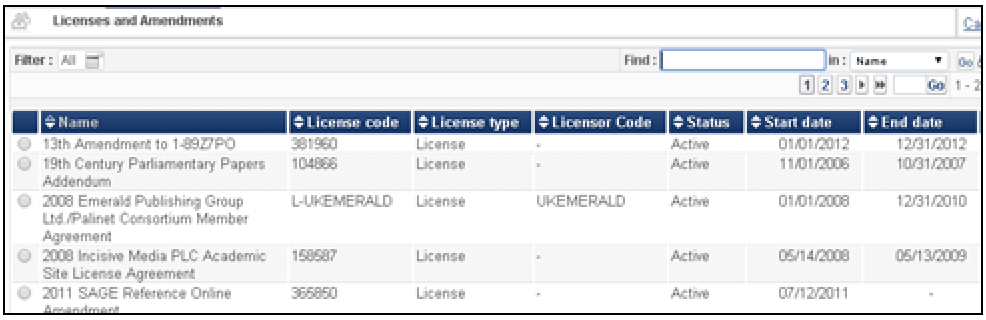


Figure 291: Licenses and Amendments Page/Options

NOTE:
Use the Find option to narrow the list of licenses displayed.

6 Select the radio button next to the license to be assigned to the portfolio and click **Select**.

Figure 292: Select License

The new license information displays in the license field in the Portfolio Information tab on the Electronic Portfolio Editor page.

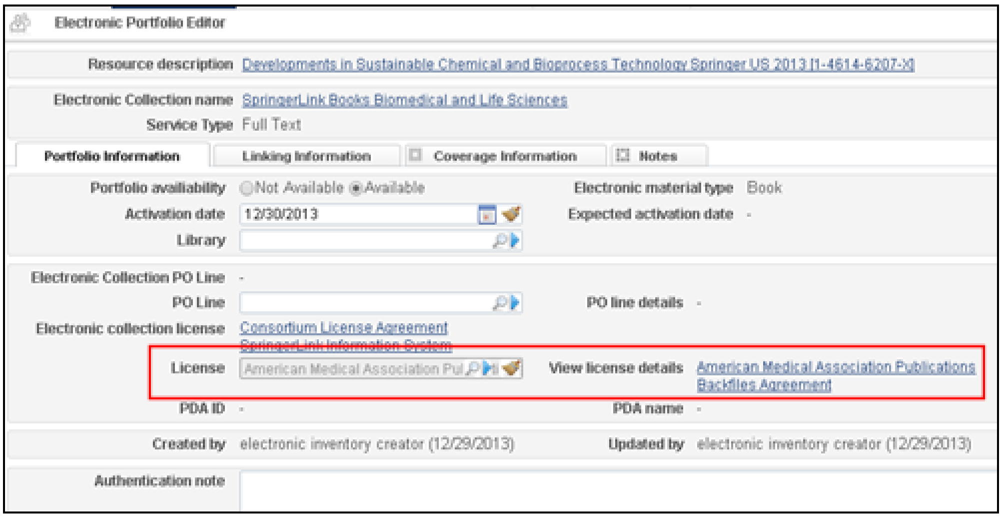


Figure 293: Portfolio License Information Selected

7 Click **Save**. The system returns you to the list of portfolios page for the SpringerLink Books Biomedical and Life Sciences electronic collection with a confirmation message indicating that the portfolio record was successfully updated (with the new license information).

Figure 294: List of Portfolios

8 Click the **More info** link. It now displays 2 for Licenses instead of 1.

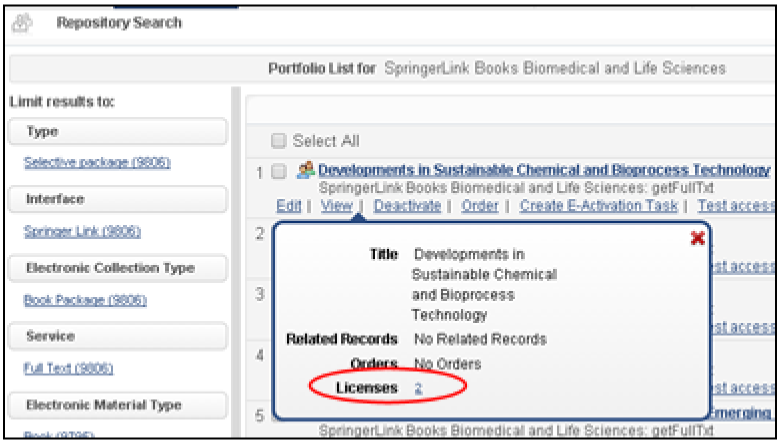


Figure 295: Licenses Updated to 2

Activating Electronic Resources

PERMISSIONS:

To manage electronic resource activation, you must have the following roles:

- Electronic Inventory Operator or Repository Manager
- Electronic Inventory Operator Extended (required for delete operations)

Activation of electronic resources begins when you receive an electronic material delivery. A resource awaiting activation can be one of the following types:

- Electronic collection – Requires completion of the Activation Wizard before the resource is activated
- Portfolio – Requires only a confirmation that the resource can be activated

For details on managing electronic resource activation, see:

- **Managing Electronic Resource Activation** on page **395**
- **Using the Activation Wizard** on page **406**

The workflow for receiving electronic material is as follows:

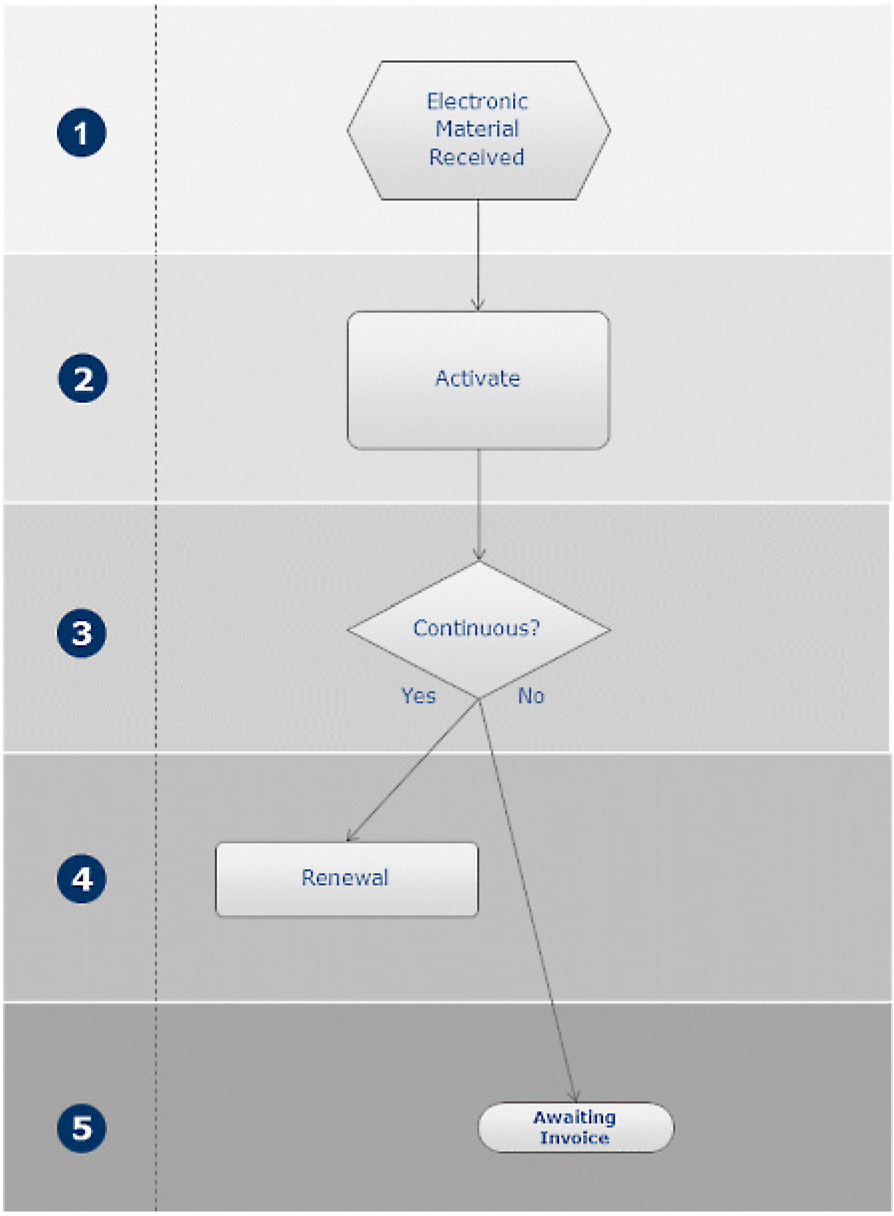


Figure 296: Receiving Electronic Material Within the Purchasing Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. The electronic material that was ordered from the vendor arrives and is processed in Alma.
2. The electronic material is activated.

3 The system checks whether the PO line type is continuous. If the type is continuous, the system proceeds to step **4**. If the type is not continuous, the system proceeds to step **5**.

4 The renewal is processed (see **Renewals** in the *Alma Acquisitions Guide*).

5 The final step in the receiving workflow is to await the invoice from the vendor or create the invoice in Alma (see **Invoicing** in the *Alma Acquisitions Guide*).

Assigned and Unassigned Electronic Resources

An electronic resource can either be **assigned** or **unassigned**.

A resource for activation is assigned to you by your supervisor. Resources that you are working on (whether pre-assigned or self-assigned) appear as review tasks in your personal task list under the heading **Electronic resources assigned to you for activation**, accessible from the **Tasks** link on the Alma home page.

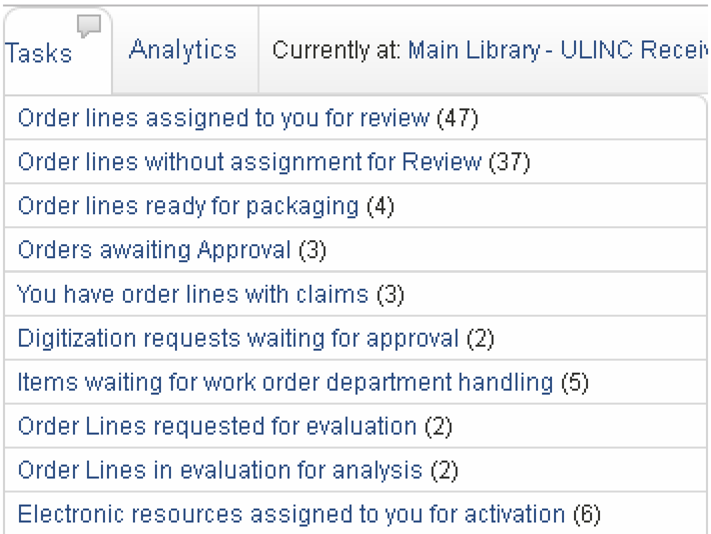


Figure 297: Link to Electronic Resources for Activation

When you click this link, the Electronic Resource Activation Task List page opens, displaying the electronic resources assigned to you for activation review in the **Assigned to Me** tab.

Only the person assigned to the electronic resource can edit the resource information. For details on assigning resources, see the relevant procedure in **Managing Electronic Resource Activation** on page 395. Purchasing managers can view the electronic resources assigned to other library staff in the **Assigned to Others** tab.

NOTE:
Electronic resources cannot be edited from the **Assigned to Others** tab.

If an electronic resource is unassigned, it is included in the number of unassigned PO lines listed in the Tasks list.

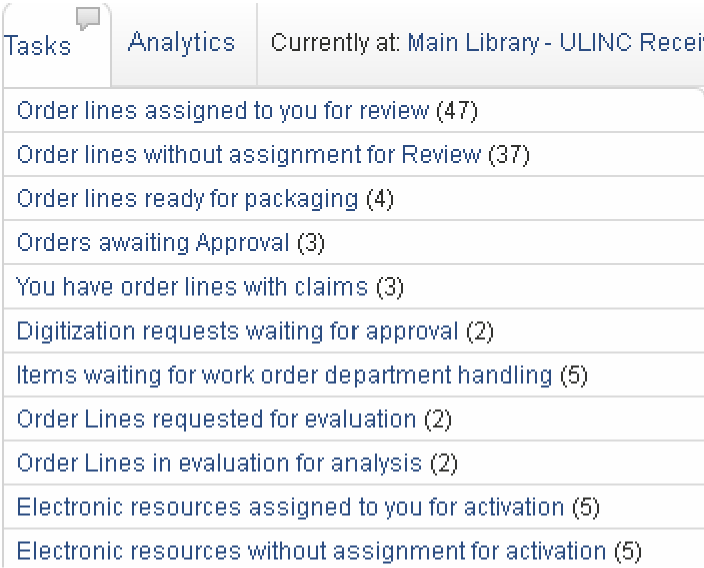


Figure 298: Link to Unassigned Electronic Resources

When you click this link, the Electronic Resource Activation Task List page opens, displaying the unassigned resources in the **Unassigned** tab.

Any staff person with review permissions is authorized to edit unassigned electronic resources.

Managing Electronic Resource Activation

After an electronic resource has been added to the inventory, there are other tasks that may need to be completed prior to making the resource visible to patrons. For example, you may want to test access to the e-resource to confirm that the access is working properly. In Alma, these tasks are handled through the options provided on the Electronic Resource Activation Task List page (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**).

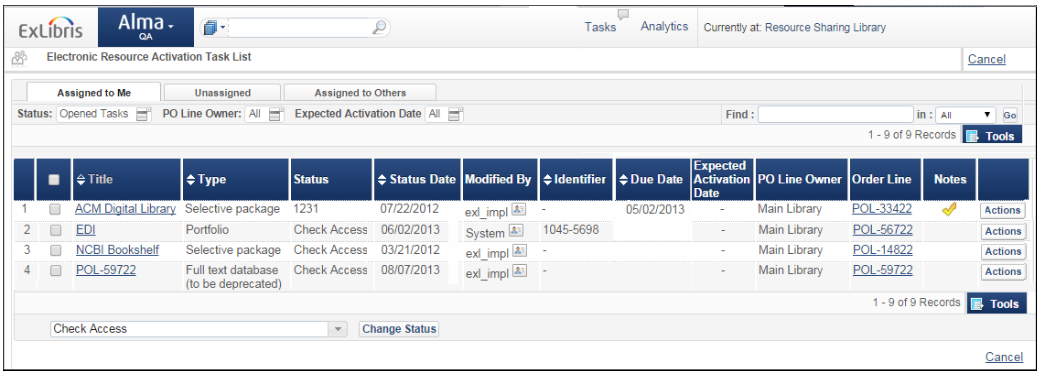


Figure 299: Electronic Resource Activation Task List Page

Electronic resources are automatically added to the Electronic Resource Activation Task List page if they are ordered from the Community Zone or Institution Zone. They are not automatically added if the **Activate** option is used from the Community Zone search results and there has been no ordering process.

In addition, resources may be added to the Electronic Resource Activation Task List page by clicking **Create E-Activation Task** from the Electronic Portfolio search results in an IZ repository search.

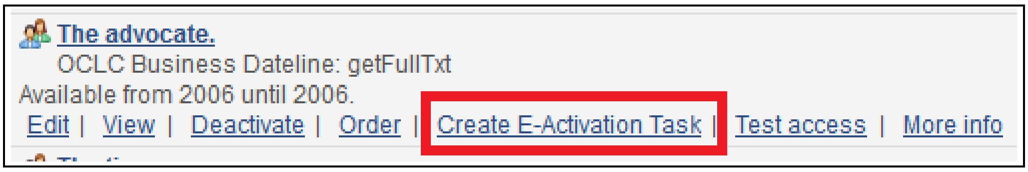


Figure 300: Create E-Activation Task Link

On the Electronic Resource Activation Task List page, you can locate specific resources using **Find** at the top of the resource list. You can select the following options from the **in** drop-down list:

- All
- PO Line
- Title
- Type

When you select the **Type** option from the **in** drop-down list, the values that you specify in the **Find** field indicate the electronic resource material type.

NOTE:

Titles without an electronic resource material type have a value of **Portfolio**. The electronic resource material type is determined when the activation task is created, and it cannot be edited. The material type manifests itself in Primo's Get It/Details tabs.

From the **Expected Activation Date** drop-down list you can filter the list according to the following options:

- **All** – All activation tasks are displayed
- **Passed** – Only the activation tasks whose activation date has passed are displayed
- **Not Passed** – Only the activation tasks whose activation date has not passed are displayed

In the **Modified By** column that displays on the Electronic Resource Activation Task List page, you can click the icon next to the user ID to view additional information about the user who modified the title.

From the Electronic Resource Activation Task List page, you can perform the row actions described in the following table.

Table 46. E-Resource Activation Action Options

Action	Description
View	Use this option to view the activation task.
Edit	Use this option to edit the activation task. You can change the status and due date and add attachments (files, URLs, and related notes) and notes (to describe activation task actions and progress, for example). **NOTE:** The value displayed in the **Notes** tab for the task and the resource's URL are both exported to Excel when exporting information on electronic resources. **VIDEO:** For more information, see the *Due Date Added to Activation Tasks List* video.
Edit Resource	Use this option to edit the e-resource. This opens the Electronic Collection Editor page enabling you to edit the e-resource in the various tabs. For information on the various tabs in the Electronic Collection Editor, see **Adding a Local Electronic Collection** on page 288. (In particular, note **Table 38** for an explanation of the parameters required for some electronic collections.)

Table 46. E-Resource Activation Action Options

Action	Description
Test Access	Use this option to test the system access to the database resource. If the electronic collection has a BIB and URL associated with it OR if the electronic collection has services associated with it, this option will appear. If the electronic collection has a BIB/URL with no services, clicking it shows the "ViewIt" page as was previously done for databases. If the electronic collection has services associated with it and no BIB/URL, clicking this will show the Portfolio List. If the electronic collection has both, clicking this will show the Portfolio List as was previously done for packages.
Activate (Deactivate)	Use this option to activate the e-resource. Selecting Activate makes the e-resource available for publishing for discovery (Primo). This is the mechanism that reveals or suppresses (Deactivate) the MARC bibliographic record linked to the database e-resource.
Assign To	Use this option to manage operator assignments in the Electronic Resource Activation Task List.
Release Assignment	Use this option to release an assignment in the Electronic Resource Activation Task List. Released assignments display on the Unassigned tab.
Done	Use this option to change the activation task status to **Done**. When this option is selected: ■ Interested Users receive an email notification that activation of the electronic resource is complete. For details on adding interested users to a PO line, see the **To create a PO line:** procedure in the *Alma Acquisitions Guide*. ■ The task is removed from the Opened Tasks list and displays only when the **All** or **Done** status views are selected.
Delete	Use this option to remove the electronic resource management task.

Click the **Actions** button:

- to view a resource’s status and due date
- to edit a resource’s status and due date

- To add an attachment to a resource
- To add a note to a resource
- to edit a resource's details
- to view a resource's content
- to activate a resource
- to change a resource's assignment
- to release a resource's assignment
- to mark a resource as done

To view a resource's status and due date:

Select **Actions > View** for a resource. The E-Activation Task Details page opens in view-only mode.

Figure 301: View E-Activation Task Details Page

To edit a resource's status and due date:

1 Select **Actions > Edit** for a resource. The E-Activation Task Details page opens in edit mode.

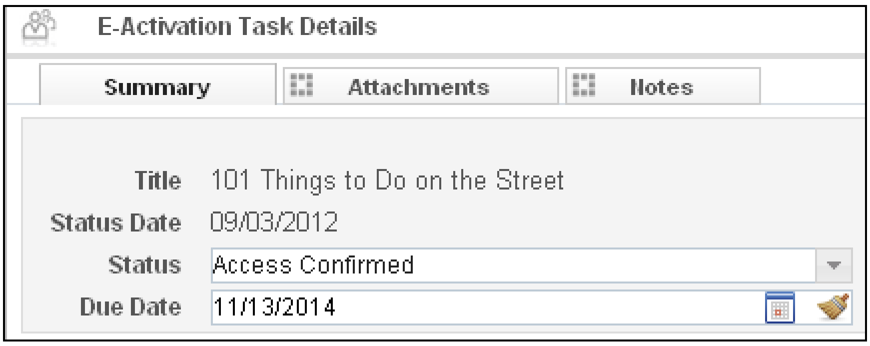


Figure 302: Edit E-Activation Task Details Page

2 Select the status to which you want to change the resource from the **Status** drop down list. The available options are:

- Access Confirmed
- Check Access
- Done
- Not Yet Online

3 Click the calendar icon and select a new due date. When the due date passes, a notification is sent to the user that is assigned the e-resource activation task and an alert is displayed in the user's list of tasks. For information on creating a default due date, see **Configuring Other Settings** on page **695**. For more information, see the **Manually Creating a PO Line** section of the *Alma Acquisitions Guide*.

VIDEO:
For more information, see the *Due Date Added to Activation Tasks List* video.

4 Click **Save**.

NOTE:
You can also edit the status of multiple resources on the Electronic Resource Activation Task List page by selecting the check box of the relevant resources, selecting the status from the drop-down list at the bottom of the page, and clicking **Change Status**. Refer to the figure below.

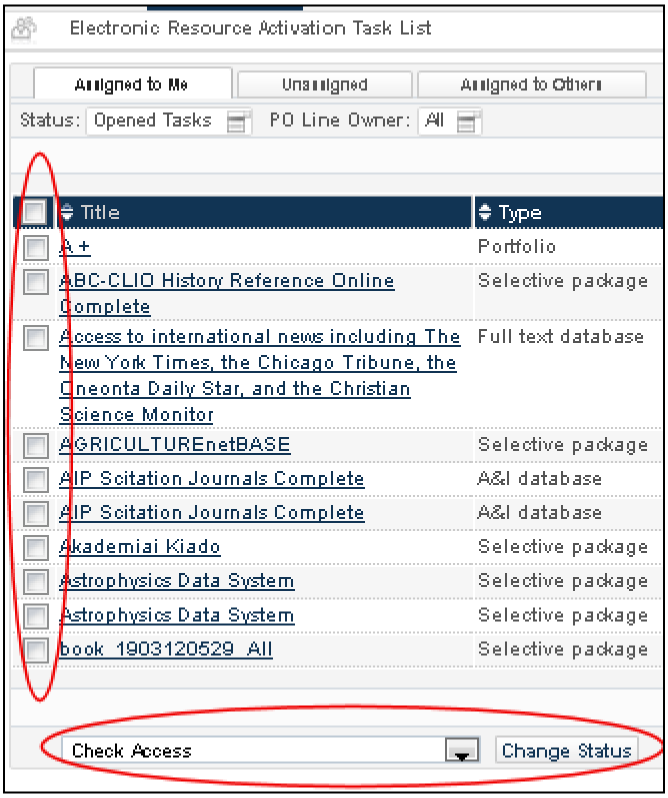


Figure 303: Change Status for Multiple Tasks from the Task List Page

To add an attachment to a resource:

1. Select **Actions > Edit** for a resource. The E-Activation Task Details page opens in edit mode.
2. Click the **Attachments** tab.
3. Click the Browse icon in the **File name** field and select a file.
4. Add a URL and/or note, if required.
5. Click **Add Attachment**. The attachment is displayed in the list of attachments in the Attachments tab.

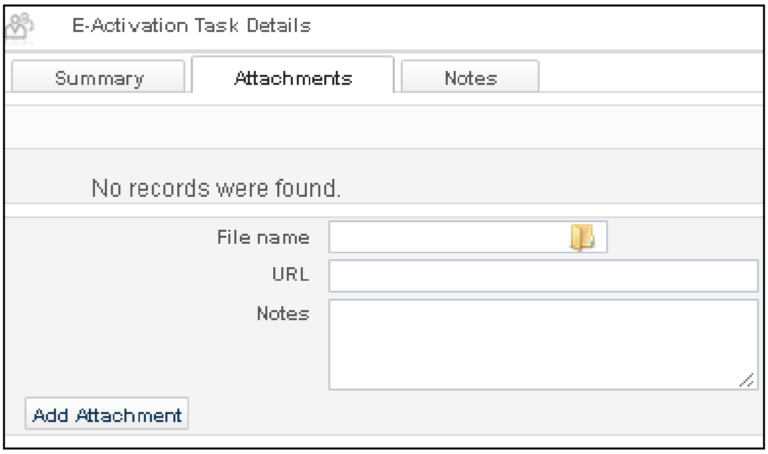


Figure 304: Attachment Tab Options

To add a note to a resource:

1. Select **Actions > Edit** for a resource. The E-Activation Task Details page opens in edit mode.
2. Click the **Notes** tab.
3. Enter a note into the **Note** area.
4. Add a URL and/or note, if required.
5. Click **Add**. The note is displayed in the list of notes in the Notes tab.

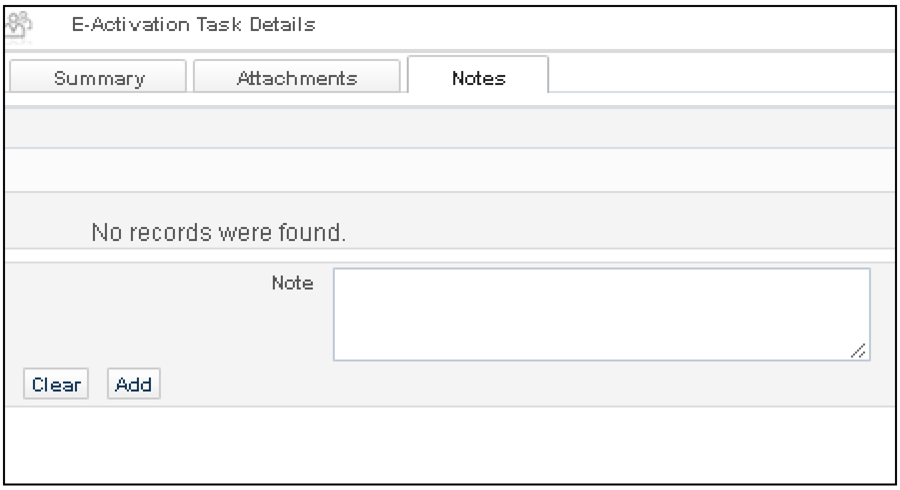


Figure 305: Notes Tab

To edit a resource's details:

Select **Actions > Edit Resource** for a resource. The Electronic Collection Editor page opens. For details on the Electronic Collection Editor page, see **Adding a Local Electronic Collection** on page **288**. (In particular, note **Table 38** for an explanation of the parameters required for some electronic collections.)

To view a resource's content:

1 Select **Actions > Test Access** for a resource.

- If the resource does not contain a portfolio, the Electronic Services page opens with a link to the resource's full text.
- If the resource contains a portfolio, the Portfolios List page opens.

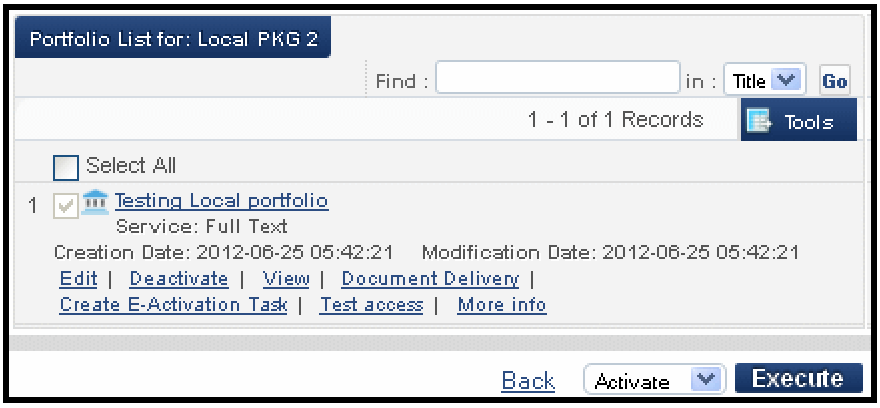


Figure 306: Portfolios List Page

The following table describes the options available on the Portfolios List page.

Table 47. Portfolios List Page Options

Option	Description
Edit	Displays the Electronic Portfolio Editor page, containing the portfolio details (see **Modifying a Portfolio Using the Electronic Portfolio Editor** on page **349**).

Table 47. Portfolios List Page Options

Option	Description
Activate	Activates or deactivates the portfolio, depending on its current status. The updated status is displayed at the top of the Portfolios List page. **NOTE:** To activate/deactivate multiple resources, select the check box for the resources, select **Activate** or **Deactivate** from the drop-down list (at the top or bottom right side of the page), and click **Execute**.
View	Enables viewing portfolio information on the Electronic Portfolio Editor page. Information accessed through this option is read-only.
Document delivery	Displays the Create Request page, where a request for the resource is configured (see **Creating a Request** in the *Alma Fulfillment Guide*).
Create e-activation task	Creates an electronic activation task for the resource. The updated status is displayed at the top of the Portfolios List page.
Test access	The Electronic Services page opens with a link to the resource's full text.
More info	A dialog box is displayed containing additional information about the resource. ■ Title—The resource title ■ Related—Indicates whether there are any related resources ■ Records—Indicates whether the resource contains any records ■ Orders—A link to orders that have been placed for the resource (if relevant). When clicking the link, the Select PO Line page is displayed for the resource. ■ Licenses—Indicates whether there are any licenses for the resource ■ Number of linked courses **VIDEO:** For information on displaying the courses associated with a title, see the *View Courses Linked to a Title* video (2:43 mins).

2 Click **Back** to return to the Electronic Resource Activation Task List page.

To activate a resource:

Select **Actions > Activate** for a resource.

- If the selected PO line is for a standalone or single title, a confirmation box opens. When you click **Confirm** to activate the resource, the Activation Feedback dialog box opens, asking if you want to edit the resource. Click **Confirm** to open the Electronic Collection Editor page and edit the resource, or click **Cancel** to return to the PO Lines Waiting for Activation page. For details on the Electronic Collection Editor page, see **Adding a Local Electronic Collection** on page **288**.
- If the selected PO line is for an electronic collection, the **Activation Wizard: Electronic Collection and Services Setup page** opens (see **Using the Activation Wizard** on page **406**).

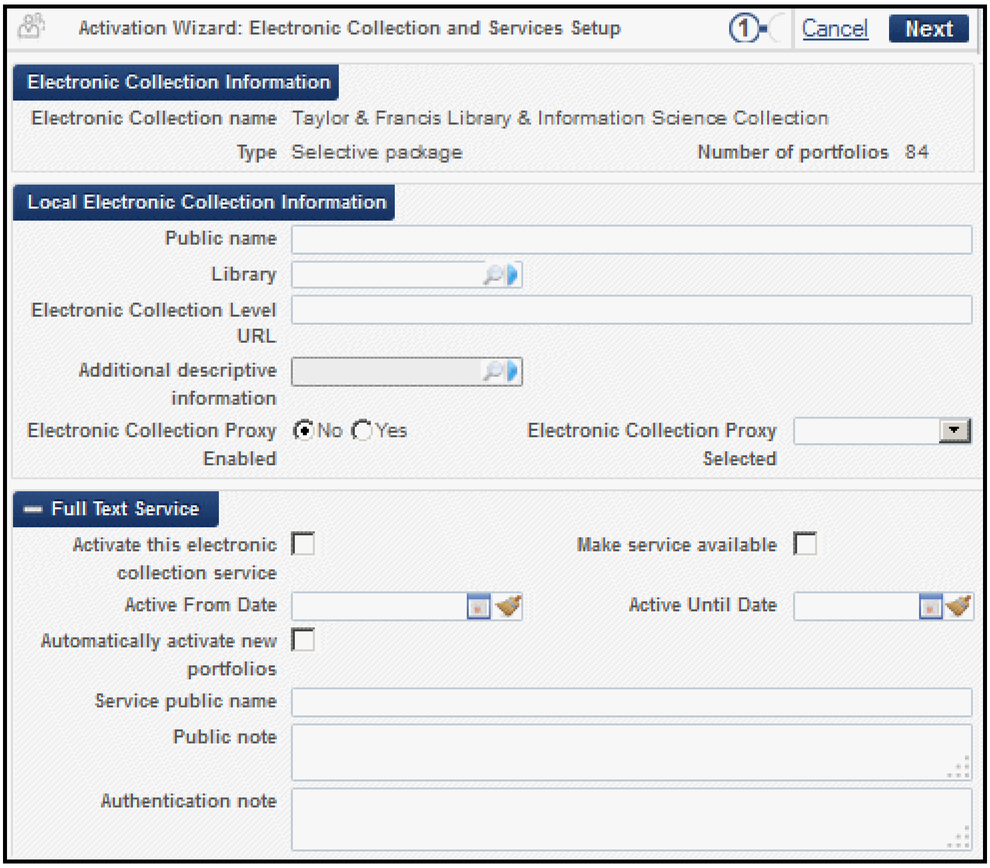


Figure 307: Activation Wizard: Electronic Collection and Services Setup Page

To change a resource's assignment:

1. Select **Actions > Assign To** for a resource. The **Assign To** dialog box opens.
2. From the **Assign to** drop down list, select a user to whom you want to assign the resource.
3. In the **Note** area, enter a note, as needed.
4. Select **Send as e-mail** to send a notification to the user through email.
5. Click **Assign To** to assign the resource to the indicated user.

To release a resource's assignment:

Select **Actions > Release assignment** for a resource**.** The resource is displayed in the **Unassigned** tab.

To mark a resource as done:

Select **Actions > Done** for a resource**.** The PO line continues to the next stage of the workflow, as follows:

- If the PO line is **One Time**, it closes when fully invoiced. If it is not fully invoiced, it is marked as **Waiting for Invoice** in the **Invoice status** field of the PO Line Summary page, and awaits invoicing (see **Invoicing** in the *Alma Acquisitions Guide*).
- If the PO line is **Continuous**, it is marked for renewal and is displayed on the PO Lines to Renew page.

Using the Activation Wizard

1. Enter the required information in the Activation Wizard: Electronic Collection and Services Setup Page, as described in the following table:

Table 48. Activation Wizard: Electronic Collection and Services Setup Fields

Field	Description
Local Electronic Collection Information:	
Public name	If you want to override the electronic collection name that is exposed to the public, enter a new name in this field.
Library	Click the Find icon to see a list of available libraries and select one.

Table 48. Activation Wizard: Electronic Collection and Services Setup Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Electronic Collection Level URL</td><td>Enter the URL for accessing the electronic collection.

NOTE:
When publishing portfolio bibliographic records, the system checks for a URL from this field. If no URL is found in this field, the portfolio bibliographic record is not published</td></tr>
<tr><td>Additional descriptive information</td><td>Click the Find icon to display the Repository Search page and search for the collection to link.</td></tr>
<tr><td>Electronic Collection Proxy Enabled</td><td>Specify if a proxy has been enabled (Yes/No).

Refer to the Resolver Proxies section in the Alma Integrations with External Systems Guide for information regarding proxy relationships among portfolios, electronic collections, and services.</td></tr>
<tr><td>Electronic Collection Proxy Selected</td><td>When you specify Yes for Proxy enabled, you need to identify which proxy profile is to be used for authentication (of users outside the library’s network) to access the online database you have created. Select a proxy profile option from the drop-down list.

Refer to the Resolver Proxies section in the Alma Integrations with External Systems Guide for information regarding how to create a proxy profile.</td></tr>
<tr><td colspan="2">Full Text Service:

This section lists the types of electronic collection services available for the resource being activated. Each electronic collection service is listed separately, and the fields described in this table must be completed for each electronic collection service that you want to activate.</td></tr>
<tr><td>Activate this electronic collection service</td><td>Select this option to activate an electronic collection service. If your electronic collection has more than one service, selecting this check box enables you to indicate the service you want to activate. (You also must select this check box even when there is only one service for the electronic collection.)</td></tr>
<tr><td>Make service available</td><td>Select this option to activate the service.

NOTE:
Staff may select Activate this service and not select Make service available in order to test the service before making it available for publishing to patrons.</td></tr>
</table>

Table 48. Activation Wizard: Electronic Collection and Services Setup Fields

Field	Description
Activate from date	Click in the **Activate from date** box and select the required date from the **Calendar** dialog box. If you do not enter an **Activate from date**, the activation starts from the current date (today).
Activate until date	Click in the **Activate until date** box and select the required date from the **Calendar** dialog box. If you do not enter an **Activate until date**, the activation continues indefinitely.
Access rights	You can restrict access to the electronic collection to users with specific access rights. The types of access rights are predefined by an administrator and can be selected from the **Access rights** drop-down list.
Automatically activate new portfolios	Select this check box if you want to automatically activate new portfolios associated with this electronic collection. The option to automatically activate new portfolios associated with a service is available for selective as well as aggregator electronic collections. (This option can be configured from both the Activation Wizard for new services and in the Electronic Services Editor for existing services.)
Service public name	If you want to override the service name that is exposed to the public, enter a new name in this field.
Service note	Enter any service notes for the electronic collection (to be displayed in the discovery system).
Service authentication note	Enter any service authentication-related notes for the electronic collection. These notes are displayed in the discovery system.

2 Click **Next**. The Activation Wizard: Select Activation Method page opens.

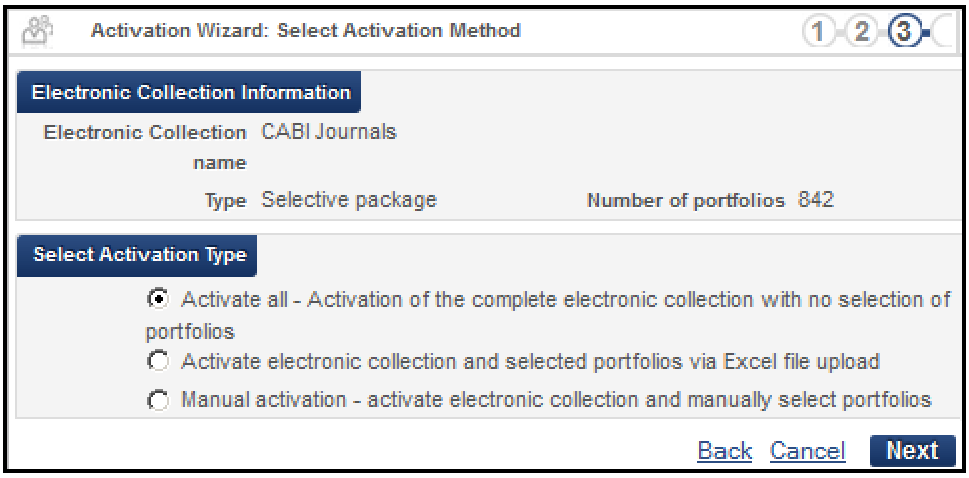


Figure 308: Activation Wizard: Select Activation Method Page

3 In the **Select Activation Type** area, select one of the following:

- **Activate all** – Activate all the portfolios in the electronic collection
- **Activate electronic collection and selected portfolios via Excel file upload**
- **Manual activation** – Activate the electronic collection and manually select the portfolios you want

4 Click **Next**.

- If you selected **Activate electronic collection and selected portfolios via Excel file upload** in the previous step, the Activation Wizard: File Upload page opens.

  In the **Select File** area, browse to the location of the Excel file you want to upload and select the file. Select loading policy preferences.

NOTE:
If you want to change any information in the wizard, click **Back** to take you to the page you want to modify and modify the information as needed.

- If you did not select **Activate electronic collection and selected portfolios via Excel file upload,** the Activation Wizard: Activation Summary page opens.

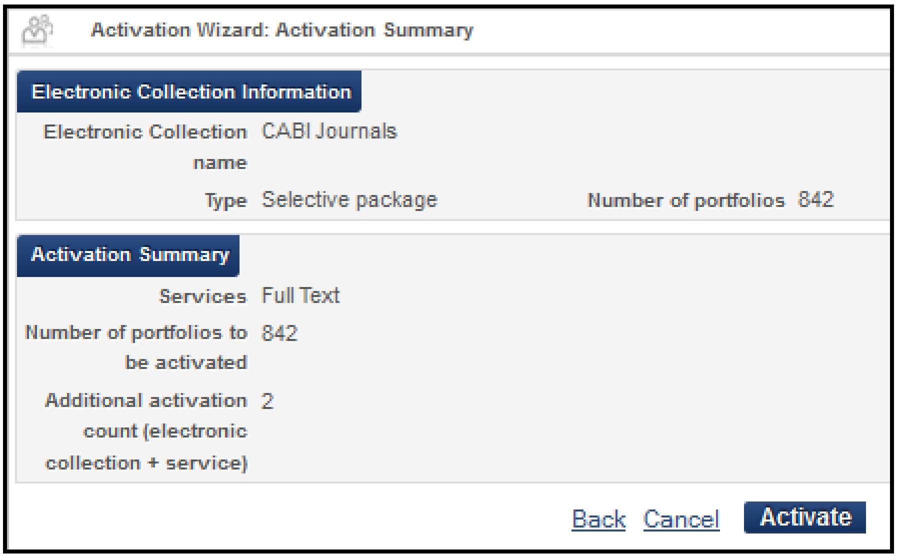


Figure 309: Activation Summary Page for Selective Load

- Verify that the information displayed in the **Activation Summary** area is correct.

5 Click **Activate**. Alma activates the titles in the manner you specified and returns you to the previous Repository Search page.

Managing Patrons' Access to E-Resources Using Alma Resolver

In addition to associating patrons with a campus/library based on the patron IP address, Alma is able to associate a patron with a campus/library for the purpose of resolving electronic services based on group settings used by the Alma Resolver that display on the Electronic Services page. (For collaborative environments, refer to **Configuring Inventory Available For Management Groups for Collaborative Environments** on page 48 in the collaborative network documentation for more information regarding group settings.)

Alma is able to associate a patron with campus/library information from the following sources:

- Logged in user – The patron is associated with the campus with which his/her logged-in user ID is affiliated.
- OpenURL base URL – The OpenURL base URL can now include the campus/library and, using this, associate the patron with the campus/library that is part of the OpenURL.

  See the figure below where –MAIN in the OpenURL request is the campus.

```
http://<base URL>/view/uresolver/01PRIN_INST/openurl-MAIN?&
u.ignore_date_coverage=true&rft.mms_id=996706770000121&rfr_id=
info:sid/primo.exlibrisgroup.com&svc_dat=viewit&test_access=true
```

Figure 310: OpenURL Request URI Example Where **-MAIN** is the Campus

Once the user is associated with a campus/library from the various sources, Alma can locate the relevant Available For groups (refer to **Adding Group Settings to Electronic Resources** on page 280 and **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730 for more information regarding Available For group settings) in order to determine the appropriate services to offer to the user via the Alma Resolver (View It). The goal is to present the user with only the electronic services which he may access.

Link Resolving Examples

Refer to the tables below (**Table 49** and **Table 50**) for use case examples where a patron uses an OpenURL-compliant third-party database (such as Google Scholar, EBSCO, or ProQuest) or Primo to search for and successfully find a title and how the Alma link resolver processes/determines the relevant services to present to the patron. The following are key pieces of information that enable the Alma link resolver to successfully identify the relevant services to present:

- Campus (location)
- Campus group association (refer to **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730)
- IP
- OpenURL

Table 49. Use Case Examples - Delivery from Third Party

Use Case (See Figures Below)	Patron Physical Location	Logged In to Primo	Third-Party Database	Information Provided to Alma Link Resolver	Services Presented to the Patron
1	Main Campus	No (User is unknown)	Accessing the Google Scholar account for the Main Campus	IP=Main Campus OpenURL= Main Campus	Services that are associated with the Available For groups of which the Main Campus is a part

Table 49. Use Case Examples - Delivery from Third Party

Use Case (See Figures Below)	Patron Physical Location	Logged In to Primo	Third-Party Database	Information Provided to Alma Link Resolver	Services Presented to the Patron
2	Main Campus	No (User is unknown)	Accessing the Google Scholar account for the City Campus	IP=Main Campus OpenURL= City Campus	Services that are associated with the Available For groups of which the Main Campus and City Campus are a part **NOTE:** For a City Campus resource, the patron may be challenged with a proxy for the City Campus.
3	Off Campus	No (User is unknown)	Accessing the Google Scholar account for the Main Campus	IP=? OpenURL= Main Campus	Services that are associated with the Available For groups of which the Main Campus is a part

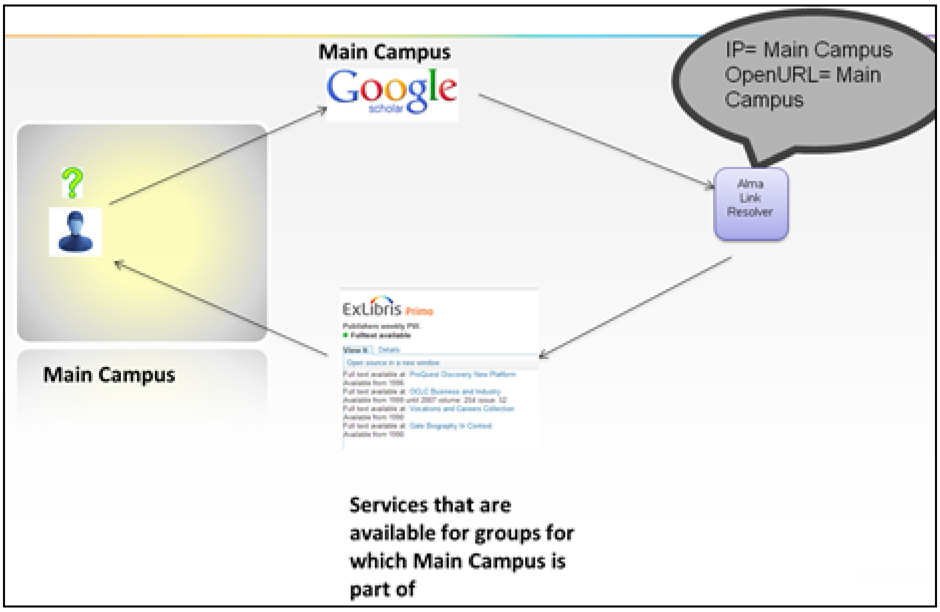


Figure 311: Delivery from Third Party - Use Case 1

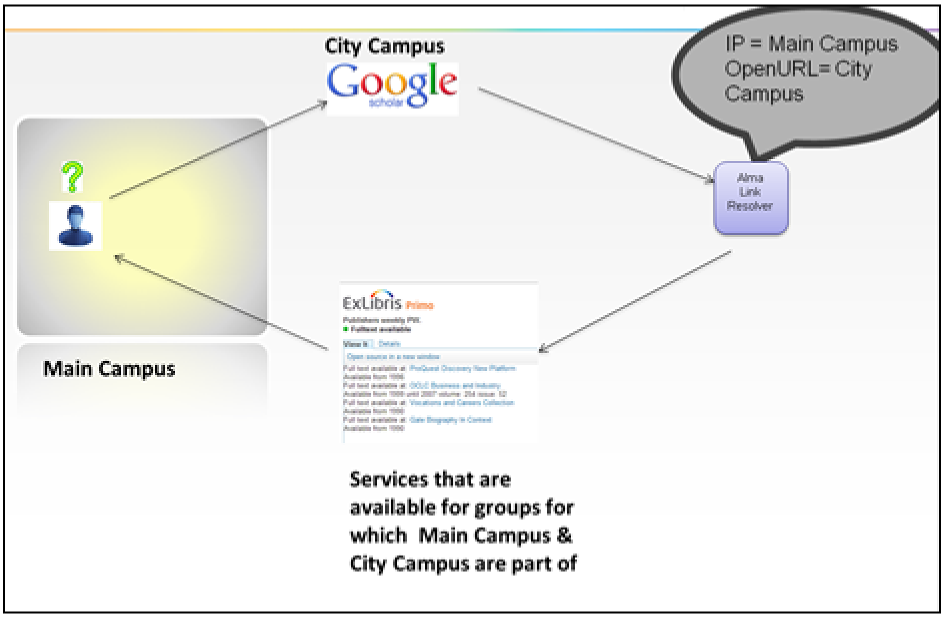


Figure 312: Delivery from Third Party - Use Case 2

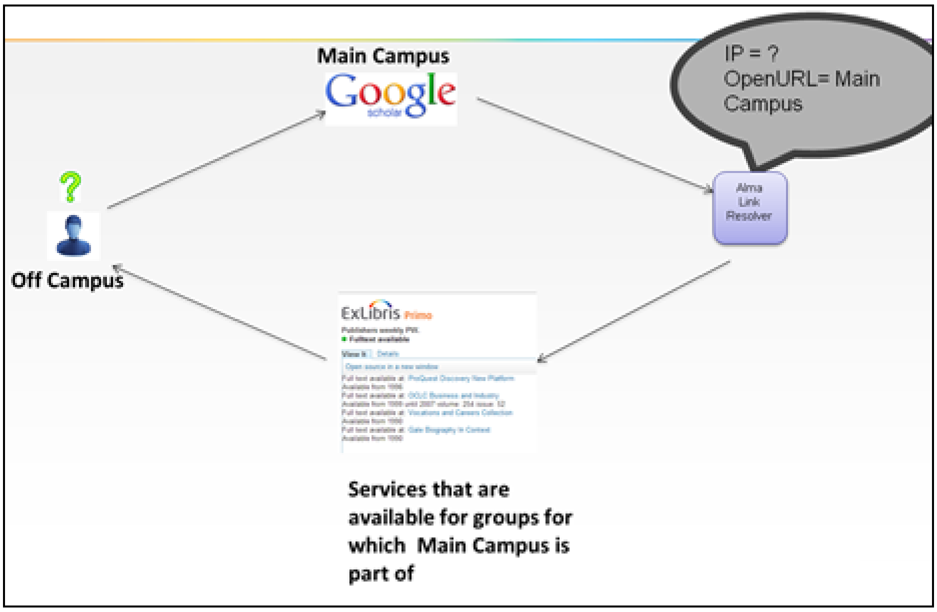


Figure 313: Delivery from Third Party - Use Case 3

Table 50. Use Case Examples - Delivery from Primo

Use Case (See Figures Below)	Patron Physical Location	Logged In to Primo	Primo View	Information Provided to Alma Link Resolver	Services Presented to the Patron
1	Main Campus	No (User is unknown)	Accessing the Primo view for the Main Campus	IP=Main Campus OpenURL= Main Campus	Services that are associated with the Available For groups of which the Main Campus is a part

Table 50. Use Case Examples - Delivery from Primo

Use Case (See Figures Below)	Patron Physical Location	Logged In to Primo	Primo View	Information Provided to Alma Link Resolver	Services Presented to the Patron
2	Main Campus	No (User is unknown)	Accessing the Primo view for the City Campus (not this user's own view)	IP=Main Campus OpenURL= Main Campus **NOTE:** Primo also identies the IP of the user which in this case is connected to the Main Campus.	Services that are associated with the Available For groups of which the Main Campus is a part
3	Main Campus	Yes **NOTE:** His affiliation is with the City Campus	Accessing the Primo view for the Main Campus	User=City Campus IP=Main Campus OpenURL= City Campus	Services that are associated with the Available For groups of which the Main Campus and City Campus are a part **NOTE:** For a City Campus resource, the patron may be challenged with a proxy for the City Campus.
4	Off Campus	No (User is unknown)	Accessing the Primo view for the City Campus	IP=? OpenURL= City Campus	Services that are associated with the Available For groups of which the City Campus is a part

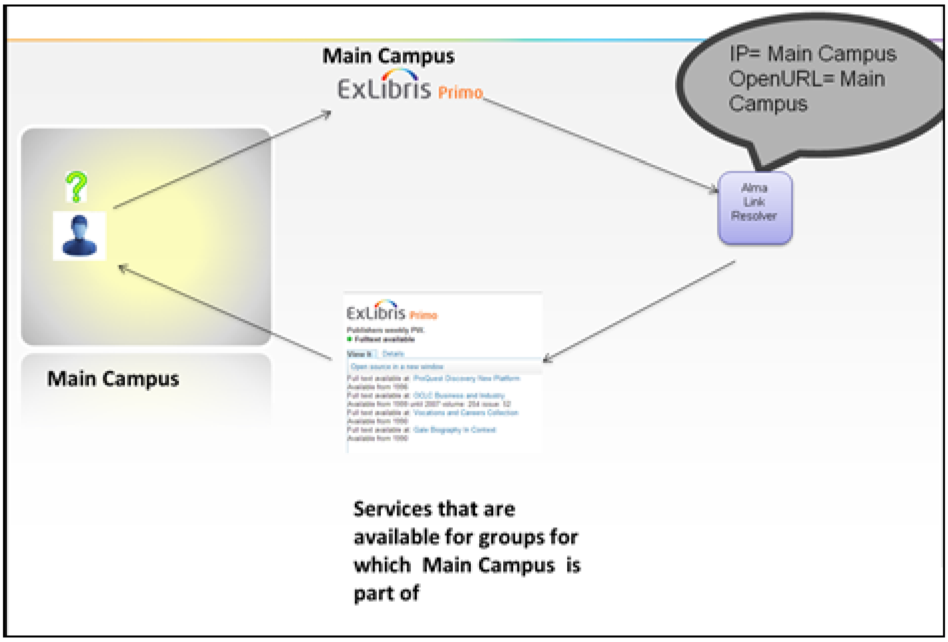


Figure 314: Delivery from Primo - Use Case 1

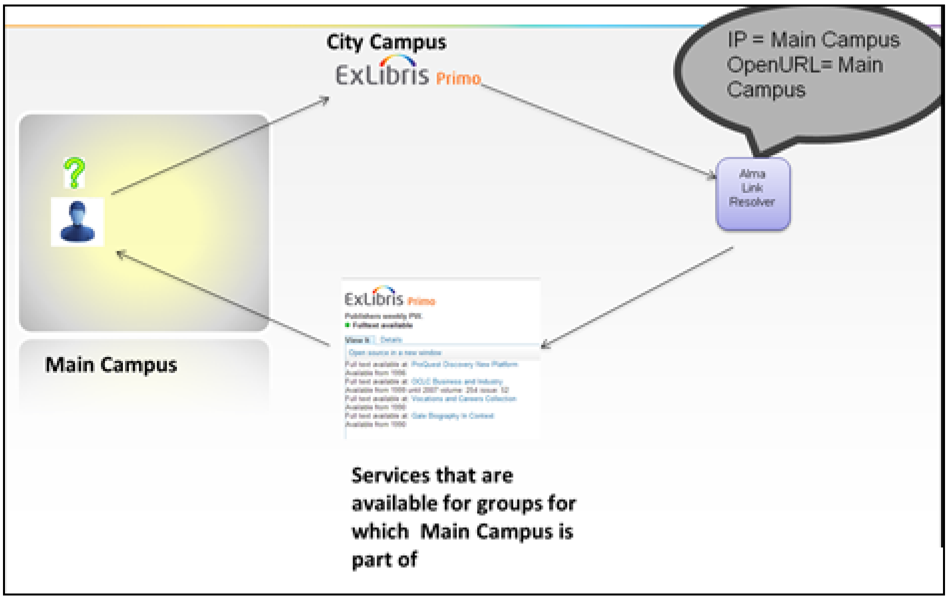


Figure 315: Delivery from Primo - Use Case 2

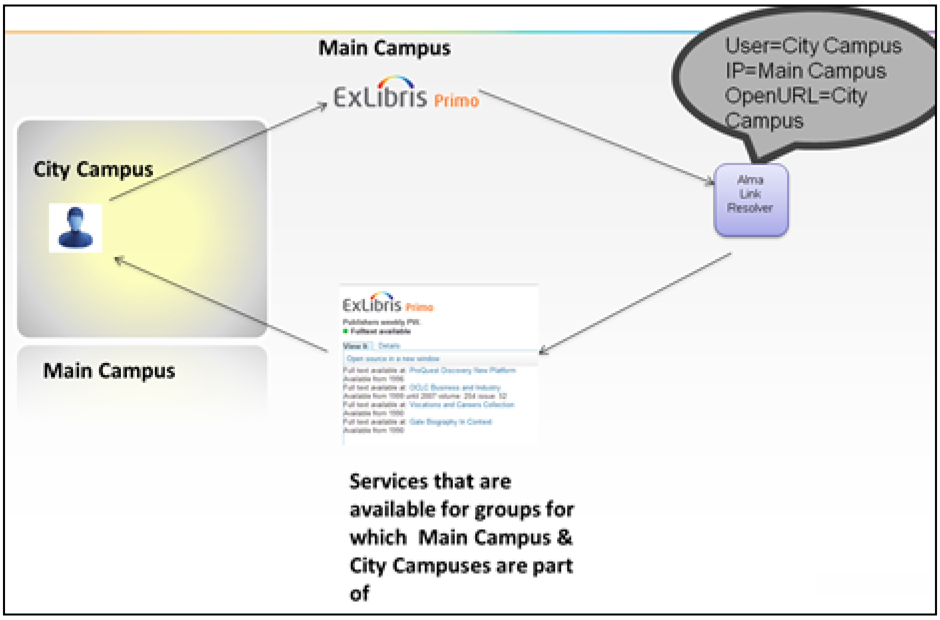


Figure 316: Delivery from Primo - Use Case 3

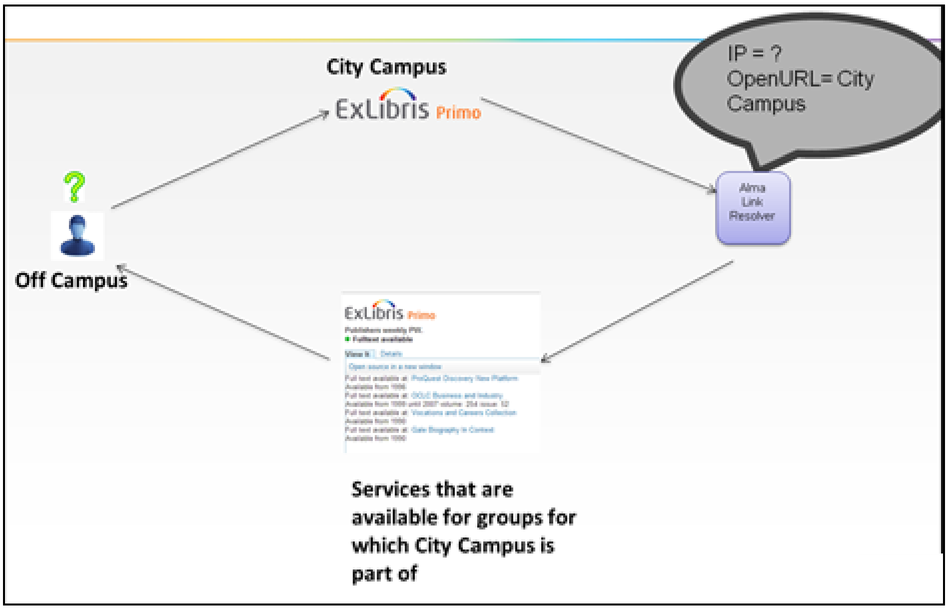


Figure 317: Delivery from Primo - Use Case 4

Using the Alma Resolver Electronic Services Page

The Electronic Services page is the location where you can:

- View the results of electronic linking settings when you test access (refer to **Managing Electronic Resource Activation** on page 395)
- Debug services (refer to **Using the Alma Resolver Debugger Tool** on page 420)

The Electronic Services page displays the following metadata, when available, for a book:

- Book title
- ISBN
- Author last name
- Author first name (or initials)
- Year information

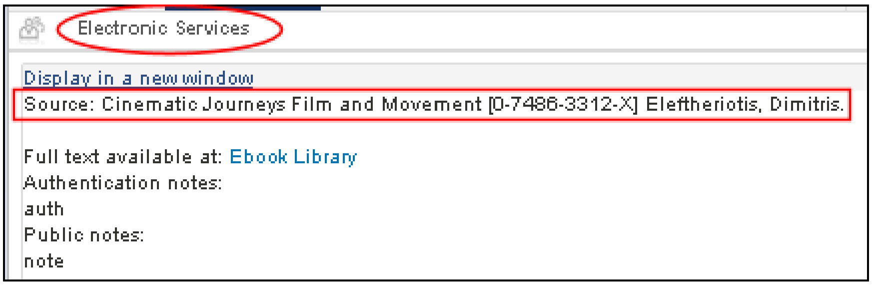


Figure 318: Electronic Services Page Metadata

The Electronic Services page displays the following metadata, when available, for a journal:

- Journal title
- ISSN
- Year

Group settings also determine what is available for patrons to view. For additional information regarding group settings see:

- **Configuring Inventory Available For Management Groups for Multicampus Environments** on page 730
- **Configuring Inventory Available For Management Groups for Collaborative Environments** on page 48 in the consortial documentation

The Electronic Services page displays a no full text services message when there are no full text services available for the OpenURL request.

Figure 319: No Full Text Available Message

The wording of the no full text services message may be customized to match your requirements.

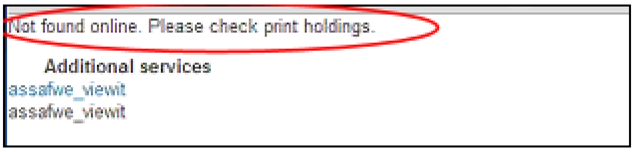


Figure 320: Customized No Full Text Available Message

To customize the wording for the no full text message:

1. On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under D**iscovery Interface Display Logic**. The Discovery Interface Labels code table page opens.
2. Locate the row with `c.uresolver.emptyList` in the Code column.

Figure 321: c.uresolver.emptyList Code Table Option

3. Click the **Customize** button for this row. The Description column for the row opens for you to enter your customized message text.
4. Enter the text you want to display on the Electronic Services page when no full text is available.

NOTE:
If you prefer that no message be displayed when no full text is available, leave this option blank.

5. Click the page **Customize** button.

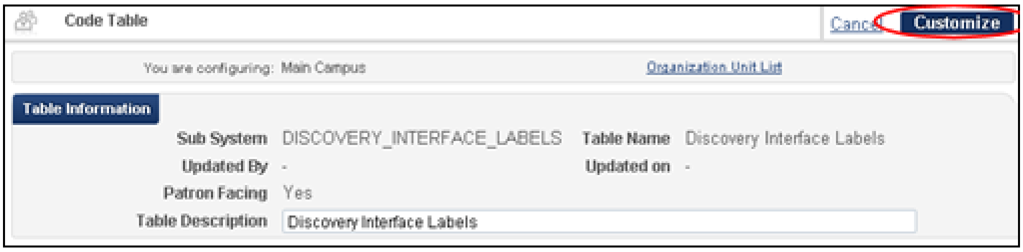


Figure 322: Page Customize Button

OCLC Number Matching with Alma Resolver

The Alma Resolver provides comprehensive matching on OCLC numbers when processing an OpenURL with `rft.oclcnum` in the statement, as in the following example:

```
http://<host>/openurl/EX/example_services_page&rft.oclcnum=12345678
```

This is achieved by separately indexing the 035 $a and 035 $z subfields.

Using the Alma Resolver Debugger Tool

Alma provides a debugger tool to analyze the context services that are offered by Alma Resolver, enabling staff to perform basic troubleshooting. The tool consists of an OpenURL input message that allows you to request an XML debugger response from Alma Resolver. From the XML response, you can:

- Determine the service calculation
    - View the context object that was calculated based on the OpenURL parsing, augmentation, and related service
    - Understand how the context services object was generated
        - What were the potential services
        - Which services were added based on the calculation of related services
        - Which services were filtered out based on coverage or rules for general electronic services and display logic
- Determine the link resolution and how the OpenURL was generated
    - Which target parser was used
    - Was a proxy used
    - Was it a static URL on the portfolio level
    - Is there a direct link
    - View the end-result URL
- View the original OpenURL in the debugging content provided

To run the debug tool:

1 Search the repository for the electronic title or portfolio that you want to test access. The list of brief results opens.

2 Depending on the type of results, click **View It** (electronic titles) or **Test Access** (electronic portfolios) for an item in the list. You can also test access from the Portfolios List page and the Portfolios tab on the Electronic Service Editor page. The Electronic Services page opens.

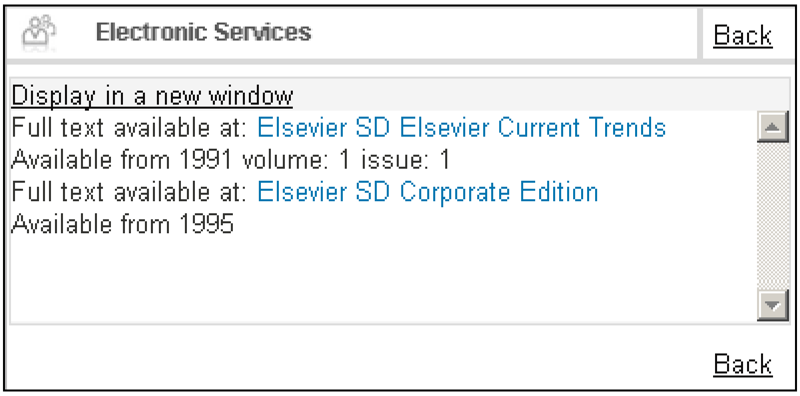


Figure 323: Alma Electronic Services Page

3 Right-click the frame on the Electronic Services page and select the option to view the page or frame source. The options are somewhat different for each browser.

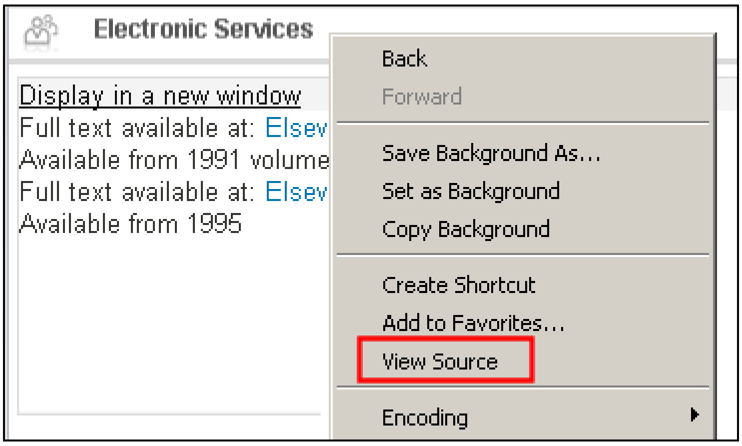


Figure 324: Select View Page Source Option

4 Locate the DEBUG section at the top of the source view and copy the URL.

```
<html xmlns="http://www.w3.org/1999/xhtml">
<!-- DEBUG:
<li>http://il-urm01.corp.exlibrisgroup.com:1807/view/uresolver/EXLDEV1_INST/openurl?svc_dat=CTO&debug=true&debug=true&u.ignore_date_coverage=true&rft.mms_id=993273360000121&rfr_id=info:sid/primo.exlibrisgroup.com&svc_dat=viewit&test_access=true</li>

END DEBUG-->
 <head>
        <meta http-equiv="Content-Type"
 content="text/html; charset=utf-8" />
```

Figure 325: Highlight and Copy the DEBUG URL

5 Open a new browser page or tab, paste the debug URL that you copied in the previous step into the address bar of the new page or tab, and press **ENTER**. The XML displays starting with the `<context object>` element.

```
<uresolver_content xmlns="http://com/exlibris/urm/uresolver/
xmlbeans/u" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <context_object>
    <keys>
      <key id="genre">book</key>
      <key id="available_services">viewit</key>
      <key id="available_services">getit</key>
      <key id="rft.jtitle">Current opinion in neurobiology</key>
      <key id="debug">true</key>
      <key id="u.ignore_date_coverage">true</key>
      <key id="abbrevTitle">Current opinion in neurobiology</key>
      <key id="stitle">Current opinion in neurobiology</key>
      <key id="rft.pubdate">Began with v. 1, issue 1 published June
1991.</key>
      <key id="ctx_id">505326480000121</key>
      <key id="rft.issn">0959-4388</key>
      <key id="journalTitle">Current opinion in neurobiology</key>
      <key id="rft.object_type">JOURNAL</key>
      <key id="rft.oclcnum">36905829</key>
      <key id="eISSN">1873-6882</key>
      <key id="rft.stitle">Current opinion in neurobiology</key>
      <key id="rft.genre">book</key>
      <key id="req.id" xsi:nil="true"/>
      <key id="rft.title">Current opinion in neurobiology</key>
      <key id="ISSN">0959-4388</key>
      <key id="test_access">true</key>
      <key id="rfr_id">info:sid/primo.exlibrisgroup.com</key>
      <key id="inventory_id">517970130000121</key>
      <key id="rft.eissn">1873-6882</key>
      <key id="objectType">JOURNAL</key>
      <key id="Incoming_URL">http%3A%2F%2Fil-
urm01.corp.exlibrisgroup.com%3A1807%2Fview%2Furesolver%2FEXLDEV1_IN
ST%2Fopenurl%3Fdebug%3Dtrue%26svc_dat%3DCTO%26debug%3Dtrue%26debug%
3Dtrue%26u.ignore_date_coverage%3Dtrue%26rft.mms_id%3D9932733600001
21%26rfr_id%3Dinfo%3Asid%2Fprimo.exlibrisgroup.com%26svc_dat%3Dview
it%26test_access%3Dtrue</key>
    </keys>
  </context_object>
  <context_services>
    <context_service context_service_id="824182260001021"
service_type="getFullTxt">
```

```
      <keys>
        <key id="portfolio_PID">5310538980000121</key>
        <key id="package_name">Elsevier ScienceDirect</key>
        <key id="package_public_name">Elsevier SD Elsevier Current
Trends</key>
        <key id="package_display_name">Elsevier SD Elsevier Current
Trends</key>
        <key id="package_pid">6110539390000121</key>
        <key id="service_type_description">Full text available via</
key>
        <key id="parser_program">ELSEVIER::SCIENCE_DIRECT</key>
        <key id="parse_parameters">host=http://
www.sciencedirect.com/science/ &amp; prefsite = sd &amp; shib=</
key>
        <key id="proxy_enabled">false</key>
        <key id="proxy_selected">DEFAULT</key>
        <key id="related_title">@TITLE (@RelationType)</key>
        <key id="crossref_enabled">yes</key>
        <key id="character_set">null</key>
        <key id="interface_name">Elsevier ScienceDirect</key>
        <key id="Is_free">0</key>
      </keys>
      <target_url>www.another.exl?url=http://www.sciencedirect.com/
science/journal/09594388</target_url>
      <is_error>false</is_error>
      <error_code>null</error_code>
    </context_service>
    <context_service context_service_id="824182250001021"
service_type="getFullTxt">
      <keys>
        <key id="portfolio_PID">537987300000121</key>
        <key id="package_name">Elsevier ScienceDirect</key>
        <key id="package_public_name">Elsevier SD Corporate
Edition</key>
        <key id="package_display_name">Elsevier SD Corporate
Edition</key>
        <key id="package_pid">617950310000121</key>
        <key id="service_type_description">Full text available via</
key>
```

```
        <key id="parser_program">ELSEVIER::SCIENCE_DIRECT</key>
        <key id="parse_parameters">host=http://
www.sciencedirect.com/college/ &amp; prefsite = sd &amp; shib=</
key>
        <key id="proxy_enabled">false</key>
        <key id="proxy_selected">DEFAULT</key>
        <key id="related_title">@TITLE (@RelationType)</key>
        <key id="crossref_enabled">yes</key>
        <key id="character_set">null</key>
        <key id="interface_name">Elsevier ScienceDirect</key>
        <key id="Is_free">0</key>
      </keys>
      <target_url>www.another.exl?url=http://www.sciencedirect.com/
college/journal/09594388</target_url>
      <is_error>false</is_error>
      <error_code>null</error_code>
    </context_service>
  </context_services>
  <performance_counters>
    <performance_counter name="TOTAL" duration="0.0"/>
    <performance_counter name="MMS_LOOKUP" duration="0.0"/>
    <performance_counter name="ENRICH" duration="0.0"/>
    <performance_counter name="PARSE" duration="0.0"/>
    <performance_counter name="GET_SERVICES" duration="0.017"/>
    <performance_counter name="FILTER" duration="0.01"/>
    <performance_counter name="SAVE" duration="0.0060"/>
    <performance_counter name="GET_SINGLE_SERVICE" duration="0.0"/>
    <performance_counter name="EXECUTE_TARGET_PARSER"
duration="0.0"/>
    <performance_counter name="GET_URESOLVER_CONTENT"
duration="0.0"/>
    <performance_counter name="UPDATE_SELECTED" duration="0.0"/>
  </performance_counters>
</uresolver_content>
```


Figure 326: Example XML Debugger Output

6. Scroll through the XML to analyze/debug your search result issues.

   After the `<context object>` element is the `<context services>` element that contains information regarding service type, parsing, proxy, the target URL, and so forth.

   Notice that in cases where records were filtered out from displaying in the results, the XML output contains key IDs for **Filter** (true or false) and **Filter reason**. For example, if the **Filter reason** parameter contains **Date Filter** and the OpenURL input specified a data parameter of **year=2010**, this may indicate that the record was filtered because it was outside of the specified date range.

Managing Digital Resources

PERMISSIONS:

To manage digital resources, you must have the following roles:

- Digital Inventory Operator
- Digital Inventory Operator Extended (required for delete operations)

A digital resource is content that is stored in digital formats (as opposed to print, microform, or other media) and accessible through computers. This content may be converted from a physical medium (such as paper) using digitization. Once the digital content has been produced, it can be stored in a local storage network or the Alma cloud and then viewed by end users.

In Alma, digital resources contain the following levels, which are configured with an associated editor and linked to a bibliographic MMS record:

- **Digital IE** – The Digital Representation Resource Editor defines additional metadata associated with a digital title, and lists the associated representations.
- **Digital representation** – The Digital Representation Resource Editor defines additional metadata for each digital representation of the digital title, and lists the associated digital files.
- **Digital file** – The Digital File Resource Editor defines the metadata associated with a specific digital file. A digital representation may have more than one file associated with it.

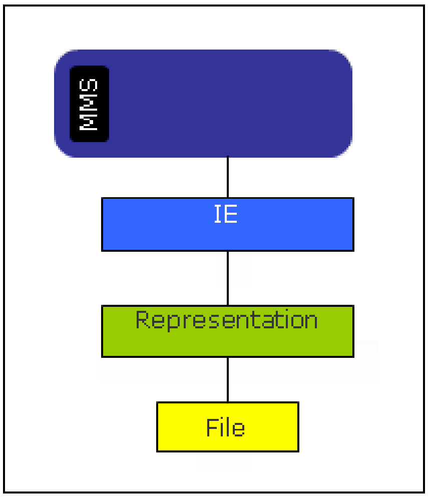


Figure 327: Digital Resource Hierarchy

Alma provides the capability for:

- Updating metadata at each level as follows:
  - Updating Title-Level Metadata
  - Updating Representation-Level Metadata
  - Updating File-Level Metadata
- Adding Digital Representations
- Deleting Digital Inventory, Representations, and Files
- Running Reports and Services

Updating Title-Level Metadata

During the creation and submission of digital resources, metadata is stored with the digital object. The Digital IE Resource Editor allows you to update or include additional metadata at the title level.

To update metadata at the title level:

1 Search for the digital title that you want to update. For more information, see Using the Alma Repository Search on page 18.

The brief results display for the digital title.

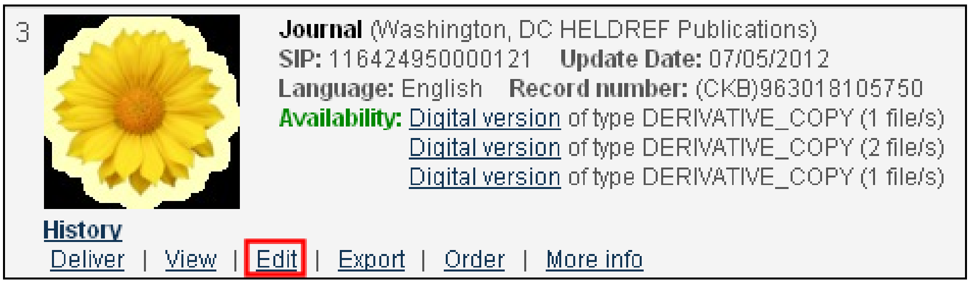


Figure 328: Brief Results for Digital Title

2 Click **Edit**.

The Digital IE Resource Editor page opens.

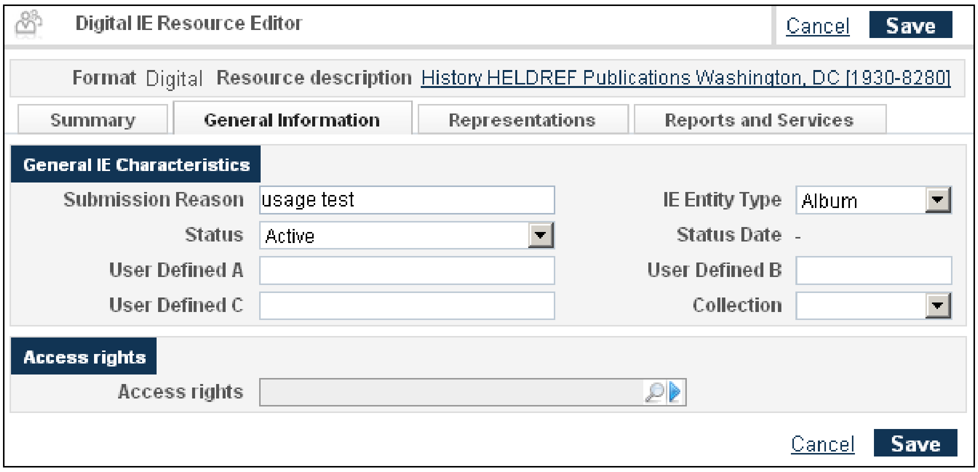


Figure 329: Digital IE Resource Editor Page

3 Click the **General Information** tab.

4 Enter the metadata information as described in the following table.

Table 51. General Information Tab Fields

Field	Description
General IE Characteristics section:	
Submission Reason	Enter the reason for submitting this digital tile.
IE Entity Type	Select the type of content (such as book, journal, or album) that this digital title represents.
Status	Enter the status of this digital title.
Status Date	Enter the date of the status provided.
User Defined A, B, and C	Currently not used by the system.
Collection	If you want the digital title added to a specific collection, enter the collection name.
Access rights section:	
Access rights	Select the type of access that is allowed for users. If no value is selected, access is enabled according to the **access_right_default_policy** setting on the CustomerParameters Mapping Table (see **Configuring Other Settings** on page **695**). The specified access right is invoked according to the rules with which it is associated (see **Configuring Access Rights** in the *Alma Fulfillment Guide*).

5 Click **Save**.

Updating Representation-Level Metadata

During the creation and submission of digital resources, metadata is stored with the digital object. The Digital Representation Resource Editor allows you to update or include additional metadata at the representation level.

To update metadata at the representation level:

1 Search for the digital title that you want to update. For more information, see **Using the Alma Repository Search** on page **18**.

The brief results display for the digital title.

2 Click **Edit**.

The Digital IE Resource Editor page opens.

3 Click the **Representations** tab.

The Representations tab opens.

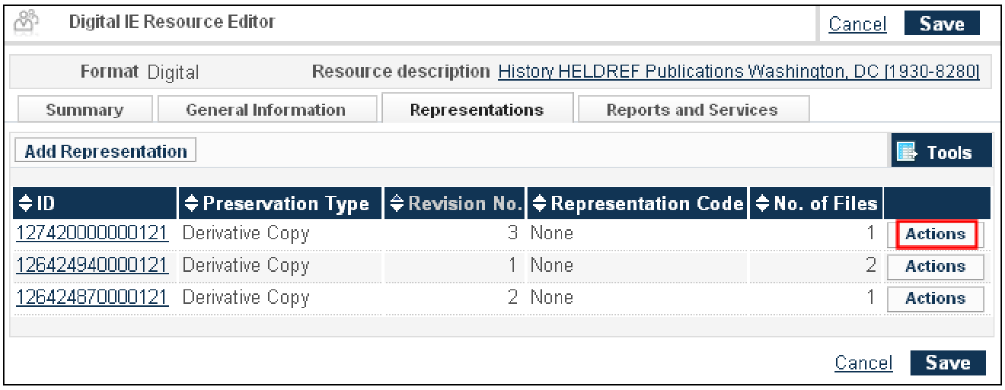


Figure 330: Representations Tab

4 Select **Actions > Edit** for a representation.

The Digital Representation Resource Editor opens.

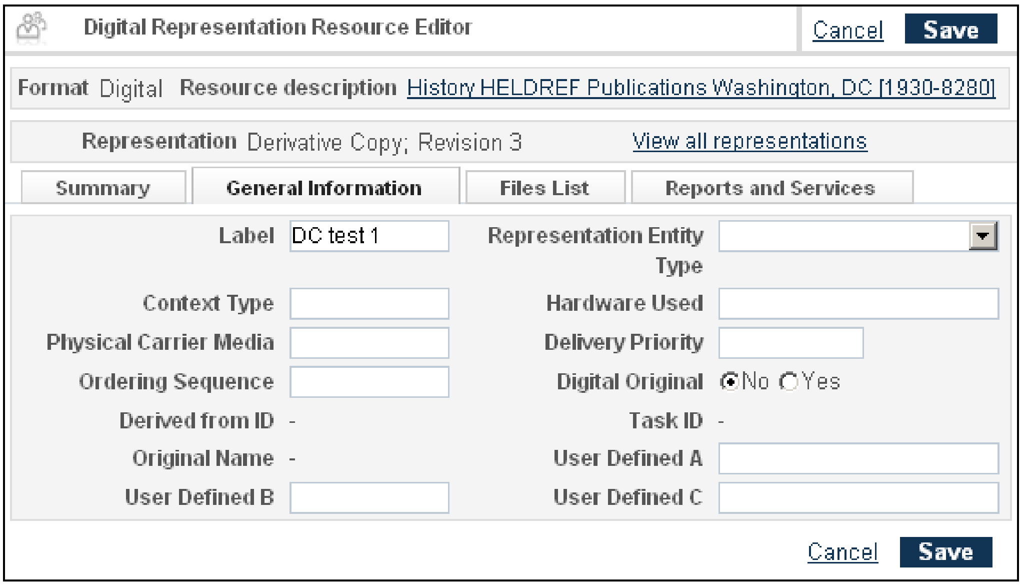


Figure 331: Digital Representation Resource Editor

5 Click the **General Information** tab.

6 Enter the metadata information as described in the following table.

Table 52. General Information Tab Fields

Field	Description
Label	Enter the display label for the digital representation.
Representation Entity Type	Differentiates between digital representations. For example, it could indicate that the files are stored in a specific format (such as TIFF) in order to determine the appropriate viewer for delivery.
Context Type	Currently not used by the system.
Hardware Used	Describes the hardware that is needed to render the files. Currently not used by the system.
Physical Carrier Media	Describes the carrier (such as tape or disk) of the physical content.
Delivery Priority	Prioritizes the digital representation and files for delivery. Currently not used by the system.
Ordering Sequence	Determines the order of files for delivery. Currently not used by the system.
Digital Original	Indicates whether the digital title was originally digital (such as a Word file), not a digitization of a physical resource (such as a book). Select **Yes** or **No**.

Table 52. General Information Tab Fields

Field	Description
Derived from ID	If this object is a copy or a migrated copy of a different object, enter the original object's ID.
Task ID	The ID of the task that was performed in the preservation system to update the digital object.
Original Name	The name of the original file before it was loaded into the preservation system.
User Defined A, B, and C	Currently not used by the system.

7 Click **Save**.

Updating File-Level Metadata

During the creation and submission of digital resources, metadata is stored with the digital object. The Digital File Resource Editor allows you to update or include additional metadata at the file level.

To update metadata at the file level:

1 Search for the digital title that you want to update. For more information, see **Using the Alma Repository Search** on page 18.

The brief results display for the digital title.

2 Click **Edit**.

The Digital IE Resource Editor page opens.

3 Click the **Representations** tab.

The Representations tab opens.

4 Select **Actions > Edit** for a representation.

The Digital Representation Resource Editor opens.

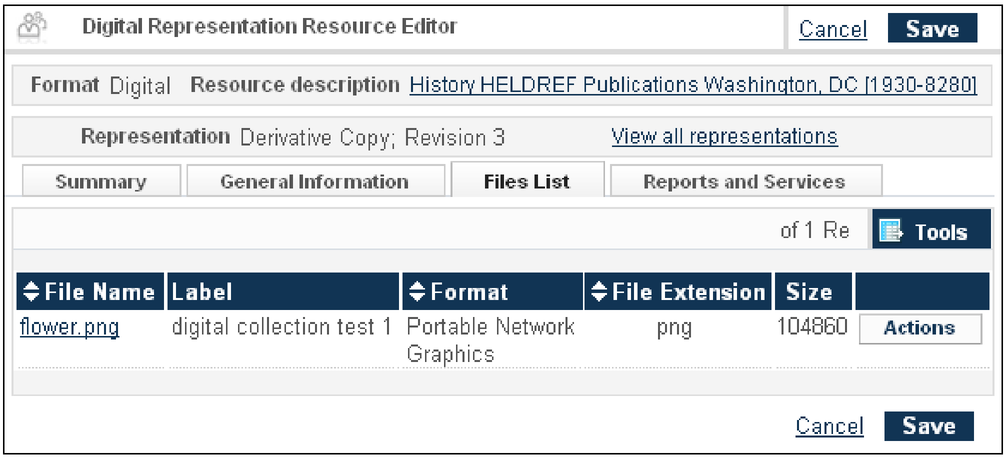


Figure 332: Digital Representation Resource Editor

5 Click the **Files List** tab.

6 Select **Actions > Edit** for a file.

The Digital File Resource Editor opens.

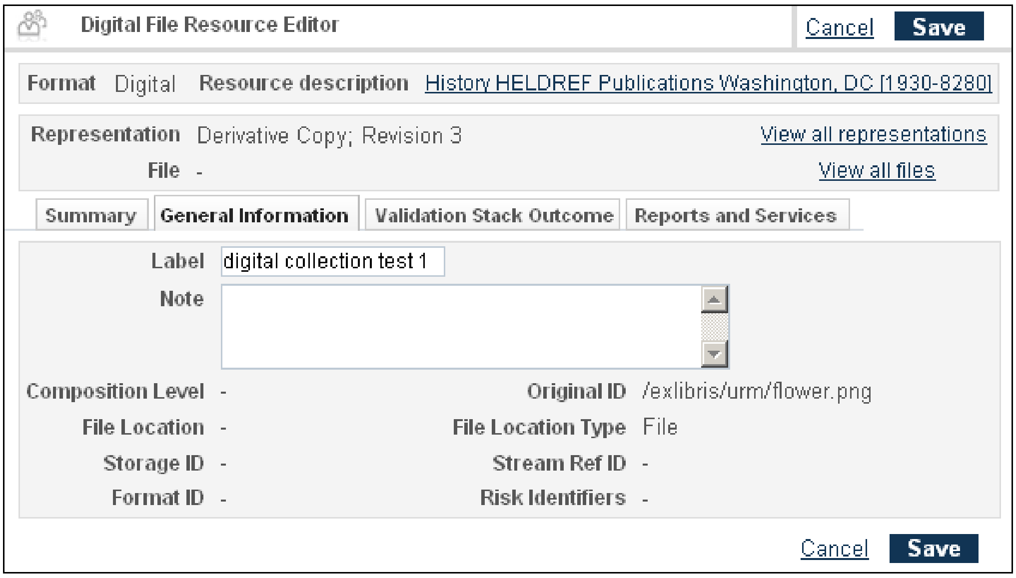


Figure 333: Digital File Resource Editor

7 Click the **General Information** tab.

8 Add a display label or any additional notes for this file.

9 Click **Save**.

Adding Digital Representations

If a new digital representation is produced for a title, it is necessary to add the representation to the title in Alma so that it can be viewed by end users.

To add a digital representation:

1. Select **Add Digital Representation** from the **Resource Management** menu.

   The Representation Details page opens.

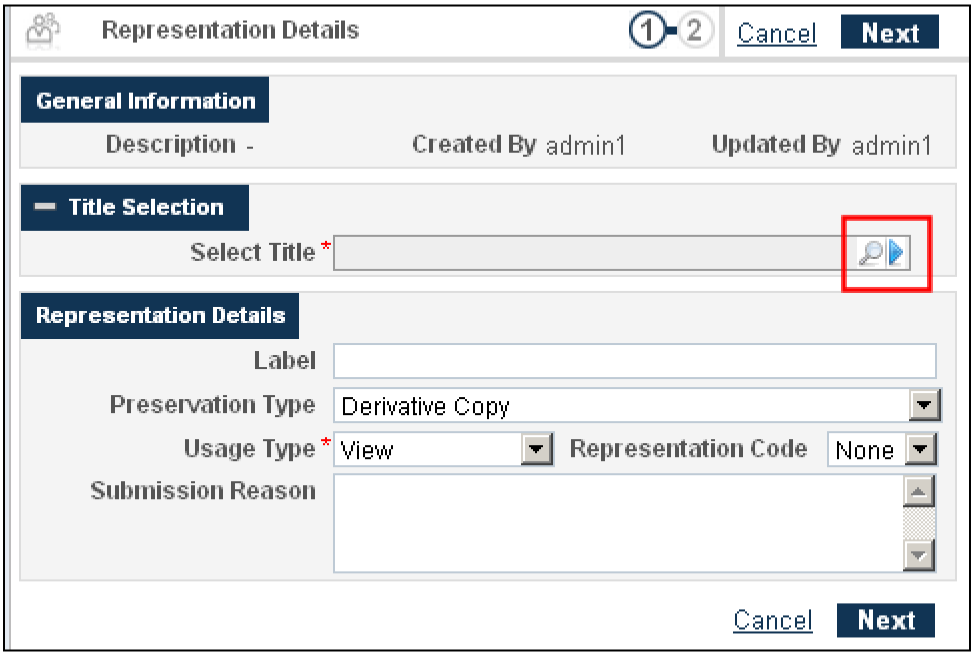


Figure 334: Representation Details Page - Step 1

2. Click the blue arrow in the **Select Title** field.

   The Repository Search page opens.

3. Search for the title for which you want to add a representation. For more information, see **Using the Alma Repository Search** on page 18.

   The brief results display for the digital title.

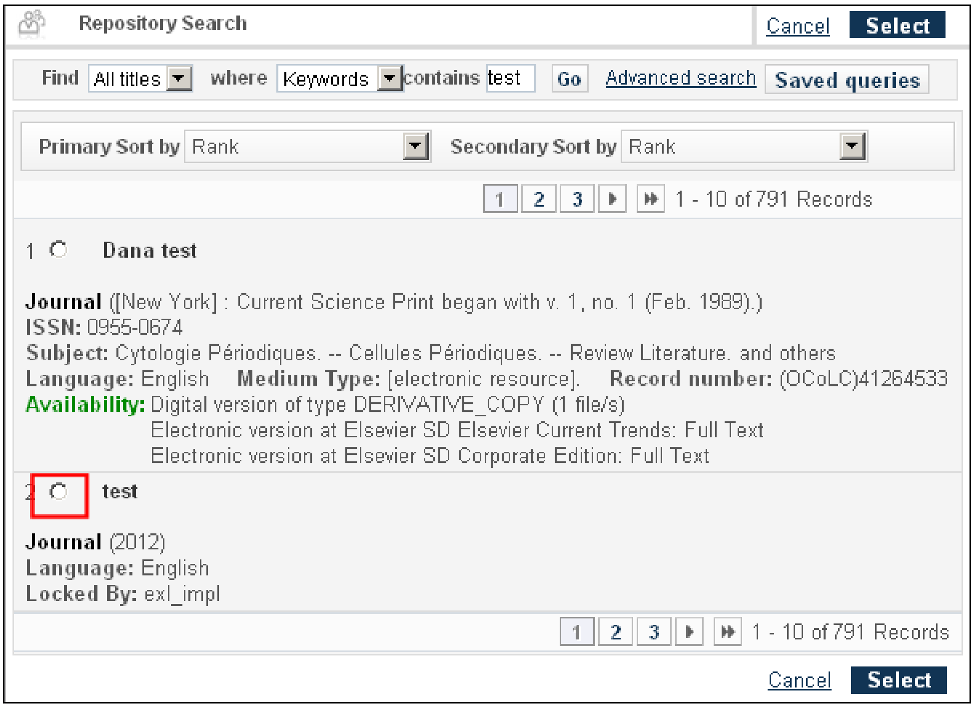


Figure 335: Repository Search Results

4 Select the radio button next to the title and click **Select**.

The Representation Details page reopens and places the selected title in the **Select Title** field.

5 In the **Representation Details** section, enter the optional metadata information as described in the following table.

Table 53. Optional Representation Details Fields

Field	Description
Label	Enter the display label for the representation.
Preservation Type	Select the preservation type from the drop-down list. The valid values are **Derivative Copy**, **Modified Master**, and **Preservation Master**.
Representation Code	Differentiates between the resolutions of derivative digital representations. The valid values are **High**, **Medium**, **Low**, and **None**.
Usage Type	Currently not used by the system.
Submission Reason	Enter the reason for submitting this representation.

6 Click **Next**.

The Upload Files page opens.

7 Select the upload method and then upload the digital files for the representation:

- **Load files using the applet** – Uploads multiple files at a time:

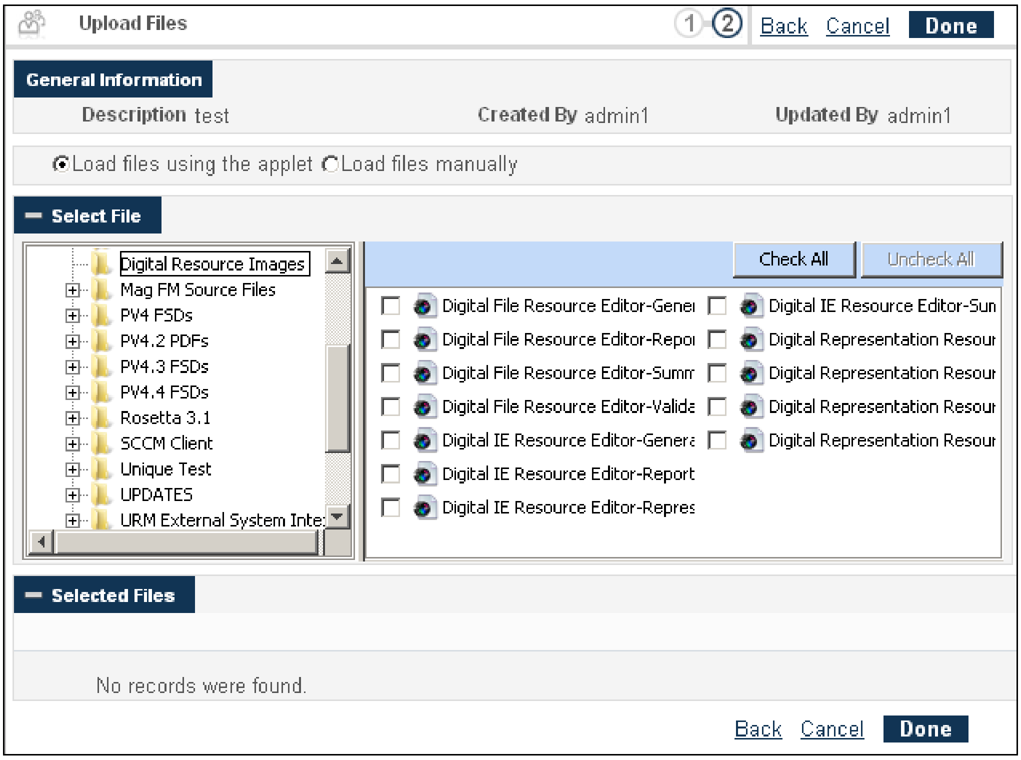


Figure 336: Load Files Applet Option

a In the left pane, select the folder that contains the digital files.

b In the right pane, select the digital files to upload.

c Click **Send**.

d If the files are located in multiple folders, return to step **a** to upload from another folder.

- **Load files manually** – Uploads one file at a time:

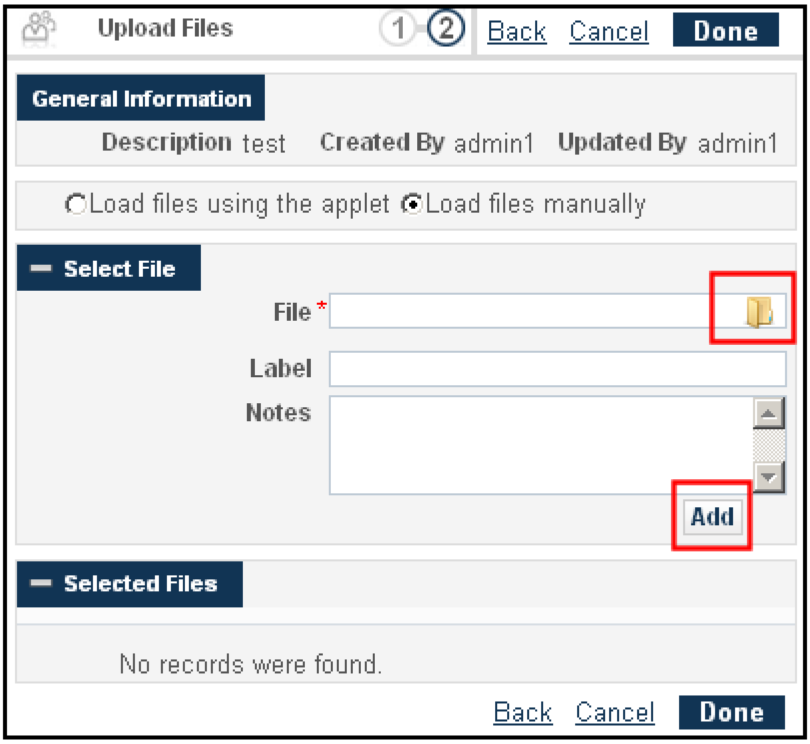


Figure 337: Load Files Manually Option

a In the **File** field, click the folder icon to open the Choose File to Upload page.

b Select the file and click **Open**.

The Choose File Folder closes and the selected file displays in the **File** field.

c Enter an optional label and note.

d On the Upload Files page, click **Add**.

The selected file displays in the **Selected Files** section.

e If the representation contains multiple files, return to step a to upload another digital file.

8 Click **Done**.

Deleting Digital Inventory, Representations, and Files

Alma allows you to delete digital inventory at the following levels:

- Inventory – See **Deleting a Title's Digital Inventory** on page 437). In addition, you can delete digital inventory for a set of titles (see **Deleting Digital Inventory from a Set of Titles** on page 441).
- Representation – See **Deleting a Digital Representation** on page 438.
- File – See **Deleting a Digital File** on page 439.

Deleting a Title's Digital Inventory

This method deletes a title's digital inventory (which includes all representations and files). During the deletion process, you may decide whether to keep the bibliographic record if the title has no physical, electronic, and digital inventory.

To delete a title's digital inventory (including all representations and files):

1. Perform a repository search for the digital title that you want to delete.
2. Click the **Edit** link in the title's results to open the record's details on the Digital IE Resource Editor page.
3. On the Reports and Services tab, click **Delete IE** under the **Services** section.

Figure 338: Digital IE Resource Editor - Delete All Digital Representations

During the deletion process, you may receive the following confirmation messages:

- **Digital inventory has representations. Delete anyway?** – Click **Confirm** if you want to continue deleting the digital title.
- **Handling bibliographic records without inventory** – This indicates that the title has no physical, electronic, and digital inventory. Specify one of the following options to handle the bibliographic record for the title:
  - **Delete** – deletes the bibliographic record
  - **Do nothing** – retains the bibliographic record
  - **Suppress** – retains the bibliographic record and suppresses the record from discovery

Deleting a Digital Representation

This method deletes all files in a digital representation. During the deletion process, you may decide whether to keep the bibliographic record if the title has no physical, electronic, and digital inventory.

To delete a digital representation (including all files):

1 Perform a repository search for the digital title that you want to update.

2 Click the **Edit** link in the title's results to open the record's details on the Digital IE Resource Editor page.

3 On the Representations tab, click **Actions > Delete** next to the representation that you want to delete.

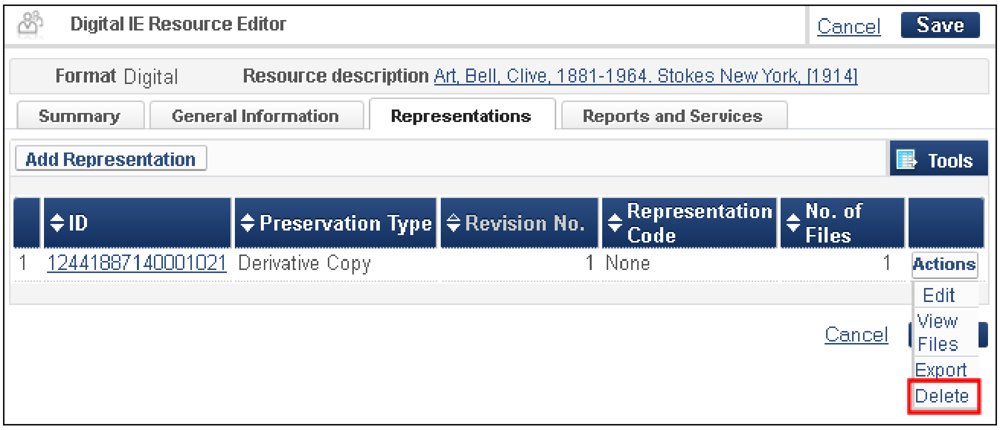


Figure 339: Digital IE Resource Editor - Delete a Digital Representation

During the deletion process, you may receive the following confirmation messages:

- **Representation contains files. Delete anyway?** – Click **Confirm** if you want to continue deleting the digital representation.
- **Handling bibliographic records without inventory** – This indicates that the title has no physical, electronic, and digital inventory. Specify one of the following handling options: **Delete**, **Do nothing**, or **Suppress**.

Deleting a Digital File

This method deletes a single file in a digital representation. During the deletion process, you may decide whether to keep the following objects:

- the digital representation if it has no files
- the bibliographic record if the title has no physical, electronic, and digital inventory

To delete a digital file:

1 Perform a repository search for the digital title that you want to update.

2 Click the **Edit** link in the title's results to open the record's details on the Digital IE Resource Editor page.

3 On the Representations tab, click **Actions > View Files** next to the representation that you want to update.

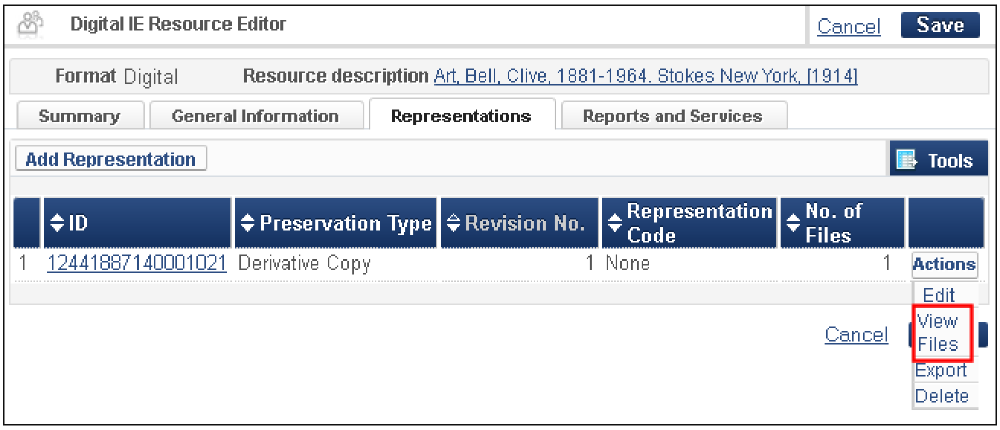


Figure 340: Digital IE Resource Editor - View Digital Files

4 On the Digital Representation Resource Editor page, click **Actions > Delete** next to the file that you want to delete.

Figure 341: Digital Representation Resource Editor - Delete Digital File

During the deletion process, you may receive the following confirmation messages:

- **Delete file?** – Click **Confirm** if you want to continue deleting the file.
- **Last file of representation was deleted. Do you want to delete the representation?** – Click **Confirm** if you want to also delete the representation.

- **Handling bibliographic records without inventory** – This indicates that the title has no physical, electronic, and digital inventory. Specify one of the following handling options: **Delete**, **Do nothing**, or **Suppress**.

Deleting Digital Inventory from a Set of Titles

This method uses the **Withdraw remote representations** job to delete all of the local and remote digital objects belonging to a set of titles that you specify. By default, the bibliographic records remain intact in your repository, whether you have the objects deleted or not.

To run the job for deleting digital objects:

1 From the Alma main menu, follow the path to the Create Job wizard (**Administration > Manage Jobs > Run a Job**).

2 Use the Filter to narrow the list of jobs down to **Withdraw**.

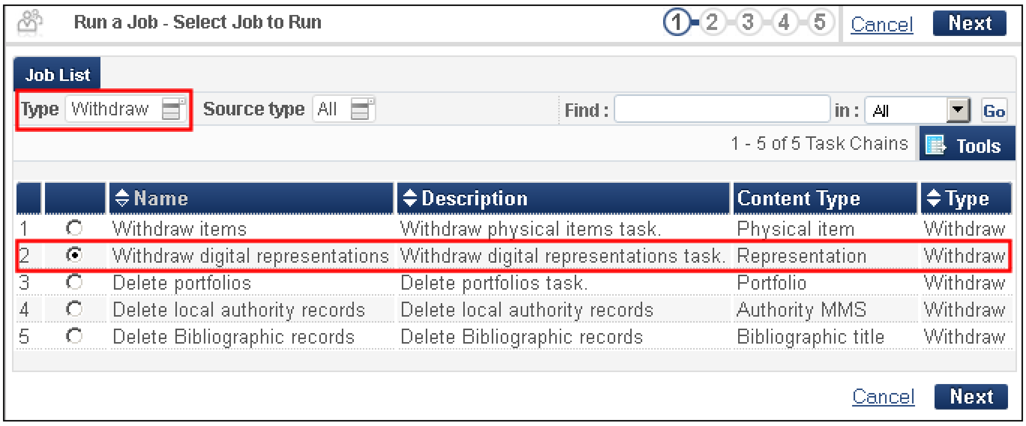


Figure 342: Select Job from Withdraw Type

3 Select **Withdraw digital representations** and click **Next**.

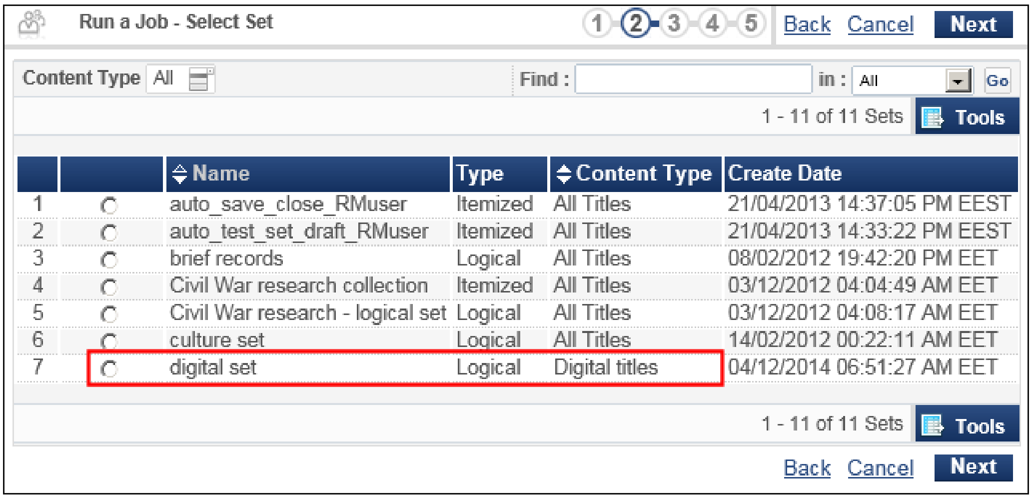


Figure 343: Select Set on Which to Run Job

4 Select the set on which you want to run the job deleting digital objects. Click **Next.**

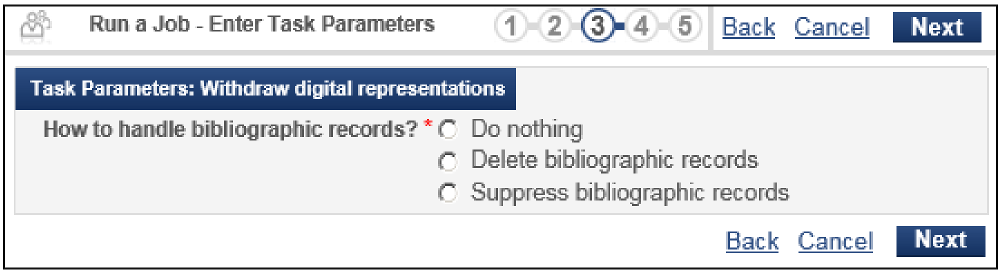


Figure 344: Task Parameters

5 On the Run a Job - Enter Task Parameters page, select one of the following options:

- **Do nothing** – retain the bibliographic records.
- **Delete bibliographic records** – remove the bibliographic records from the repository.
- **Suppress bibilographic records** – retain the bibliographic records, but suppress them from discovery.

6 Click **Next**.

7 On the Run a Job - Job Details and Schedule page, enter a name for the job and the schedule on which you want the job to run. Click **Next**.

The Run a Job - Review and Confirm page opens.

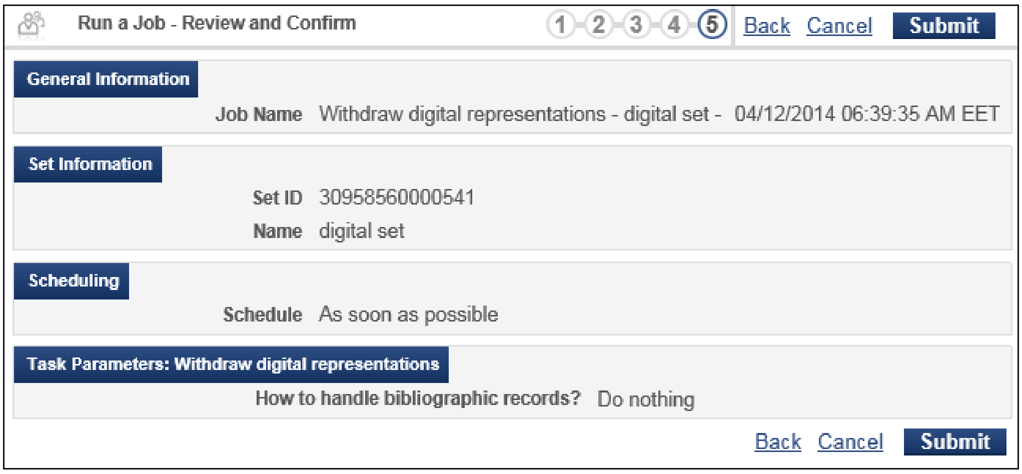


Figure 345: Review and Confirm Job Terms

8 Review the information on the Review and Confirm page. If everything is correct, click **Save**. To go back and change something, use the **Back** button.

Running Reports and Services

The Reports and Services tab for each digital resource editor allows you to run various reports and services. The following table lists the reports and services available per digital resource level.

Table 54. Reports and Services

Report/Service	Editor
Reports:	
Generate Full Administrative Metadata Report for this resource	All digital resource editors
Report of events where this item is involved	All digital resource editors
Services:	
Export IE	Digital IE Resource Editor
Delete IE	Digital IE Resource Editor
Export Representation	Digital Representation Resource Editor

To run a report:

1 From the digital resource editor, click the **Reports and Services** tab.

In the following example, the Reports and Service tab opens for the Digital IE Resource Editor.

Figure 346: Reports and Services Tab - Digital IE Resource Editor

2 In the **Reports** section, click the name of the report.

In the following example, the **Generate Full Administrative Metadata Report for this resource** report was selected.

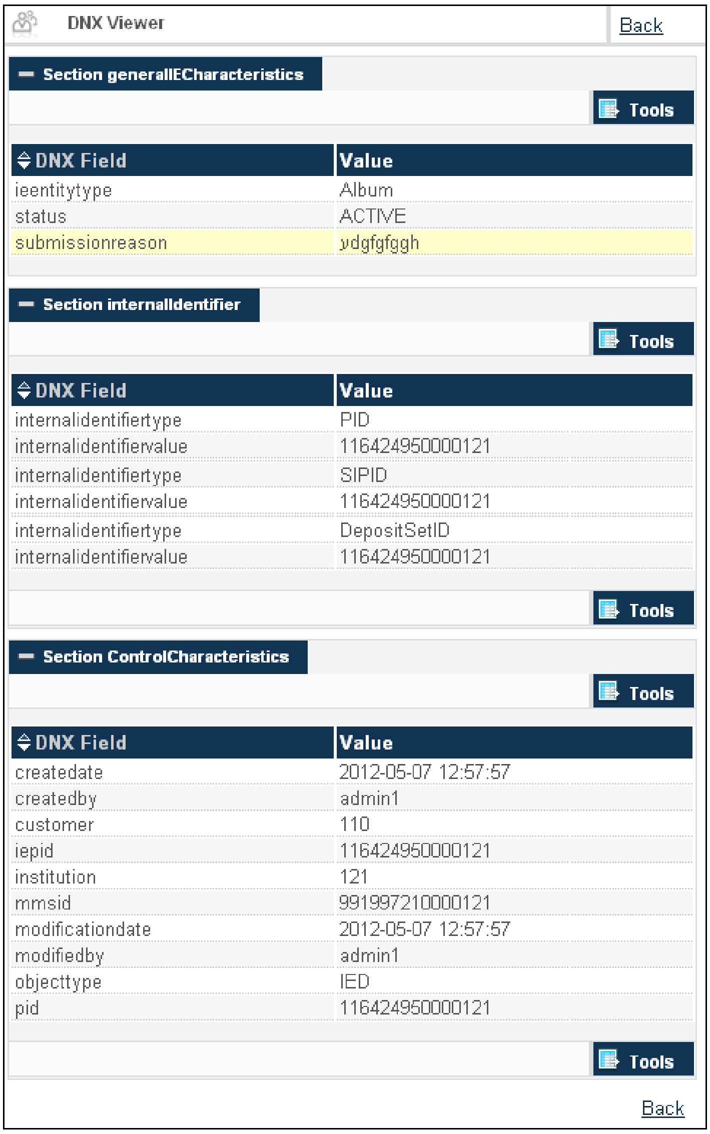


Figure 347: DNX Viewer - Full Metadata Report for Title

3 Click **Back** to return to the Reports and Services tab.

To run a service:

1 From the digital resource editor, click the **Reports and Services** tab.

In the following example, the Reports and Service tab opens for the Digital IE Resource Editor.

Figure 348: Reports and Services Tab - Digital IE Resource Editor

2 In the **Services** section, click the name of the service.

3 Click **Back** to return to the Reports and Services tab.

Managing Physical Resources

Alma allows you to create and maintain physical resources using various editors and jobs. For details on how to manage your physical inventory, see the following sections:

- **Adding Physical Resources** on page **447**
- **Using Prediction Patterns (Inventory Creation)** on page **453**
- **Updating Item-Level Information** on page **465**
- **Performing Withdrawals** on page **471**
- **Performing Global Changes on Holdings Records** on page **477**
- **Performing Global Changes on Item-Level Information** on page **479**
- **Managing Physical Holdings Records (Moves/Deletes)** on page **484**

Adding Physical Resources

PERMISSIONS:

To add and/or manage physical resources, you must have the following roles:

- Physical Inventory Operator
- Physical Inventory Operator Extended (required for delete operations)

You can add physical items to your inventory using the Quick Cataloging pages. The following types of items can be added:

- Existing items – **Adding an Existing Physical Item** on page **447**
- New items – **Adding a New Book or Journal Article** on page **449**

Adding an Existing Physical Item

If the item already exists in the library and you only need to catalog it, use the option for adding an existing item.

NOTE:

You must know the item's barcode to complete this procedure.

To add an existing item to your inventory:

1 From the Choose Holdings Type dialog box (**Resource Management > Create Inventory > Add Physical Item**), select the **Existing** option and click **Choose**.

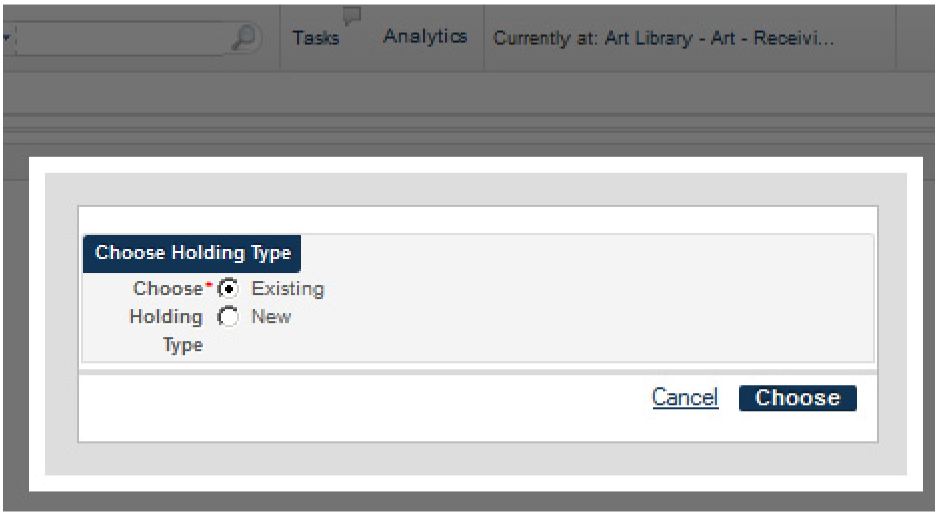


Figure 349: Choose Holdings Type

The Quick Cataloging page for existing resources opens.

Figure 350: Quick Cataloging for Existing Physical Items

2 In the Resource Information section, find the title of your item by either:

- Typing all or part of the title, clicking the magnifying glass icon, and selecting your complete title from the drop-down list
- Clicking the find (arrow) icon that opens a Repository search form for you to search and select your title

When you select your title, the **Title** field populates with your selection. The Library and Location fields are populated based on the Title selection.

3 Enter the barcode for the item and, optionally, add the following remaining parameters:

- Description – The text you enter will display in the list of holdings for the item.
- Material Type – Use the magnifying glass drop-down menu or the find (arrow) icon to find and select a value for Material Type. The material type manifests itself only in Primo's Get It andDetails tabs. For information on customizing the labels of the material types, refer to **Configuring Physical Item Material Type Descriptions** on page 740.
- Item Policy – Use the magnifying glass drop-down menu or the find (arrow) icon to find and select a value for Item policy.

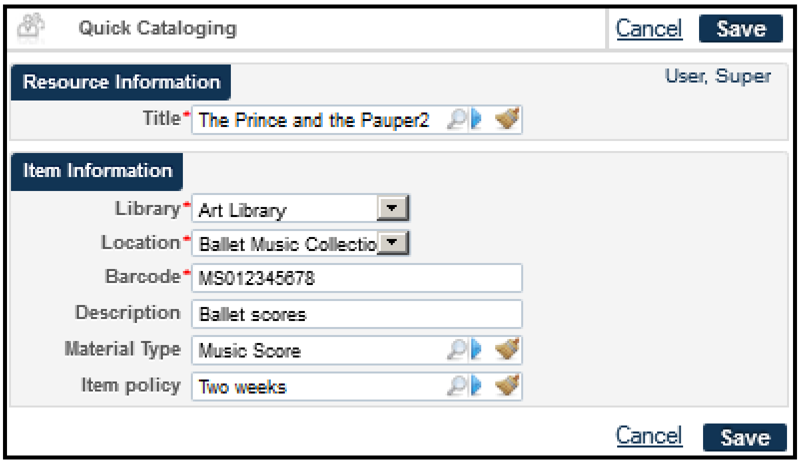


Figure 351: Quick Cataloging for Existing Physical Item

4 Click **Save**. The item is added to the inventory. The Quick Cataloging page closes, and the Alma home page opens.

Adding a New Book or Journal Article

If the item you want to add to your inventory is new, use the New holdings option to add it to your inventory.

To add a new physical item to the inventory:

1 From the Choose Holdings Type dialog box (**Resource Management > Create Inventory > Add Physical Item**), click the **New** option.

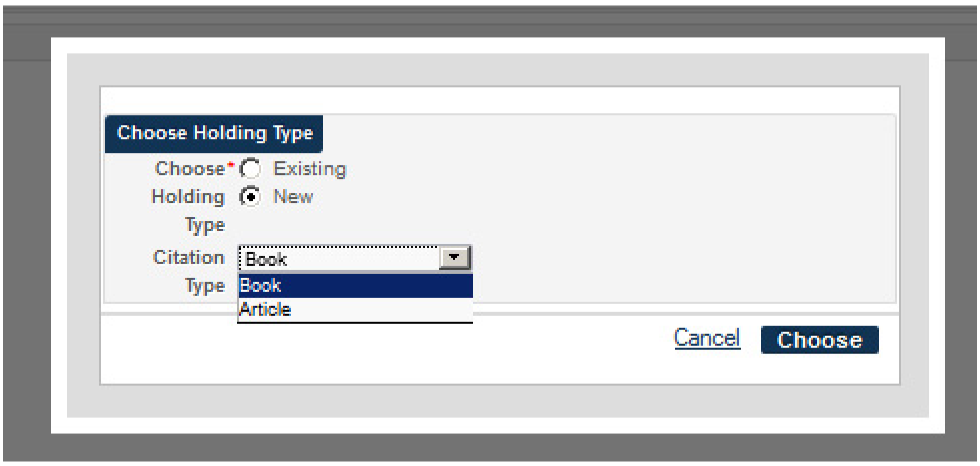


Figure 352: New Holdings Type and Citation Type Selection

2 Select the **Citation Type** (**Book** or **Article**) from the drop-down menu and click **Choose**. The Quick Cataloging form opens. Parameters differ slightly between the book and journal entries.

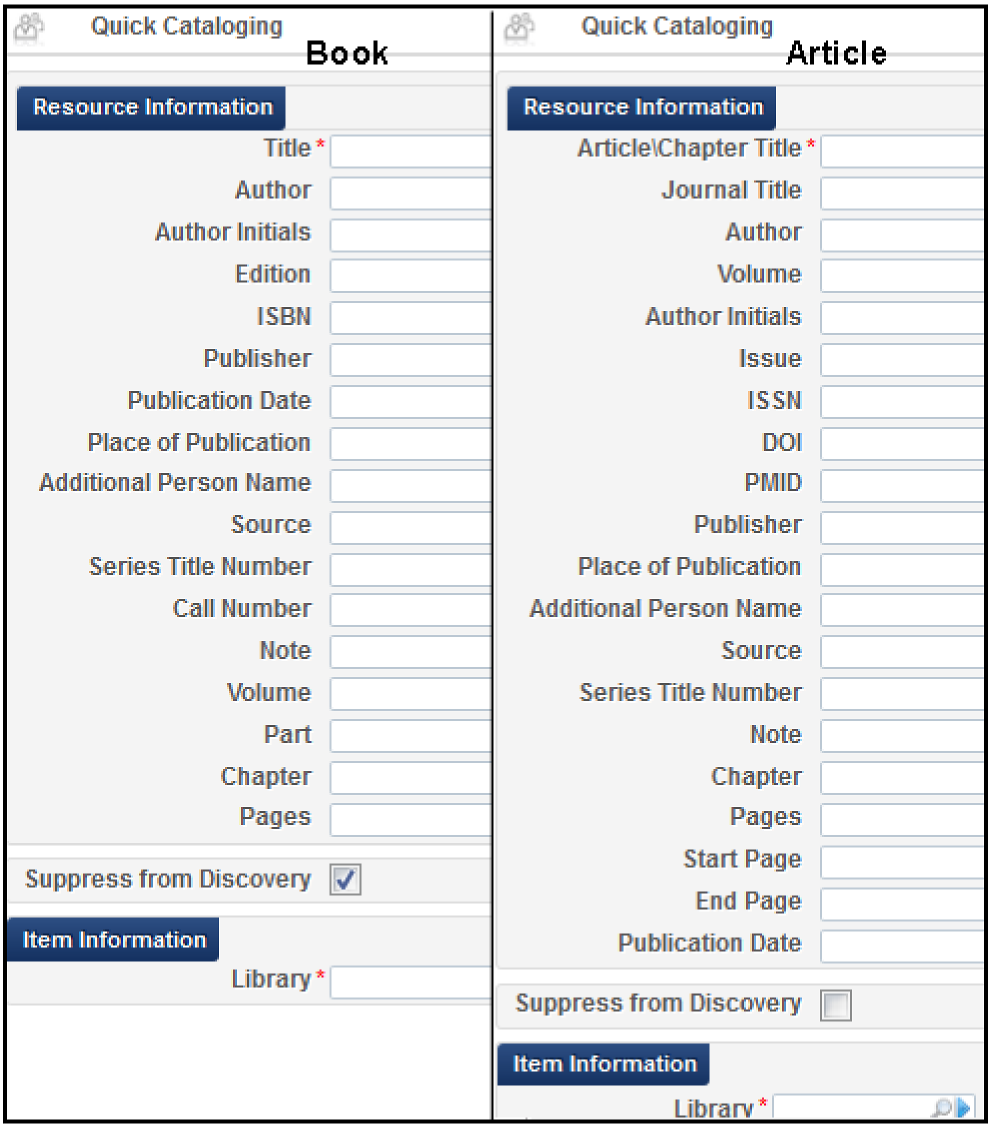


Figure 353: Quick Cataloging Form for Book (Left Side) or Article (Right Side)

3 Enter values in the Resource Information fields for the book or article using the table below for information about the parameters.

Table 55. Resource Information Fields

Field	Description
Title/Article/Chapter Title (Required)	The title of the book, article, or chapter
Journal Title (article)	The title of the journal that contains the article
Author	The author of the book or article
Publisher (book)	The name of the publisher of this edition of the book
Year (book)	Year of publication of this edition of the book
Edition (book)	Edition number of the book
Volume (article)	The volume number of the journal that contains the article
Issue (article)	The issue number of the journal that contains the article
ISBN/ISSN	The International Standard Book Number (ISBN) or International Standard Serial Number (ISSN) that identifies the book or article
Place of publication	The place in which the book or article was published
Additional person name	The name of an additional contact
Call number	The call number of the book. Indicates the library shelf on which the book is located
Note	A field for notes, as needed
Chapter	The chapter number in the journal that contains the article
Pages	The page numbers in the journal that contain the article
Year	The year the journal was published
Suppress from discovery	Select to block the bibliographic record from publishing to Primo.

4 In the Item Information section, type and select the name of the library where you want the item to be located, or click the arrow icon to open a list of the libraries and select one. Once you select a library, the page refreshes and additional fields appear below the **Library** field, including one additional required field. Enter the values for the Item Information section using the table below that provides a description of the parameters.

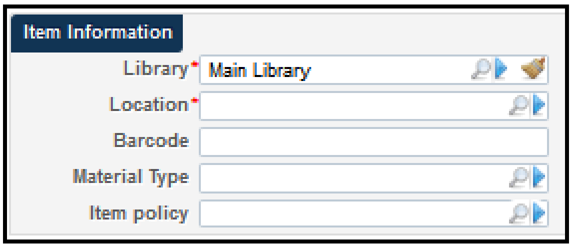


Figure 354: Additional Fields After Library Selection

Table 56. Item Information Fields

Field	Description
Library	The name of the library where the item is stored. Click the arrow to see a list of all existing available libraries. To change the library after entering it, click the broom icon to delete it and repeat the selection.
Location	The location within the library where the physical item is kept. Use the drop-down menu feature or click the arrow to open a list of available locations for this library.
Barcode	The barcode of the item.
Material Type	The material type of the item. Use the drop-down menu or the arrow to open a list of possible types. The material type manifests itself only in Primo's Get It/ Details tabs. (For information on customizing the material type labels, see **Configuring Physical Item Material Type Descriptions** on page 740.)
Item Policy	The check-out policy for the item, as in term length and other restrictions. Use the drop-down menu or the arrow to open a list of available policies.

5 Click **Save**. Alma saves the Quick Catalog record and opens a Repository Search screen with the entry just added as the search result.

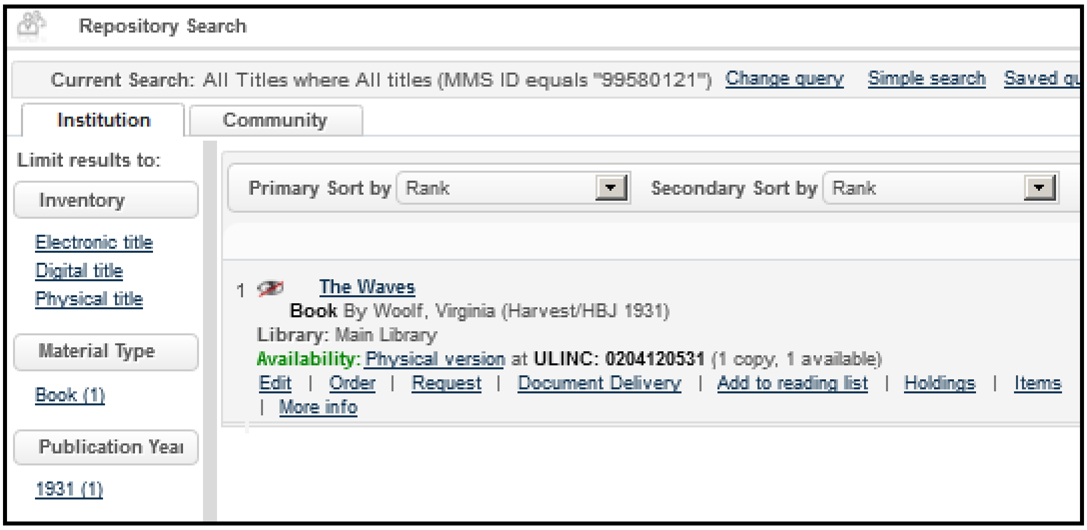


Figure 355: New Physical Item After Saving

Using Prediction Patterns (Inventory Creation)

Alma provides prediction pattern support to enable you to more easily manage serials. With prediction pattern support, it is possible to create serial items in advance of their receive date based on a prediction template.

This capability uses the 853-855 holdings record fields for the predicted item information such as enumeration, chronology, date, and so forth. With this feature, Alma provides many predictive pattern templates from which you can select to enter the 853-855 field information.

Once you have created the predicted items, they can be viewed using the Acquisitions Received Items List to manage their receipt.

To create a holdings record with predictive pattern content:

1. Locate the holdings record (connected to a physical subscription order type) to which you want to add the predictive pattern information and open it in the MD Editor.

   (The order provides the vendor **Subscription interval** information that is used in combination with the **Next Predicted's Item Information** (see below) to calculate the expected arrival date information.)

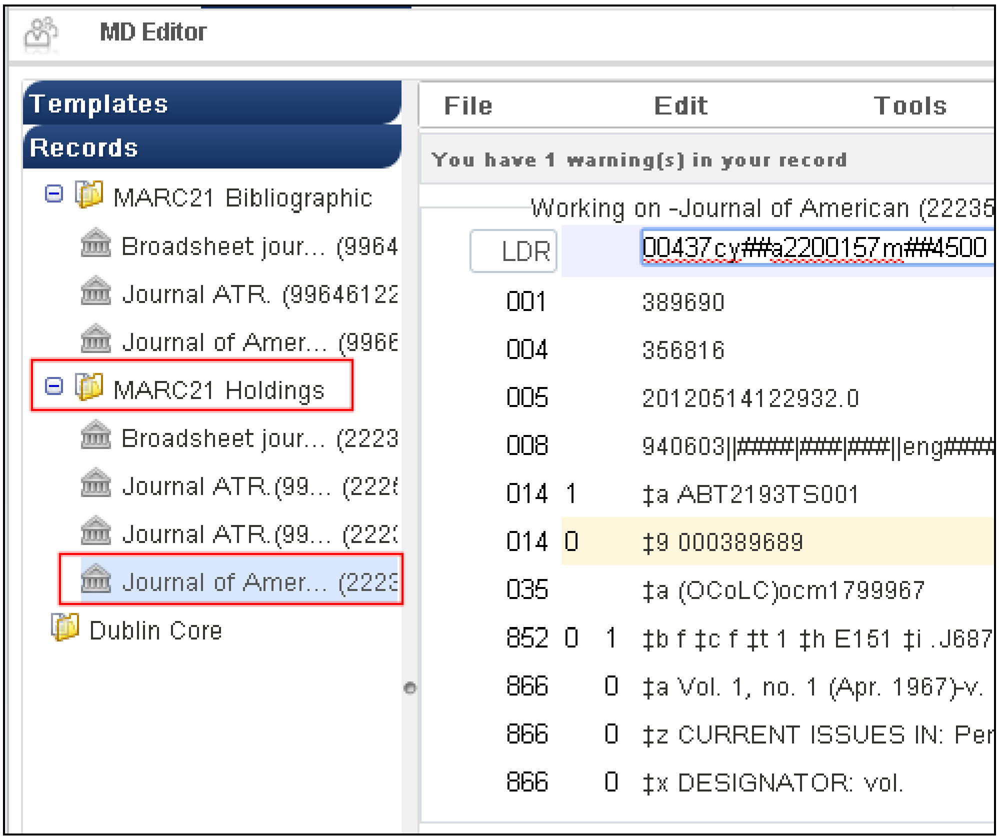


Figure 356: Open Holdings Record

2 Select **Edit > Expand from Template**, select a relevant predictive pattern template that fits your requirements from the ones provided in Alma, and click **OK**.

Since the journal used in this procedure is a quarterly publication, the **Serial prediction quarterly months** template is selected.

Figure 357: Quarterly Publication

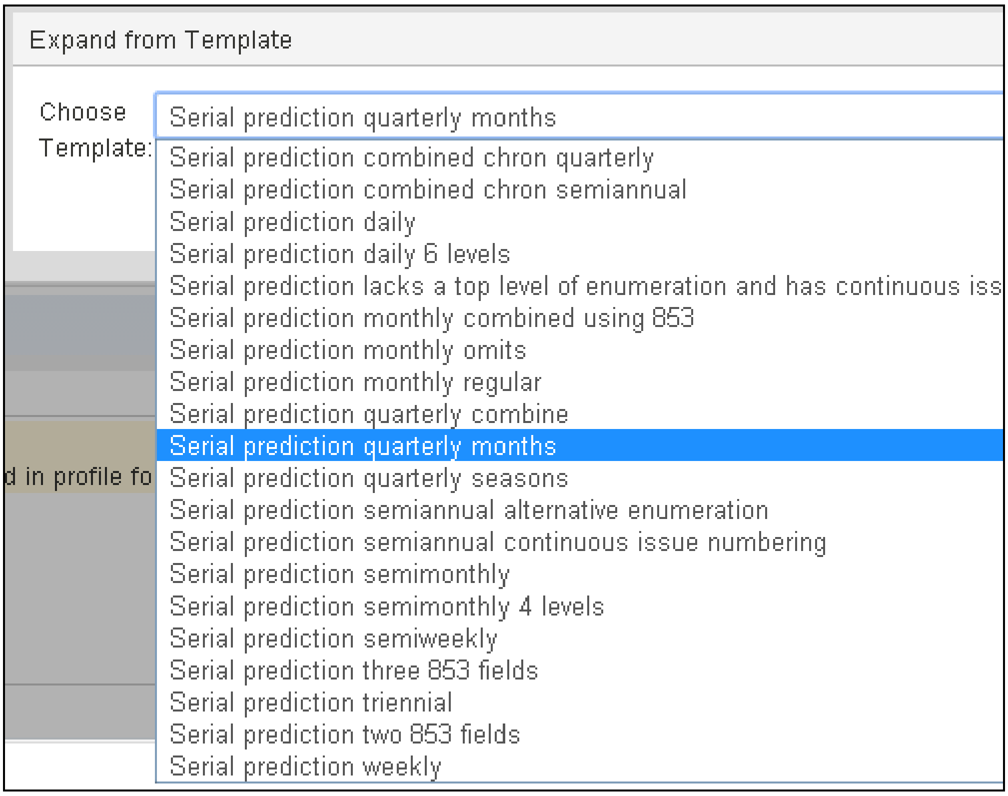


Figure 358: Expand from Template Predictive Pattern Options

The system adds an 853 field row (or 854/855 field depending on which template you selected) to the holdings record and a 590 field row that contains a description of the template.

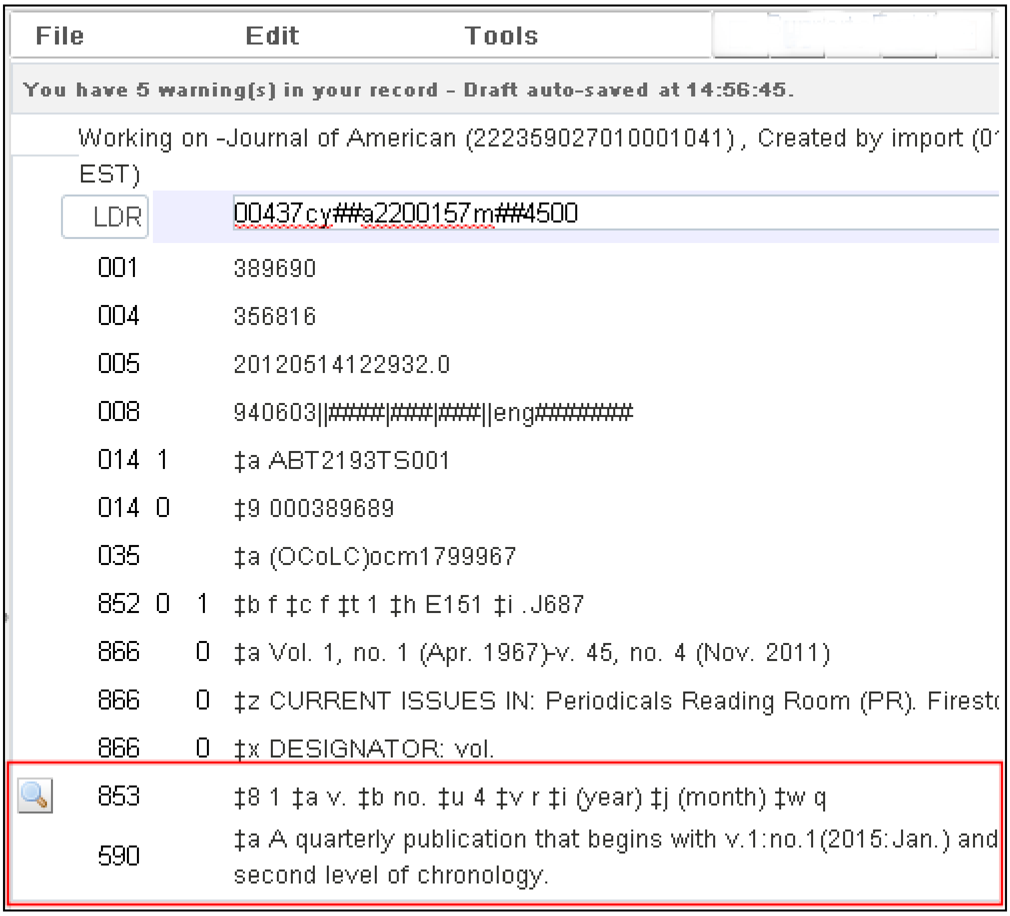


Figure 359: 853/590 Rows Added to the Holdings Record

Optionally, you can manually enter the 853/854/855 field. You can also create your own custom prediction pattern template, a new one or by duplicating an existing prediction pattern template and modifying the duplicate.

3 Click the magnifying glass icon in the 853 (or 854/855) row to open the form with the next predicted item's information. You can also click **F3** to open the form when the 853 (or 854/855) is the active row or you can select **Tools > MARC21 Holdings > Next predicted item's information**. (You can also use F3 to open the form when you have manually entered the 853/854/855 field and no magnifying glass icon is displayed.)

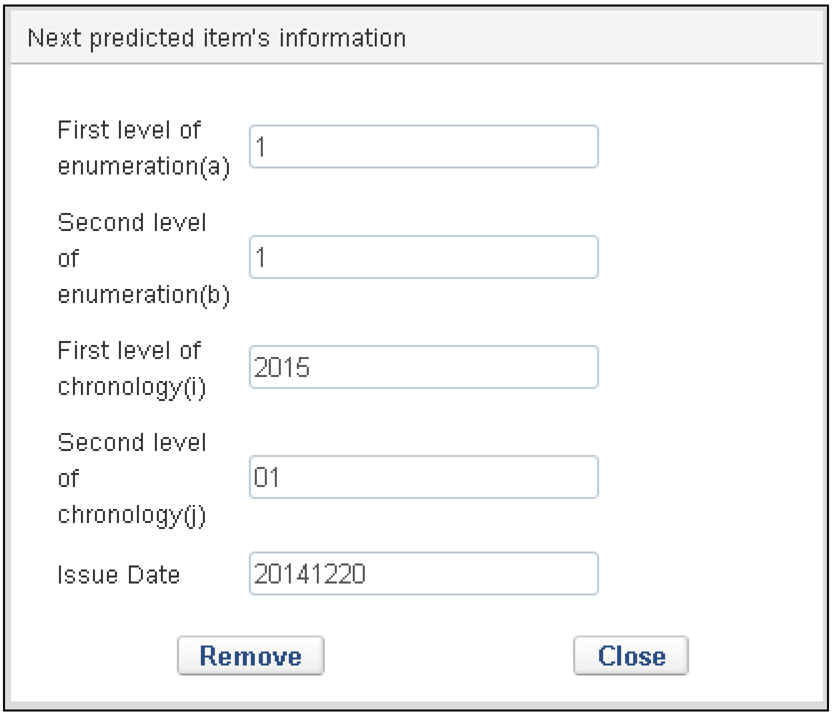
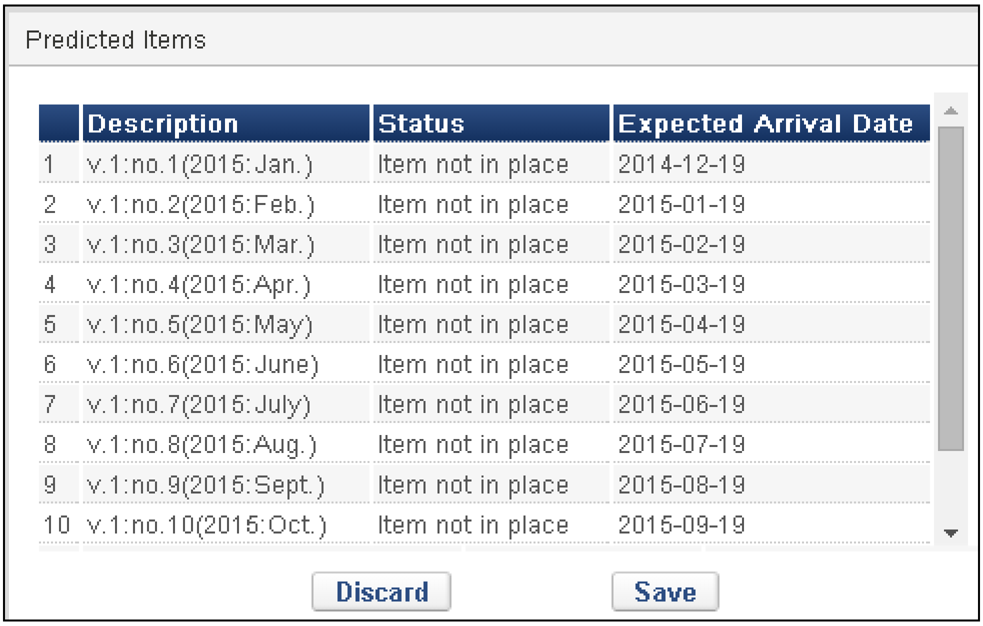


Figure 360: Next Predicted Item's Information

4. Make any changes you may require for the next predicted item and click **Close**. Your entries on this form determine the beginning of the prediction pattern starting with the next predicted item. Clicking **Remove** clears the form.

5. Select **Tools > MARC21 Holdings > Open predicted item** to view the pattern that Alma has created for this holdings record. The predicted pattern that is created includes the expected arrival date (refer to the figure below).

   Each prediction cycle is for one year. If you want to create predicted items for more than one year, you can repeat the **Open predicted item** step.



Predicted Items

	Description	Status	Expected Arrival Date
1	v.1:no.1(2015:Jan.)	Item not in place	2014-12-19
2	v.1:no.2(2015:Feb.)	Item not in place	2015-01-19
3	v.1:no.3(2015:Mar.)	Item not in place	2015-02-19
4	v.1:no.4(2015:Apr.)	Item not in place	2015-03-19
5	v.1:no.5(2015:May)	Item not in place	2015-04-19
6	v.1:no.6(2015:June)	Item not in place	2015-05-19
7	v.1:no.7(2015:July)	Item not in place	2015-06-19
8	v.1:no.8(2015:Aug.)	Item not in place	2015-07-19
9	v.1:no.9(2015:Sept.)	Item not in place	2015-08-19
10	v.1:no.10(2015:Oct.)	Item not in place	2015-09-19

Discard Save

Figure 361: Predicted Items Created

6 Click **Save** to save the predicted items that have been created, or click **Discard** if you do not want to save the predicted items. This closes the Predicted Items form.

7 Click the **Save Record** icon when you have completed making your changes.

To view the holdings changes that you have made after creating predicted items:

1 In the MD Editor, open the bibliographic record that has the holdings for which you created the predicted items.

2 Click **View Inventory** (**Tools > MARC21 Bibliographic > View Inventory**).

The predicted items that you created increment the **No. of Items** total that displays on the **Holdings** tab in the MD Editor (**Tools > MARC Bibliographic > View Inventory**) for the bibliographic record of this continuous holdings record.

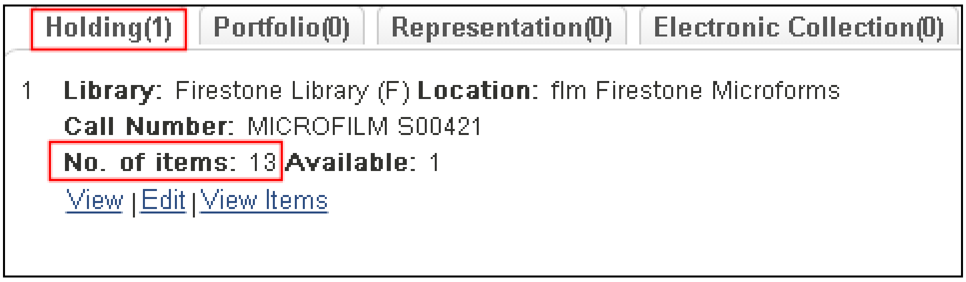


Figure 362: Number of Items Increments for Bibliographic Record Holdings

3 Click **View Items**.

The four predicted items of the cycle (quarterly per year) have been created with no receiving date (because they have not yet been received).

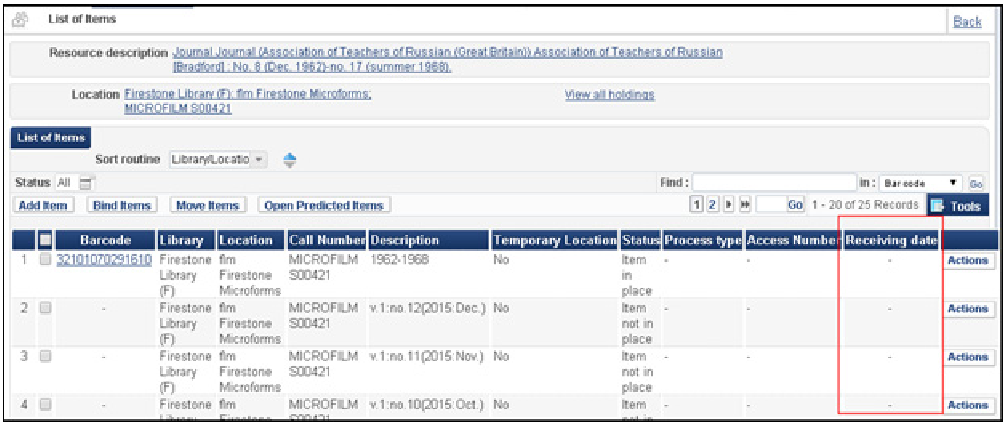


Figure 363: List of Items Page - No Receiving Dates

While viewing the details of the List of Items page, also observe the **Open Predicted Items** button that can be used to create another cycle of predicted items.

4 For one of the predicted items, select **Actions > Edit** to open the Physical Item Editor page and observe the **Expected receiving date** that has been set by the prediction pattern.

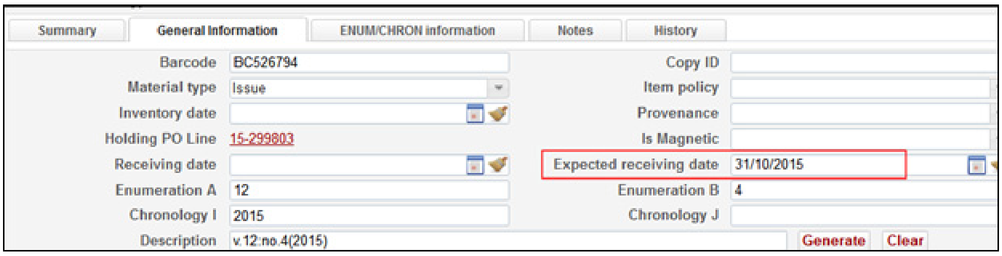


Figure 364: Expected Receiving Date

To create additional predicted items using the Open Predicted Items button from the List of Items page using Repository Search:

1 Using Repository Search, enter the search criteria for the record to which you want to create an additional cycle of predicted items, and click the **Items** link.

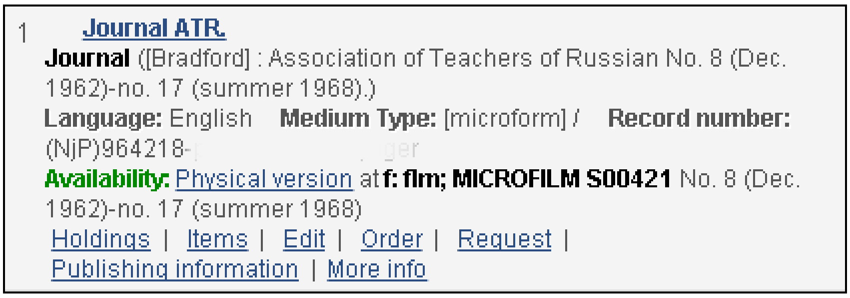


Figure 365: Search Results

The List of Items Page opens with the new **Open Predicted Items** button.

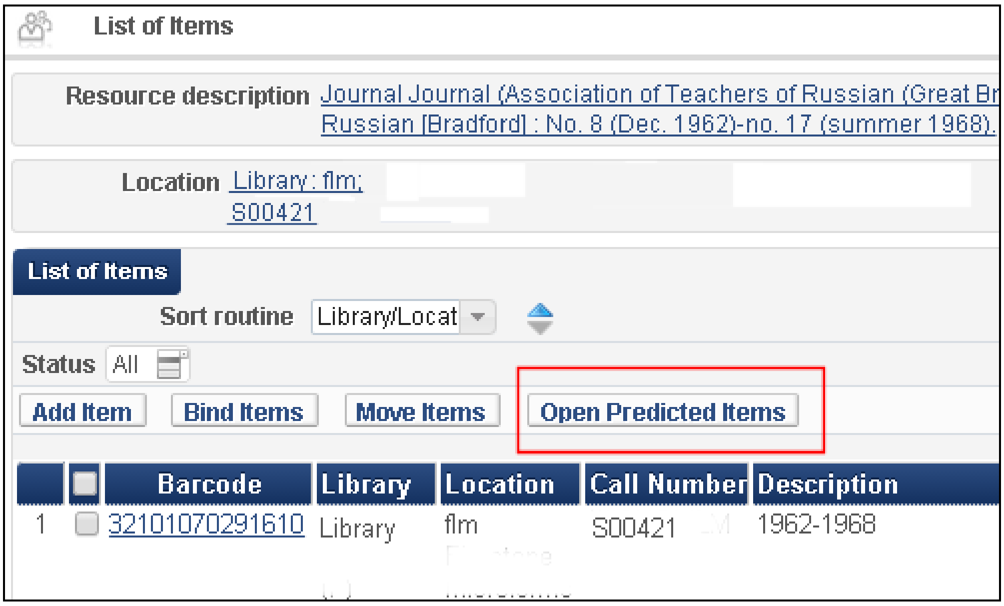
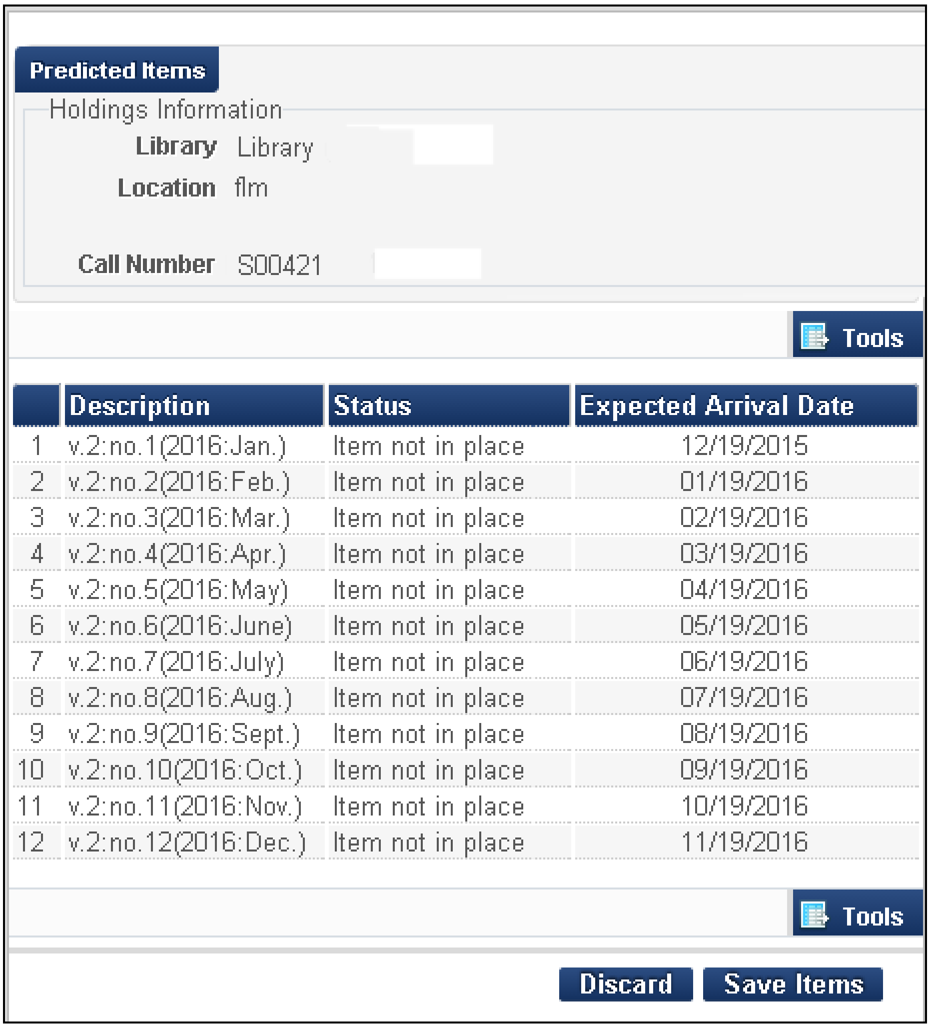


Figure 366: List of Items Page for Holdings with Predicted Items

2 Click **Open Predicted Items**. The list of new Predicted Items opens.



Predicted Items

Holdings Information

Library Library

Location flm

Call Number S00421

Tools

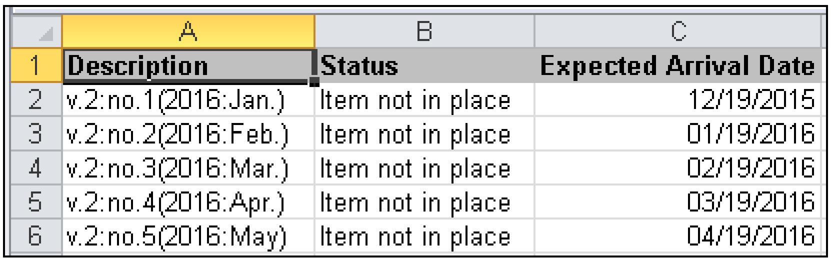
	Description	Status	Expected Arrival Date
1	v.2:no.1(2016:Jan.)	Item not in place	12/19/2015
2	v.2:no.2(2016:Feb.)	Item not in place	01/19/2016
3	v.2:no.3(2016:Mar.)	Item not in place	02/19/2016
4	v.2:no.4(2016:Apr.)	Item not in place	03/19/2016
5	v.2:no.5(2016:May)	Item not in place	04/19/2016
6	v.2:no.6(2016:June)	Item not in place	05/19/2016
7	v.2:no.7(2016:July)	Item not in place	06/19/2016
8	v.2:no.8(2016:Aug.)	Item not in place	07/19/2016
9	v.2:no.9(2016:Sept.)	Item not in place	08/19/2016
10	v.2:no.10(2016:Oct.)	Item not in place	09/19/2016
11	v.2:no.11(2016:Nov.)	Item not in place	10/19/2016
12	v.2:no.12(2016:Dec.)	Item not in place	11/19/2016

Tools

Discard Save Items

Figure 367: Predicted Items List from Repository Search Results List of Items Page

The **Tools** feature for this list provides you the option to view/save the list in Excel format.



	A	B	C
1	Description	Status	Expected Arrival Date
2	v.2:no.1(2016:Jan.)	Item not in place	12/19/2015
3	v.2:no.2(2016:Feb.)	Item not in place	01/19/2016
4	v.2:no.3(2016:Mar.)	Item not in place	02/19/2016
5	v.2:no.4(2016:Apr.)	Item not in place	03/19/2016
6	v.2:no.5(2016:May)	Item not in place	04/19/2016

Figure 368: Predictive Pattern List in Excel

3 Click **Save Items** to save the predicted items and close the list.

4 Click **Back** to return to your search results page.

To process/manage receiving predicted items:

1 Open the **Receive New Material** page (**Acquisitions > Receiving and Invoicing > Receive**), and select the **Continuous** tab.

2 Filter the **Receive New Material** page to locate the PO line that contains the predicted item(s) you want to receive.

3 For the PO line containing the predicted item(s), select **Actions > Manage Items**. The Received Items List page opens.

Figure 369: Received Items List Page

When receiving and managing items, you can tell which items have already arrived and which are still waiting to arrive by reviewing the **Date Received** column.

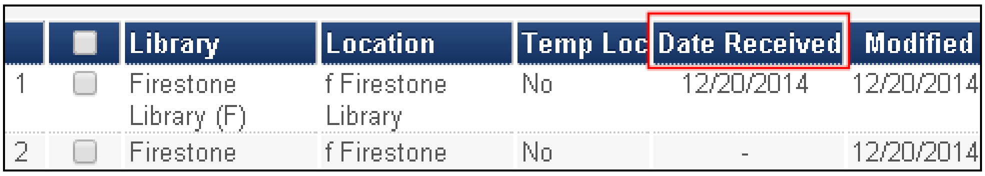


Figure 370: Date Received Column

4 Use the **Sort routine**, **Receiving status**, and **Location** options in the PO Line Items section to organize and locate the predict item(s) to be received.

   a Select **Receiving date** from the drop-down list for **Sort routine**.

   b Select **Not Received** for the **Receiving Status**.

   c Select the specific location/library for **Location**.

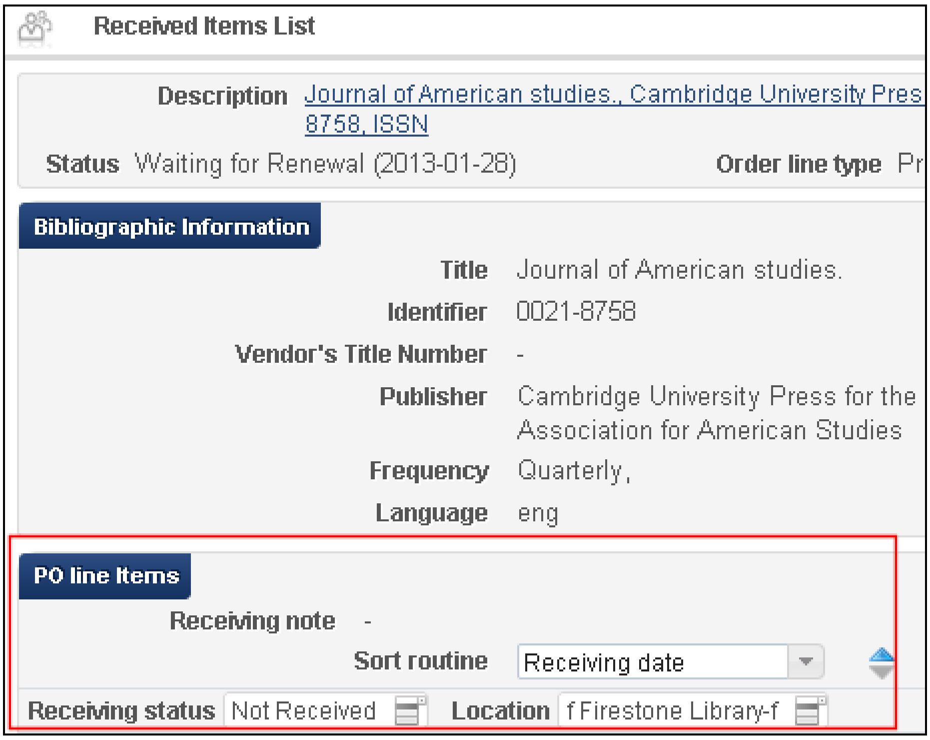


Figure 371: Sort/Filter Options Selected

5 Select **Actions >Receive** for a specific predicted item, or select the check boxes for multiple rows, and click the **Save and Receive** button that allows you to save and receive multiple items.

6 Repeat the receiving steps until you have completed receiving the predicted item(s).

Updating Item-Level Information

The Physical Item Editor enables staff to update item-level information for physical items.

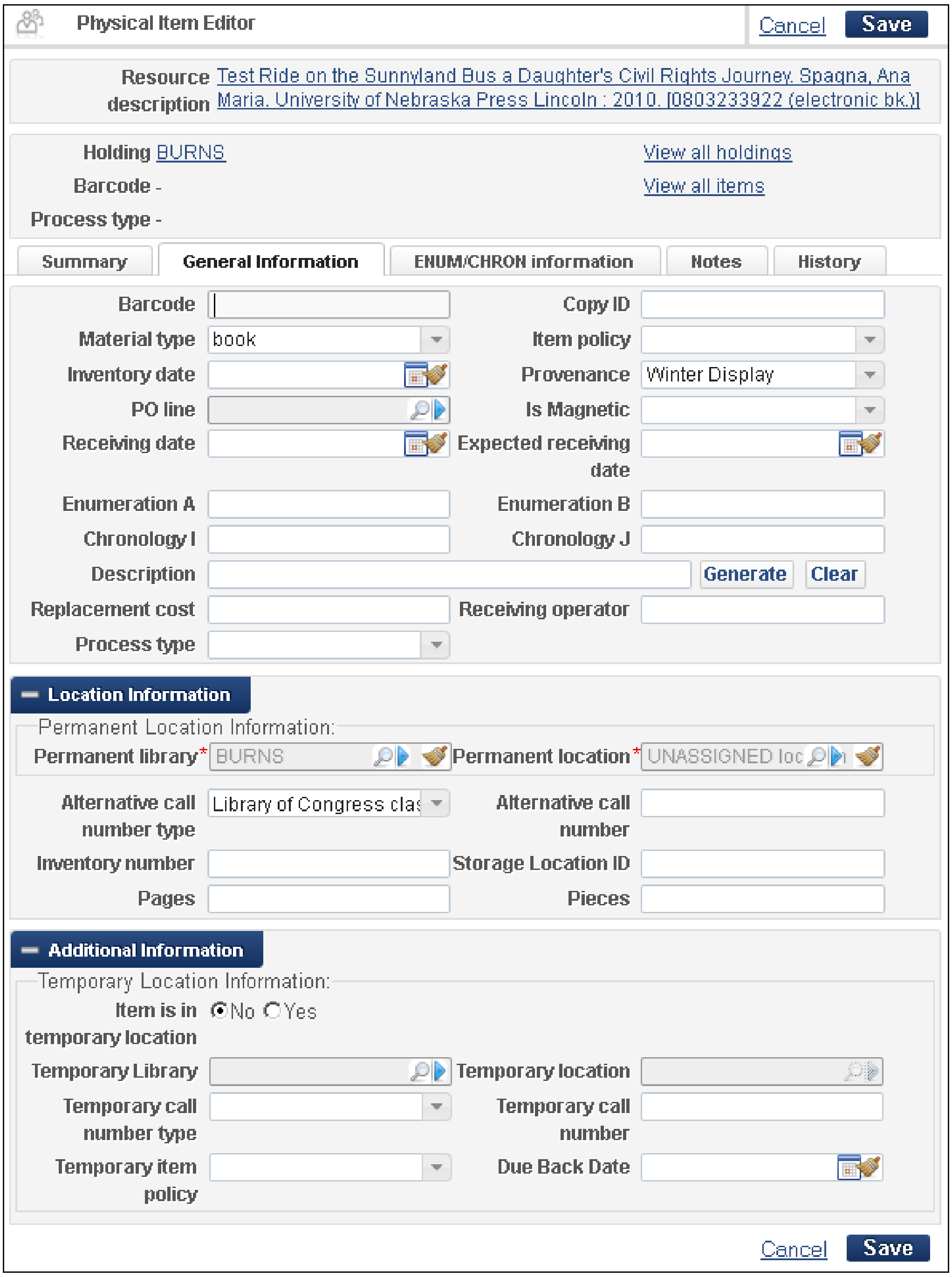


Figure 372: Physical Item Editor Page - General Information Tab

To update item-level information for a physical item:

1. Search for the physical item that you want to update. For more information, see **Using the Alma Repository Search** on page 18.

NOTE:
You must be searching for a physical item—not title—for this procedure to have the outcomes described below.

Results for your search are returned in brief form.

2. Click **Edit** for the item you want to update. The Physical Item Editor page opens to the item you selected.
3. If it is not already open, select the **General Information** tab and refer to the following table for updating information for each field.

Table 57. Physical Item Editor Page - General Information Tab

Field	Description
Barcode	The item's barcode.
Copy ID	The item's copy ID, used to identify individual copies of the same title when multiple copies exist at the same location.
Material Type	The item's physical form, such as a book or CD-ROM. Select from the predefined drop-down list. Note that the material type manifests itself only in Primo's Get It/Details tabs. (For information on customizing the material type labels, see **Configuring Physical Item Material Type Descriptions** on page 740.)
Item Policy	The item's override policy for loan rules. Defines the conditions under which a request for this item can be fulfilled. Select from items in the drop-down list (predefined in Fulfillment Configuration > Physical Fulfillment > Item Policy).
Inventory date	*Not currently in use.* The date on which inventory was last checked. Date can be selected from the calendar drop-down box.
Provenance	The item's origin, as selected from options in the drop-down menu.
PO Line	Clicking the **Find** icon opens a list of PO lines for the item. Use the Filter and Find tools to find the PO line for the item. Select one and click the **Select** button.
Is Magnetic	Indicates whether the item contains a magnet which can cause it to be damaged when scanned by a self-check machine.

Table 57. Physical Item Editor Page - General Information Tab

Field	Description
Receiving date	The date the material was actually received/activated for the first time. Click the **Receiving date** box and select the receiving date from the calendar dialog box.
Expected receiving date	The date the item was expected to be received.
Enumeration A	The main level of enumeration—usually the volume.
Enumeration B	The second level of enumeration, such as quarter.
Chronology I	The main level of chronology—usually the year.
Chronology J	The second level of chronology—usually the month.
Description (Generate/ Clear)	System-generated description based on entries in the Enumeration and Chronology fields above. Click **Generate** to have the system enter the Description or **Clear** to remove the description. To configure a description template, see **Configuring Description Templates** on page 725.
Replacement cost	The charge administered to the patron if the item is lost.
Receiving operator	The Operator who received the item
Process type	Displays the configured work order types. When selecting a value in this field, the **At** field displays the location in which the work order is performed. After saving the item, the following information displays on the Repository Search page: ■ **Process type**: Indicates the selected work order type ■ **Status**: Value is **Item not in place** Work order information also displays on the Resource Request Monitoring page (see **Monitoring Requests and Work Orders** in the *Alma Fulfillment Guide*). To remove an existing work order from an item, clear this field when accessing the Physical Item Editor page from the **Edit** link for an item. The **Status** of the item displays on the Repository Search page as **Item in place**. **VIDEO:** For more information about assigning a work order process to an item, see the *Assign a Process to an Item* video (2:54 mins).

Table 57. Physical Item Editor Page - General Information Tab

Field	Description
At	Select a work order department for the work order that displays in the **Process type** field. After saving the item, value of this field (that is, the location of the item) displays on the Repository Search page as the **At:** field value.
Location Information:	
Permanent Library	The library that permanently houses the item. To change the library, click the Find magnifying glass and browse for a new holdings library, then select it as the permanent library.
Permanent Location	The name of the item's permanent location within the permanent library. To change the location, click the Find magnifying glass and browse for another location, then select it as the permanent location.
Alternative Call Number Type	An alternative identification number type to the call number. Select, for example, Library of Congress, Dewey Decimal, or a shelving control number from the drop-down list.
Alternative Call Number	The ID number for the item that corresponds to the alternative call number type.
Inventory Number	*Not currently in use.*
Storage Location ID	The ID number of the location where the item is stored.
Pages	The item's number of pages.
Pieces	The item's number of pieces.
Additional Information	
Item is in Temporary Location (Yes/No)	Indicates if the item is located in a temporary location. When this option is set to `Yes`, it can be reset to `No` for one or more records in a set using the **Change physical items** batch job to process the change and selecting the **Remove temporary item indication** option. Refer to **Performing Global Changes on Item-Level Information** on page 479. **VIDEO:** For more information about modifying this setting using the Change physical items batch job, see the *Remove Temporary Item Location Indicator* video (5:27 mins).

Table 57. Physical Item Editor Page - General Information Tab

Field	Description
Temporary Library	The item's temporary library, selected from the Organizational Lists page.
Temporary Location	The item's temporary location, selected from the Organizational Lists page.
Temporary Call Number Type	The call number type used for the item at the temporary location.
Temporary Call Number	The item's call number when using the temporary call number type at the temporary location.
Temporary Item Policy	The item's temporary override policy. Policies are configured and appear in the drop-down list.
Due Back Date	The date the item is due back from the lender.

4 Click the **Notes** tab to view/edit notes relating to the item. Refer to the table below for a description of the different types of notes.

Table 58. Description of Item Notes

Note Type	Description
Public note	Contains note content that is displayed in the Primo Get It tab under the Holdings column. Refer to **Displaying Public Notes in the Primo Get It Tab** on page **145**in the *Integrations wtih Primo Guide.*
Fulfillment note	Contains note content that is displayed during the circulation process. For example, the content may contain the statement "Check for discs" to prompt the circulation desk at item checkin.
Internal Notes:	
Internal note 1	Contains note content regarding an item for internal use by Alma staff.
Internal note 2	Contains note content regarding an item for internal use by Alma staff.

Table 58. Description of Item Notes

Note Type	Description
Internal note 3	Contains note content regarding an item for internal use by Alma staff. Specifically, this note may contain content regarding a shipped resource sharing lending item, as sent to Alma by the NCIP source system in the NCIP message's shipping note. The shipping note displays in the following format: **||Shipping Note||<text of shipping note>||Shipping Note||** The shipping note is used by NCIP implementers, such as OCLC Navigator, to update the library system with additional information about shipped resource sharing lending items such as information about the resource itself, the requester, and the locations from where it is requested and is to be picked up.
Statistics Notes:	
Statistics note 1	Contains note content that is exposed in Analytics under **New > Analysis > Physical Items**.
Statistics note 2	Contains note content that is exposed in Analytics under **New > Analysis > Physical Items**.
Statistics note 3	Contains note content that is exposed in Analytics under **New > Analysis > Physical Items**.

5 Select the **History** tab and refer to the following table for information regarding each parameter.

Table 59. Physical Item Editor Page - History Tab

Field	Description
Report type:	
Item changes	This report displays the changes made to the item as visible/editable on the General tab of the Physical Item Editor page. This report identifies the name of the operator who made the change, the date the change was made, the field that was changed, and the before and after values.
Holdings changes	This report displays changes to the library (852 $$b), location (852 $$c), call number type (852 first indicator), call number (852 h, i, j, k, l, m), and accession number. This report identifies the operator name that made the change, the date the change was made, the field that was changed, and the before and after values.

Table 59. Physical Item Editor Page - History Tab

Field	Description
Fulfillment activities	This report displays loan/return activity. It identifies the date the change was made, the action type completed (loan/return), the name of the operator/desk name that made the change, the borrower name, and the borrower ID. In-house loan/usage information displays on the page.

Figure 373: History Tab Report Types

Performing Withdrawals

A withdrawal is the process of removing items from the catalog to ensure that the catalog is up to date and represents only those items that are actually in the collection. Although withdrawn items are not displayed in Alma or published to Primo, Alma also allows librarians and staff users to view a historical record of these items in Analytics reports. (Note that withdrawn items appear as Life Cycle = Deleted in Analytics.)

This section describes the methods that are used to withdraw items:

- **Withdrawing an Item** on page **472**
- **Withdrawing Sets of Items** on page **475**

Withdrawing an Item

PERMISSIONS:

To remove items from the physical inventory, you must have the following role:

- Physical Inventory Operator Extended

Alma allows you to withdraw individual items as needed. While withdrawing an item, you may decide to delete or suppress holdings records that do not have any items. Depending on the settings of the following parameters in the CustomerParameters table (**Resource Management > Configuration Menu > Other Settings**), Alma may also suppress bibliographic records:

- **suppressBibWithDeletedHol** – If set to **true**, Alma will suppress bibliographic records that do not have any holdings records.
- **suppressBibWithSuppressedHol** – If set to **true**, Alma will suppress bibliographic records that only contain suppressed holdings records.

To withdraw an item:

1 Enter the barcode for the physical item in the Persistent Search box. For more information, see **Using the Persistent Search Box** on page **16**.

The Repository Search page opens and displays the brief results for the item.

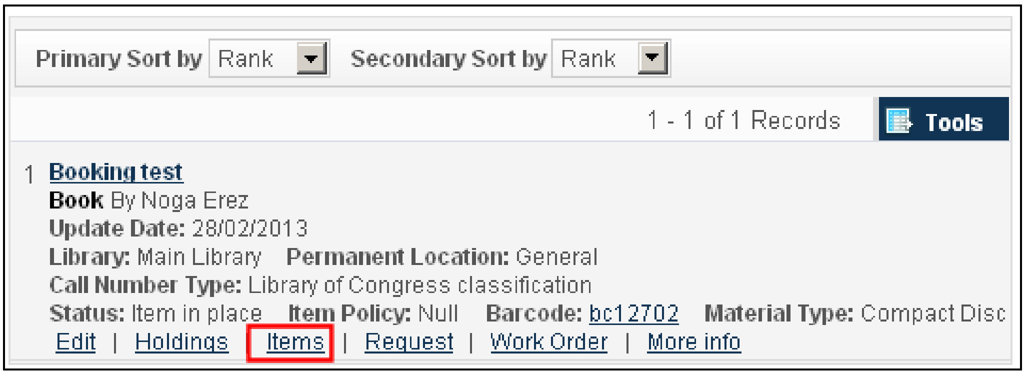


Figure 374: Repository Search Page

2 Click **Items**.

The List of Items page opens if the holdings record contains more than one item.

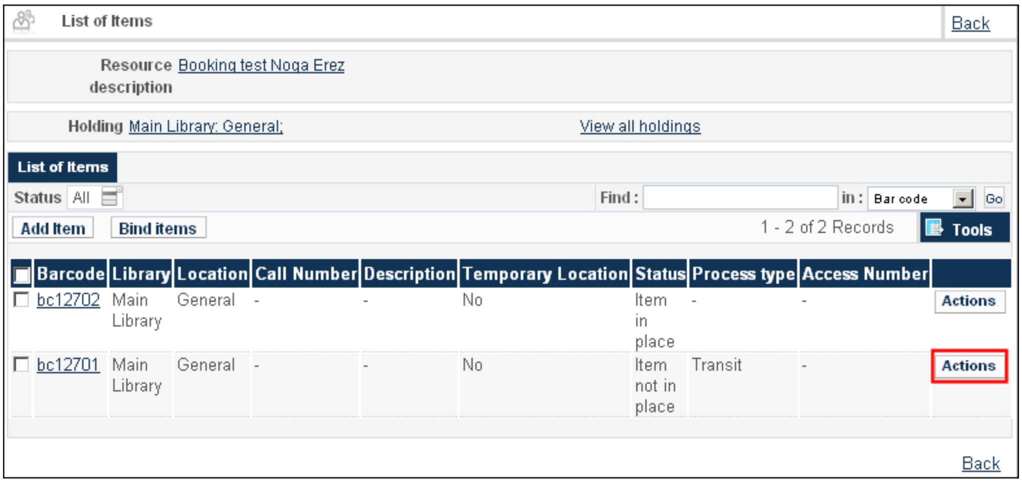


Figure 375: List of Items Page

If the holdings record contains a single item, the Physical Item Editor page will open first. Click **View all items** to display the List of Items page.

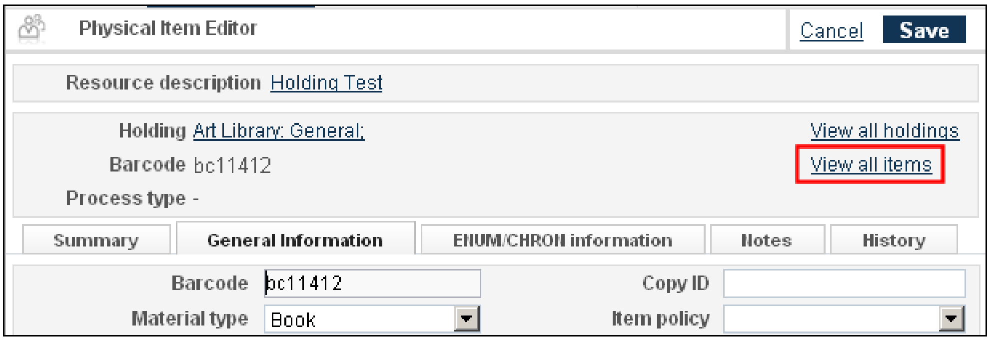


Figure 376: Physical Item Editor Page

3 Select **Actions > Withdraw**.

The Confirmation Message dialog box opens.

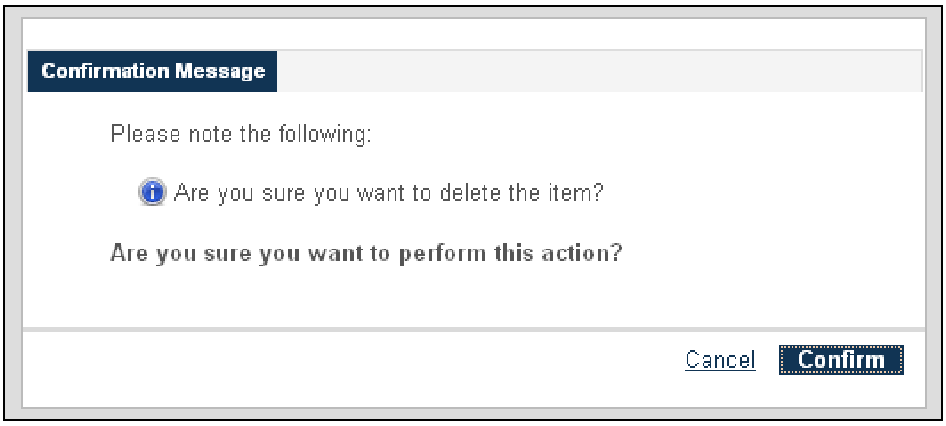


Figure 377: Confirmation Message Dialog Box

4 Click **Confirm**.

If the last item was removed from the holdings record, the Last Item dialog box opens.

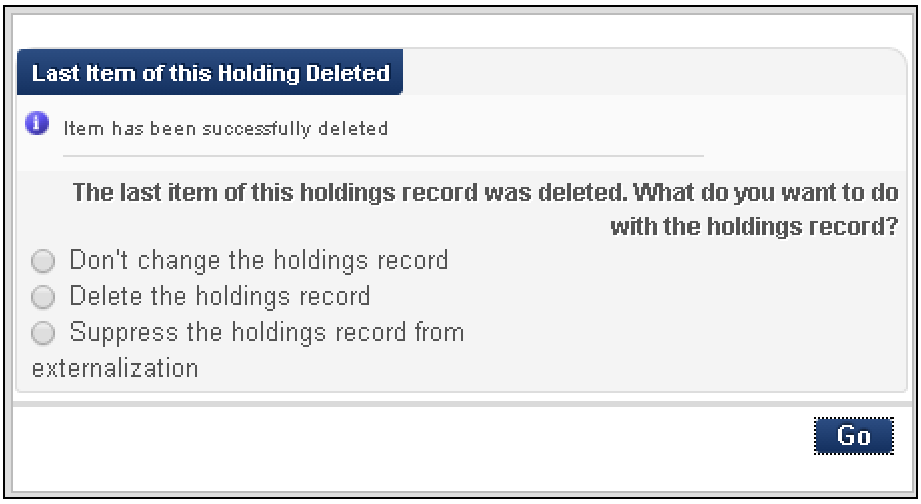


Figure 378: Last Item Dialog Box

Select one of the following options and then click **Go**.

- **Don't change the holdings record** – Select this option if you do not want to withdraw or suppress the holdings record.
- **Delete the holdings record** – Select this option if you want to withdraw the holdings record.
- **Suppress the holdings record from externalization** – Select this option if you do not want to withdraw the holdings record, but you want to prevent the record from displaying in Primo or an external discovery system.

Withdrawing Sets of Items

PERMISSIONS:

To remove items from the physical inventory, you must have the following roles:

- Repository Manager
- Physical Inventory Operator Extended (required for delete operations)

Alma allows you to withdraw items that have been added to a set.

To withdraw a set of items:

1. Create a set of items to withdraw. For more information on creating sets, see **Adding Itemized Sets** on page **84**.
2. Execute the Withdraw job. For more information on running jobs, see **Running Jobs on Defined Sets** on page **305**.
    a. On the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), find the **Withdraw** job using the filters, sort options, and navigation links available.

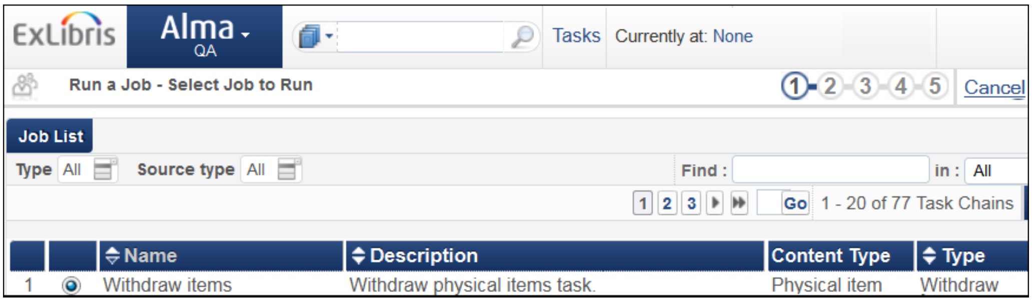


Figure 379: Run a Job – Select Job to Run Page

    b. Select the **Withdraw items** job, and click **Next**.

    The Run a Job - Select Set page opens.

    c. Select the set that you created in the first step and click **Next**.

    The Run a Job - Enter Task Parameters page opens.

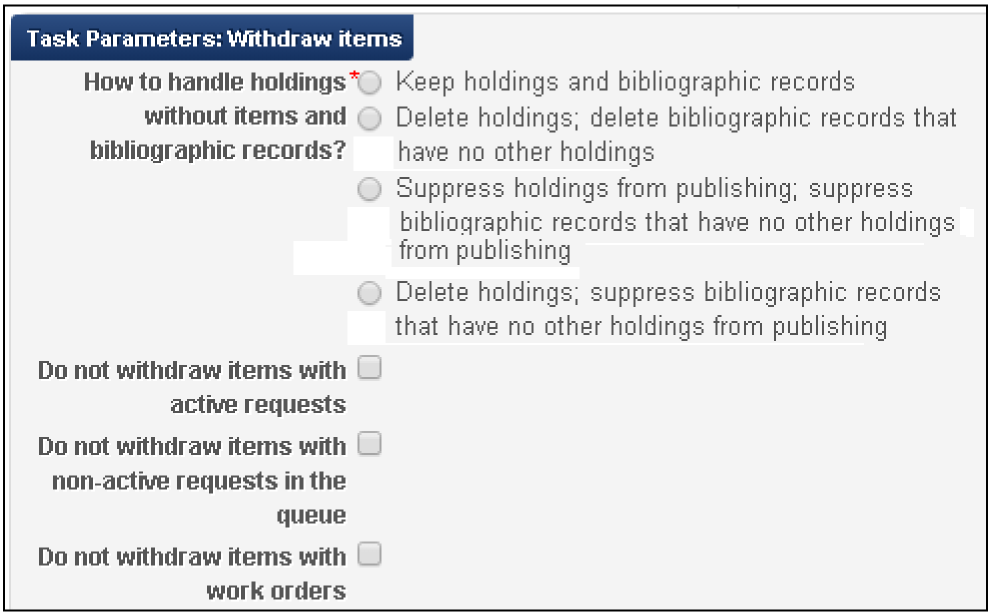


Figure 380: Run a Job - Enter Task Parameters Page

d Select one of the following withdraw parameters to apply to holdings:

- **How to handle holdings without items and bibliographic records**

  – **Keep holdings and bibliographic records** – Keep both holdings and bibliographic records

  – **Delete holdings; delete bibliographic records that have no other holdings** – Delete the holdings records without items, and the associated bibliographic records that have no other holdings

  – **Suppress holdings from publishing; suppress bibliographic records that have no other holdings from publishing** – Suppress holdings records without items and the associated bibliographic records (that have no other holdings) from publishing

  – **Delete holdings; suppress bibliographic records that have no other holdings from publishing** – Delete holdings records without items and suppress the associated bibliographic records (that have no other holdings) from publishing

- **Do not withdraw items with active requests**
- **Do not withdraw items with nonactive requests in the queue**
- **Do not withdraw items with work orders**

e Click **Next** to open the Run a Job - Job Details and Schedule page.

f Enter a name (required) for the job.

NOTE:
The value you enter identifies this job for editing and monitoring (see **Monitoring Jobs** in the *Alma Administration Guide*).

g. Select a schedule for the job if more than one option is listed. Options may include a specific date and time, an interval, or **As Soon As Possible**.
h. Click **Next** to open the Run a Job - Review and Confirm page.
i. Review the displayed information and click **Save** to run the job according to the selected schedule. You can monitor the progress of the job on the Monitor Jobs page (see **Monitoring Jobs** in the *Alma Administration Guide*).

Performing Global Changes on Holdings Records

PERMISSIONS:

To remove items from the physical inventory, you must have one of the following roles:

- Repository Manager
- Catalog Manager

Alma allows staff to update holdings information for physical items that have been added to a set.

After the job is run, the job report identifies how many records were updated and whether any records failed.

To perform global changes on holdings records:

1. On the Run a Job – Select Job to Run page (A**dministration > Manage Jobs > Run a Job**), select the **Information Update** filter from the drop-down list.
2. Select the **Change holding information** job.

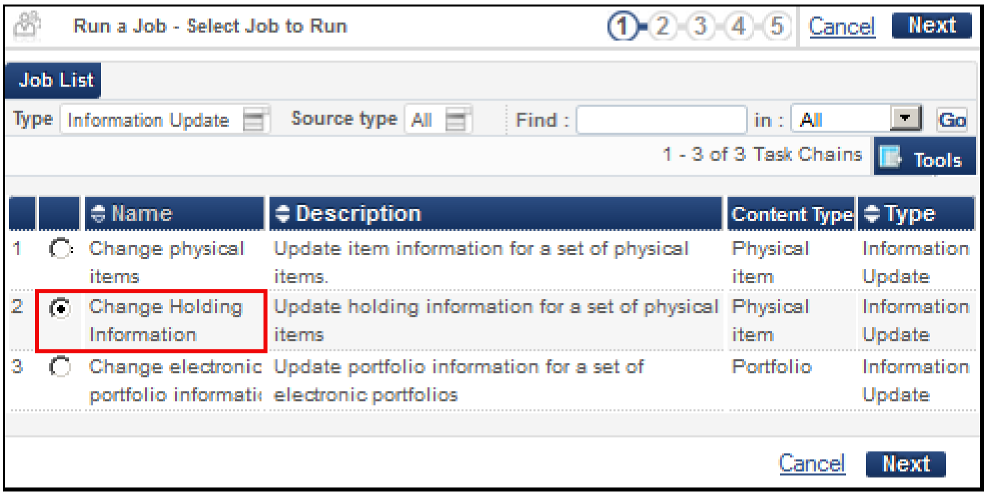


Figure 381: Select Job to Run

3 Click **Next** and select the set to process. For information on sets, refer to **Adding and Modifying Sets** on page 84.

4 Click **Next** to enter task parameters.

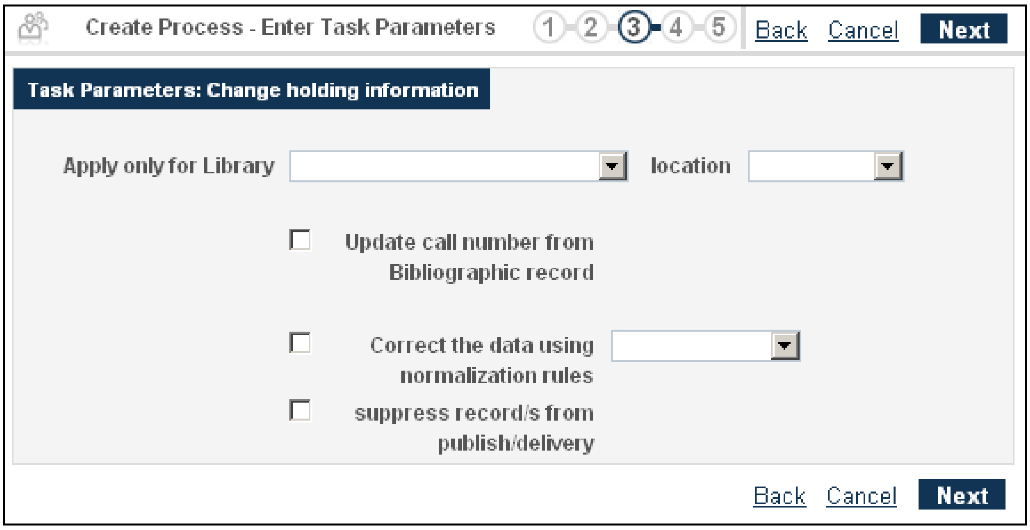


Figure 382: Enter Task Parameters

5 Specify the task parameters. See the table below for a description of each parameter.

Table 60. Change Holdings Information Task Parameters

Parameter	Notes
Apply only for Library/ location	Allows you to apply changes to items located at a specific library/location only. You must specify a location if a library has been selected in the drop-down list.
Update call number from Bibliographic record	Select the check box to globally update the call number using the value stored in the bibliographic record.
Correct the data using normalization rules	Select the check box and the normalization rules from the drop-down list.
Suppress record/s from publish/delivery	Select this check box to prevent records from being published to external discovery systems, including Primo.

6 Click **Next**, specify the job name, and select the schedule for the job.

7 Click **Next**, review the job, and click **Save** if everything is specified correctly.

8 Click **Save**.

Performing Global Changes on Item-Level Information

PERMISSIONS:

To update physical inventory, you must have the following role:

- Repository Manager

Alma allows staff to update item-level information for physical items that have been added to a set.

After the job is run, the job report identifies how many records were updated and whether any records failed.

NOTE:

For instances where running the **Change Physical Item** job requires a location change, a new holdings record is created with the new location information. If the previous holdings record with the old location information (that was changed by running the**Change Physical Item** job) was linked to a PO line, the PO line link is broken. It no longer exists. For the new holdings record created with the new location information, you will need to manually associate the PO line using the **Actions > Associate a PO Line** option on the **List of Holdings** page (refer to the illustration below).

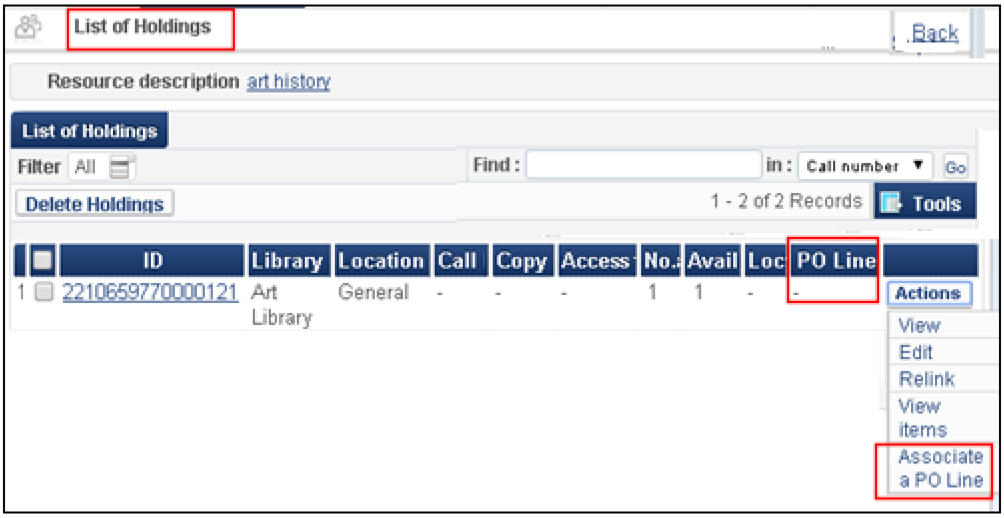


Figure 383: Manually Associate a PO Line

To perform global changes on item-level information:

1. On the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select the **Information Update** filter from the drop-down list.
2. Select the **Change Physical Item** job.

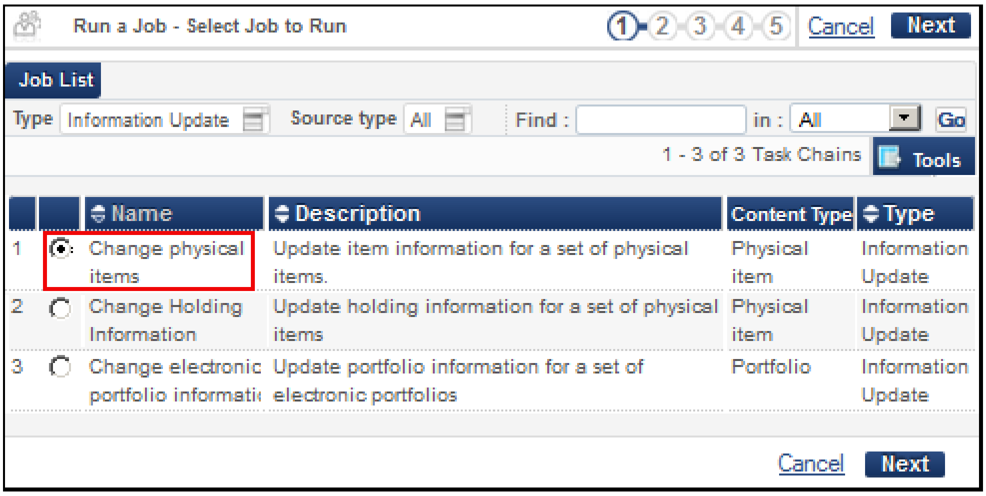


Figure 384: Select job to Run

3. Click **Next** and select the set to process. For information on sets, refer to **Adding and Modifying Sets** on page **84**.
4. Click **Next** to enter task parameters.

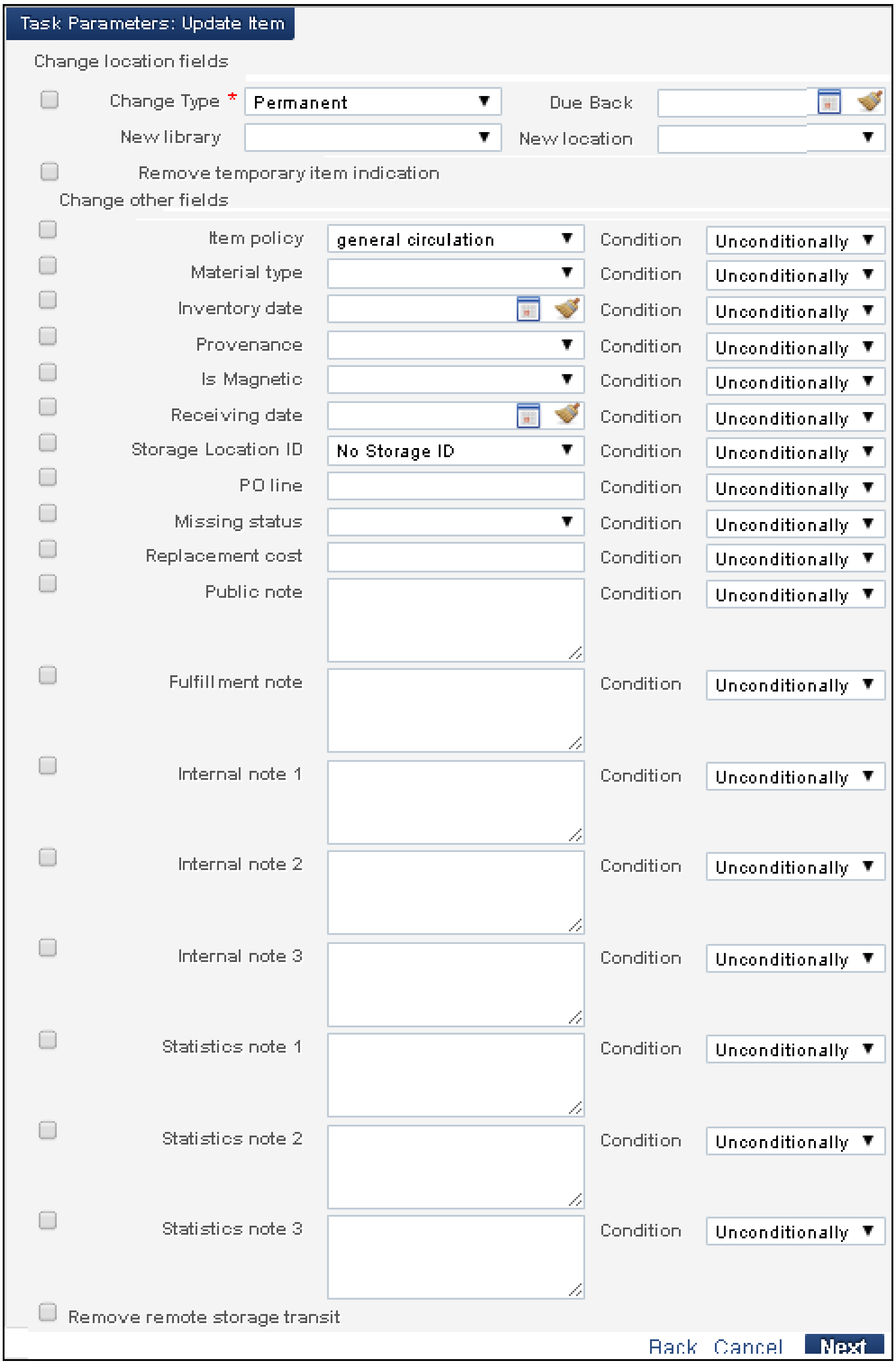


Figure 385: Enter Task Parameters

5 Specify the task parameters. These parameters correspond to the options available on the Physical Item Editor tabs (see below) that can be accessed by doing a repository search for physical items and clicking **Edit** for one of the items in the search results list. Refer to **Using the Repository Search Results List** on page 35 and **Updating Item-Level Information** on page 465.

For each parameter row, you must select the check box at the beginning of the row for which you want to make a change.

NOTE:
The **Change type** field (changing the temporary or permanent location) affects only the Change Location Fields section and not the Change Other Fields section.

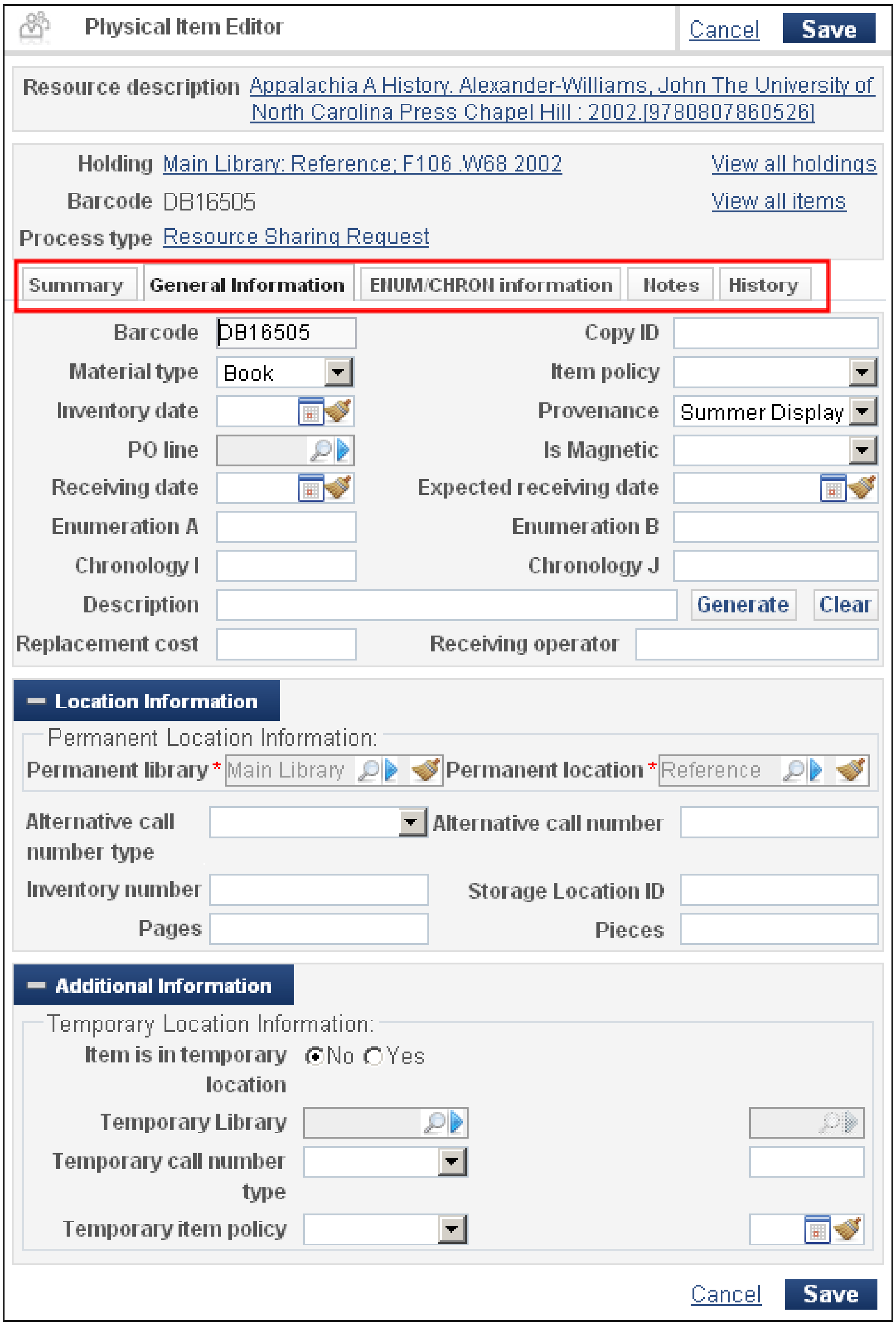


Figure 386: Physical Item Editor Parameters

For each parameter, select one of the following conditions from the associated drop-down list:

- **Unconditionally** – The system will always perform the change to the field.
- **If field empty** – The system will perform the change only when the field has no value.
- **If field not empty** – The system will perform the change only when the field has a value.

NOTE:
Items are updated as missing only if the status is empty (Condition = If field empty) or if the item is defined as Technical (migration).

6 Click **Next**, specify the job name, and select the schedule for the job.

7 Click **Next**, review the job, and click **Save** if everything is specified correctly.

8 Click **Save**.

Managing Physical Holdings Records (Moves/Deletes)

PERMISSIONS:

To update physical inventory, you must have the following role:

- Repository Manager
- Physical Inventory Operator
- Purchasing Manager
- Purchasing Operator

Alma provides tools that enable you to manage your physical holdings records. This is accomplished with options to:

- Delete holdings records that do not have any items
- Move items from one holdings record to another holdings record

To move items and delete holdings:

1 Complete a physical title or all titles search for something in the database with multiple holdings.

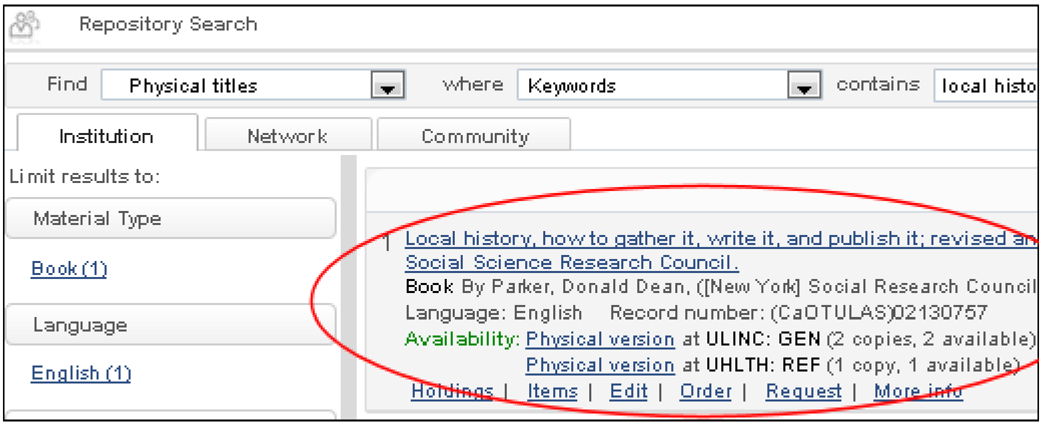


Figure 387: Multiple Holdings

2 From the results list, click **Items**. The List of Items page opens.

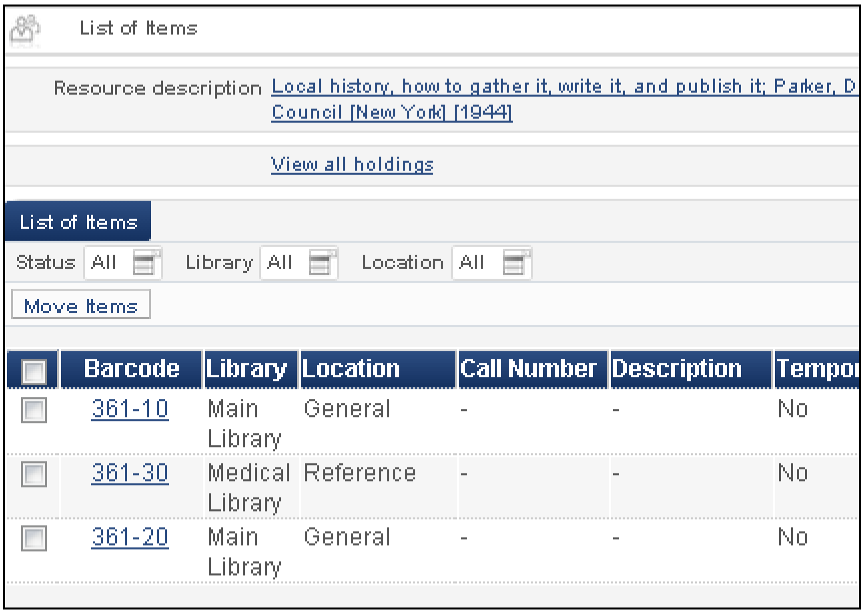


Figure 388: List of Items Page

3 Select the item(s) to move and click **Move Items**.

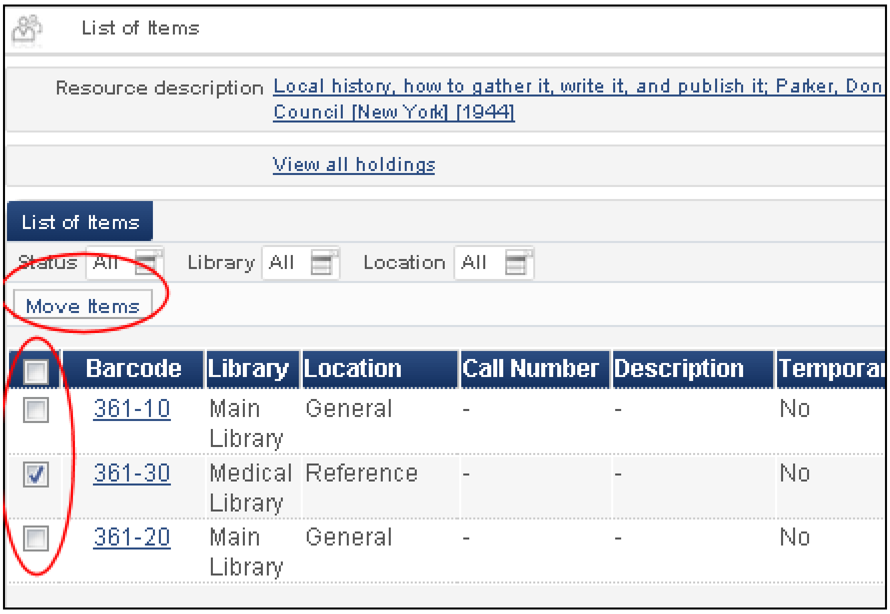


Figure 389: Select Item(s) and Click Move Items

The List of Holdings page opens.

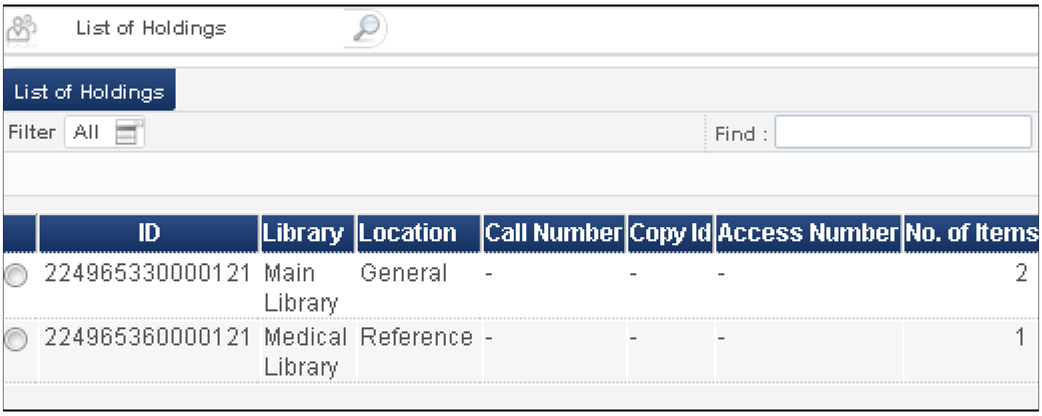


Figure 390: List of Holdings Page

4 Select the holdings location to which you want to move the items and click **Select**.

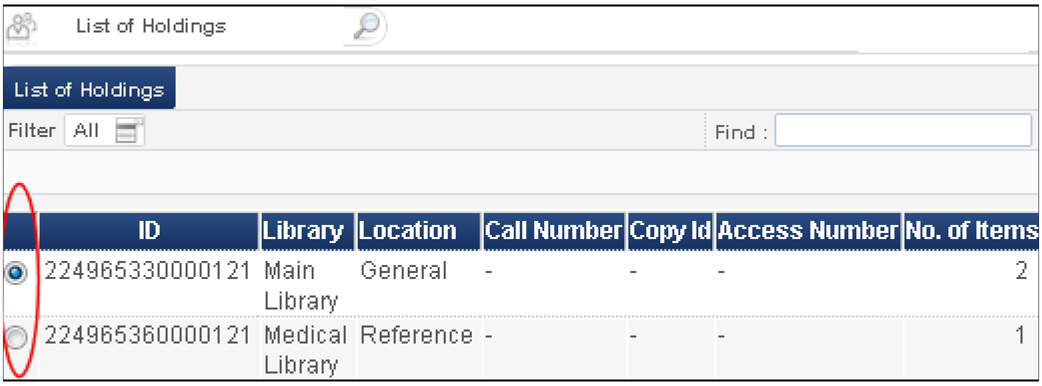


Figure 391: Select a Holdings Location to Identify the Move to Location for the Items

The List of Items page displays an informational message to confirm what has been processed.

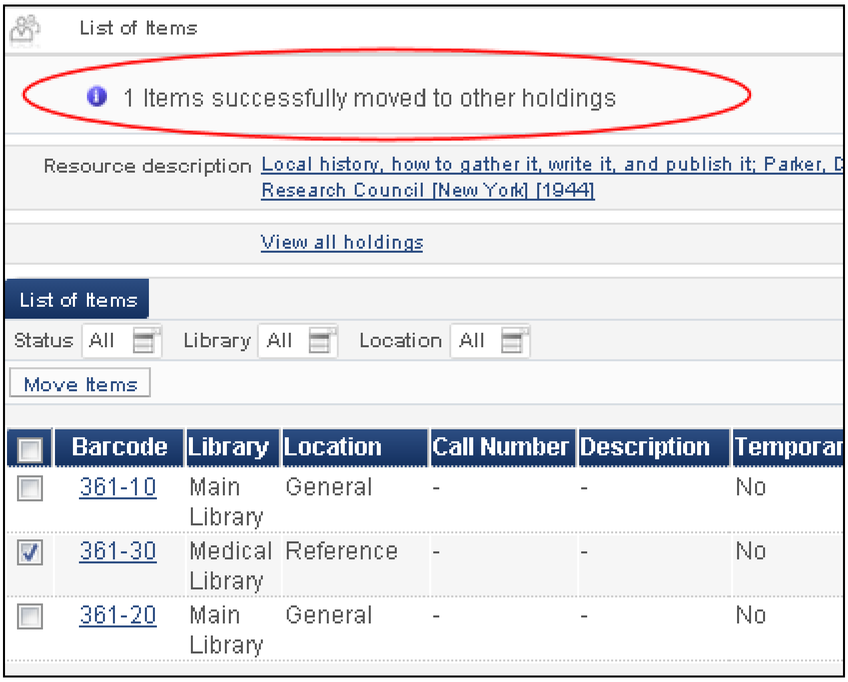


Figure 392: Move Confirmation Message

5 Click the **View all holdings** link.

The updated List of Holdings page opens.

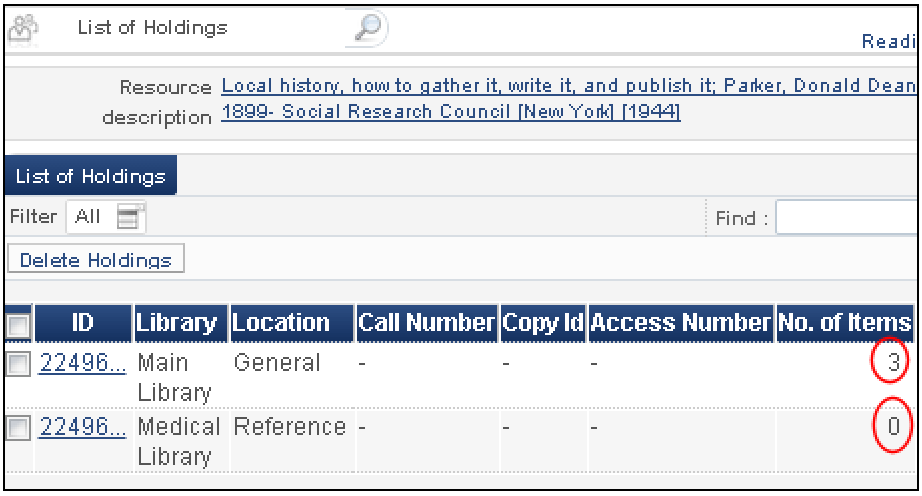


Figure 393: View All Holdings Display

6 To delete the Medical Library/Reference holdings with zero items, select that holdings (row) and click **Delete Holdings**.

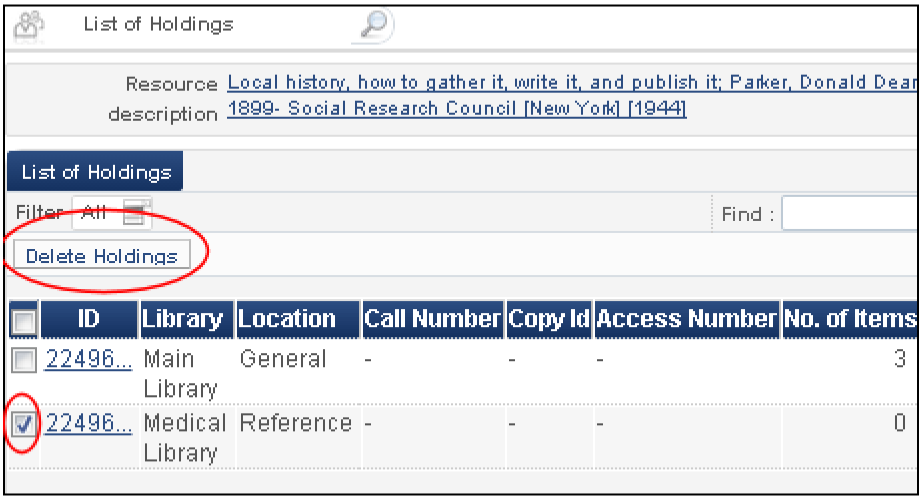


Figure 394: Select and Delete Holdings

7 When the delete confirmation alert box opens, click **Confirm**.

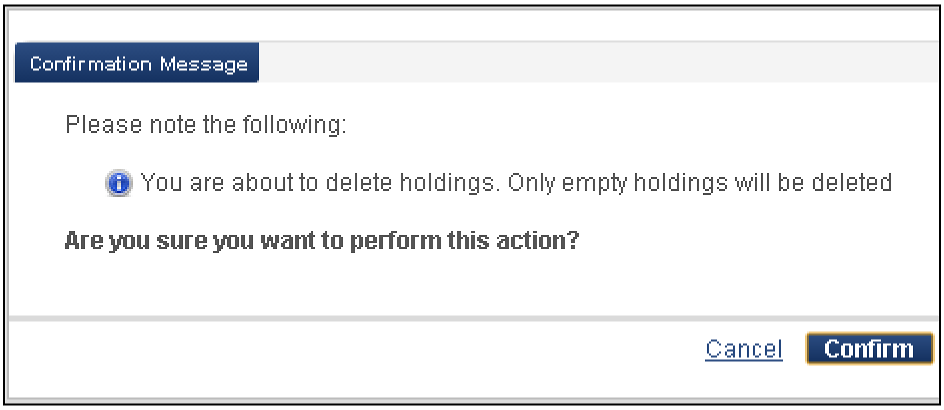


Figure 395: Delete Holdings Confirmation Message

The List of Holdings page refreshes with an informational message regarding the change and the holdings record (Medical Library/Reference in this example) removed from the list.

Figure 396: Informational Message and Updated List of Holdings

Managing Collections

A collection is an entity that can aggregate all three resource types (physical, digital, and electronic) into one entity with its own bibliographic record. It can be based entirely on topic or subject matter, such as, for example, a collection titled "The Beatles" (based on the popular rock music band/cultural phenomenom), which would hold records of physical items including biographies and sheet music, digital audio and video of live performances and studio recording sessions, and any number and type of song and record album holdings.

Structurally, collections can have child- or sub-collections and parent collections that behave in hierarchical relationship to each other. A collection like "The Beatles" could have sub-collections based on chronology, geography, biography of individual band members, or any other category that your institution finds useful. "The Beatles" collection itself could be a sub-collection of a larger 60s pop music or Rock 'n Roll genre collection.

Collections can be used in searches (as facets and as in searching by collections) and in other areas of the system such as publishing: resources of all types can be published with their collection details, including parent and child collections.

This section includes the following topics:

Adding a Top Level Collection

PERMISSIONS:

To add a top-level collection to your inventory, you must have one of the following roles:

- Collection Inventory Operator
- Collection Inventory Operator Extended

Collections are managed resources that include any number of inventory items grouped together. They provide levels of organization and management to digital collections and other resources.

To add a top-level collection to your inventory:

1. From the **Alma** main menu, go to **Resource Management > Create Inventory > Add Top Level Collection**.

   The Add New Collection page opens (**Figure 397**).

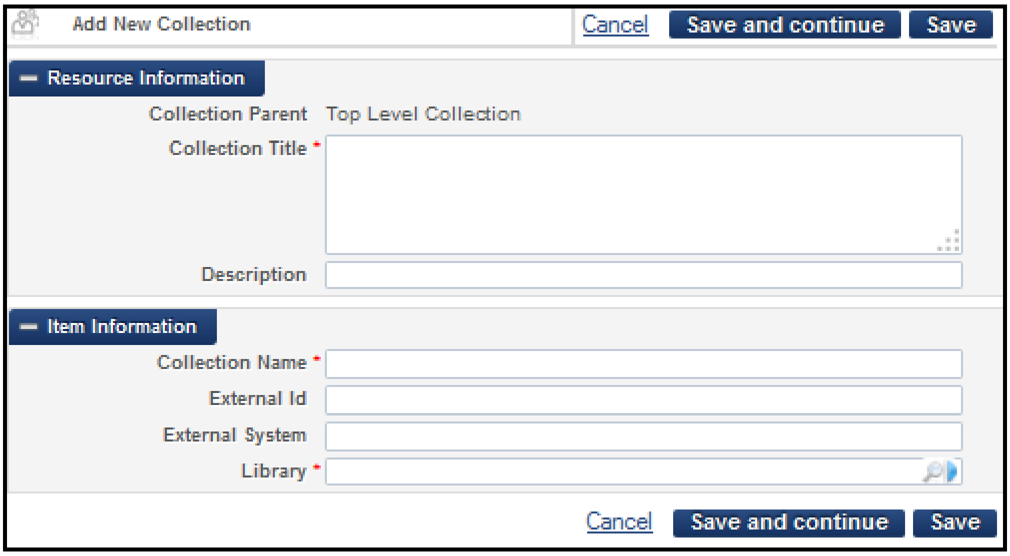


Figure 397: Add New Collection Form

2 Use the following table to enter required and optional fields on the form.

Table 61. Add New Collection Fields

Field	Description
Collection Title	Corresponds to 245 $a - Title. *Required.*
Description	Corresponds to 520 $a - Description
Collection Name	Internal name for the collection (rather than the bibliographic record name). *Required.*
External ID	When the collection is created automatically by the import job (OAI set), this is the ID of the collection assigned by the remote system. Additionally, users can store IDs in this field to be used later in the published metadata, and Primo can use it during discovery.
External System	When the collection is created automatically by the import job (OAI set), this is the name of the external system
Library	The library where the collection is stored (select from drop-down options). *Required.*

3 Click **Save** to save your work and move on to another task, or **Save and continue** to save the collection and open the Collection Resource Editor page, where you can enter further information for the new collection.

Adding a New Collection Using the Community Zone (CZ)

PERMISSIONS:

To add a new collection to your inventory using the CZ, you must have the following role:

- Repository Administrator

Alma provides the capability to create new collections using data stored in the Community Zone (CZ).

VIDEO:

For information about the imporing electronic portfolios into a global electronic collection (a collection in the Community Zone), see the *Import an Electronic Portfolio into a Global Collection* video (6:15 mins).

To add a new collection to your inventory using the CZ:

1 Complete a Repository Search in the CZ for the new electronic collection that you want to add. The CZ collection search results list opens.

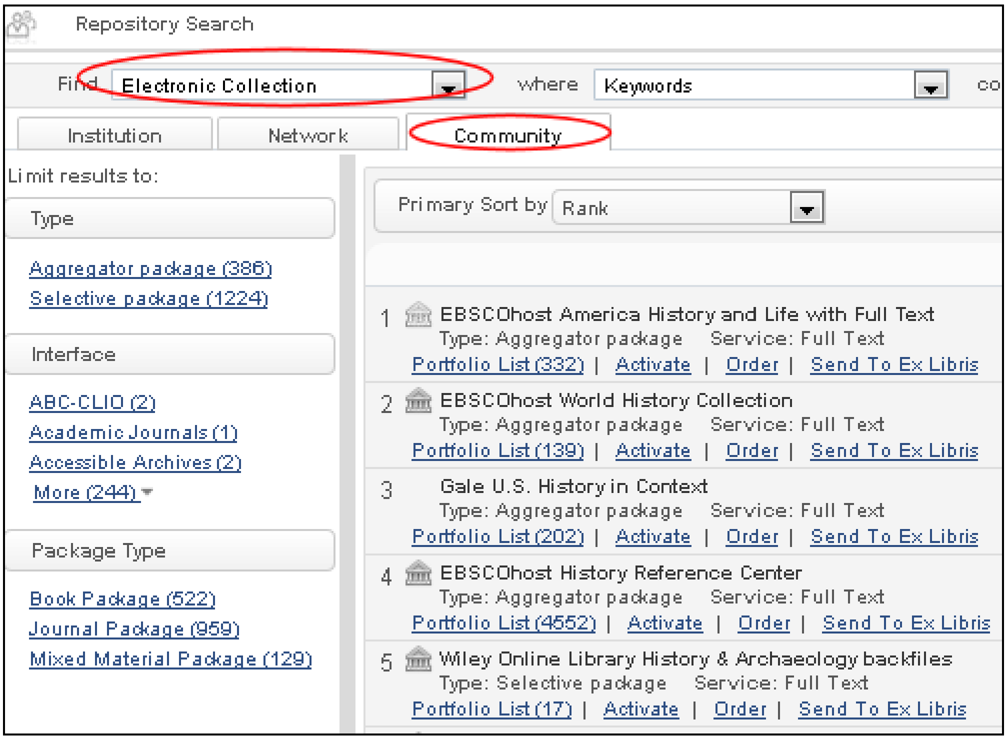


Figure 398: Community Zone Search Results List

2 For the collection that you want to add, click **Activate**. Step 1 of the Activation Wizard opens.

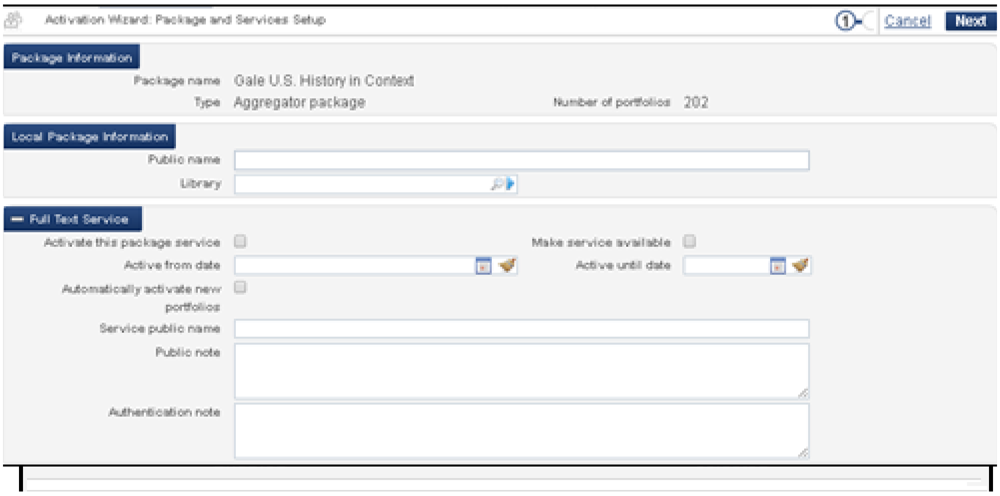


Figure 399: Collection Activation Wizard Step 1

3 Complete Step 1 of the Activation Wizard using **Table 62** for a description of the available options and click **Next**.

Table 62. Collection Activation Wizard Step 1

Field	Description
Public name	Enter the local name that you want to display for this collection.
Library	Specify the library for this collection.
Activate this collection service	Select this check box to activate this collection.
Make service available	Select this check box to make the service available.
Active from date	Specify the beginning of the active date range for this collection.
Active until date	Specify the ending date of the date range covered by this collection.

Table 62. Collection Activation Wizard Step 1

Field	Description
Automatically activate new portfolios	Select this option to indicate that new portfolios added to the collection should be automatically activated. The option to automatically activate new portfolios associated with a service is available for electronic collections of both the selective type and the aggregator type. (This option can be configured from both the Activation Wizard for new services and in the Electronic Services Editor for existing services.)
Service public name	Use this option to specify a service name that you want to display.
Public note	Use this free-text field to enter a note that displays to patrons.
Authentication note	Use this free-text field to share additional information related to authentication.

4 Enter the linking information in Step 2 of the Activation Wizard and click **Next**.

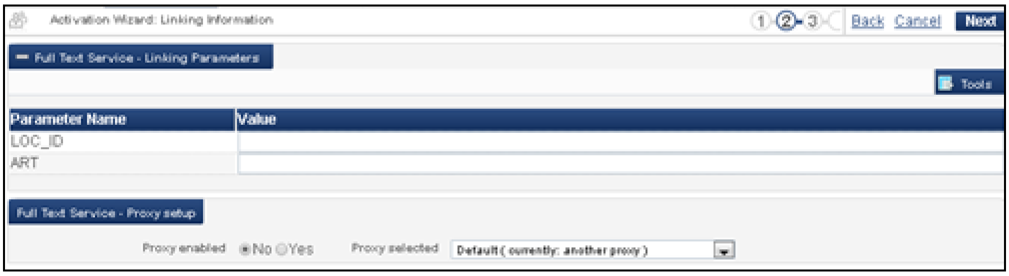


Figure 400: Collection Activation Wizard Step 2

5 Specify one of the following activation methods (Step 3) and click **Next**:

- Activate all - Activation of the complete collection with no selection of portfolios
- Activate collection and selected portfolios
- Manual activation - activate collection and manually select portfolios

6 Review your collection activation selections on the Activation Summary page (Step 4 of the Activation Wizard).

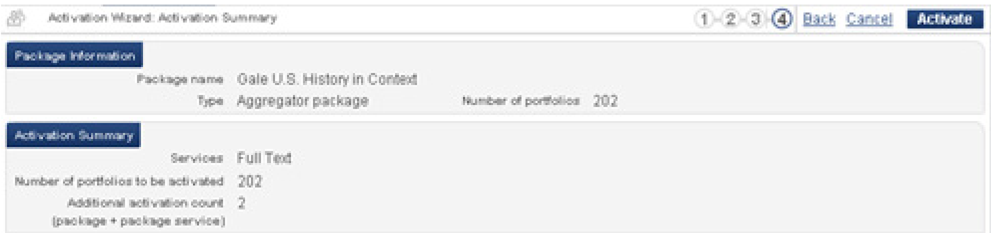


Figure 401: Collection Activation Wizard Step 4

7 When you have confirmed that your activation selections are complete and accurate, click **Activate**.

Viewing the Collection Page

The top-level collection page provides a single page where Collection Inventory Managers can access and manage all top-level collections in the system.

To access this page:

Under **Resource Management > Search and Sets**, click the **Top Level Collections** link.

The Repository Search page opens to a list of all the collections in the system.

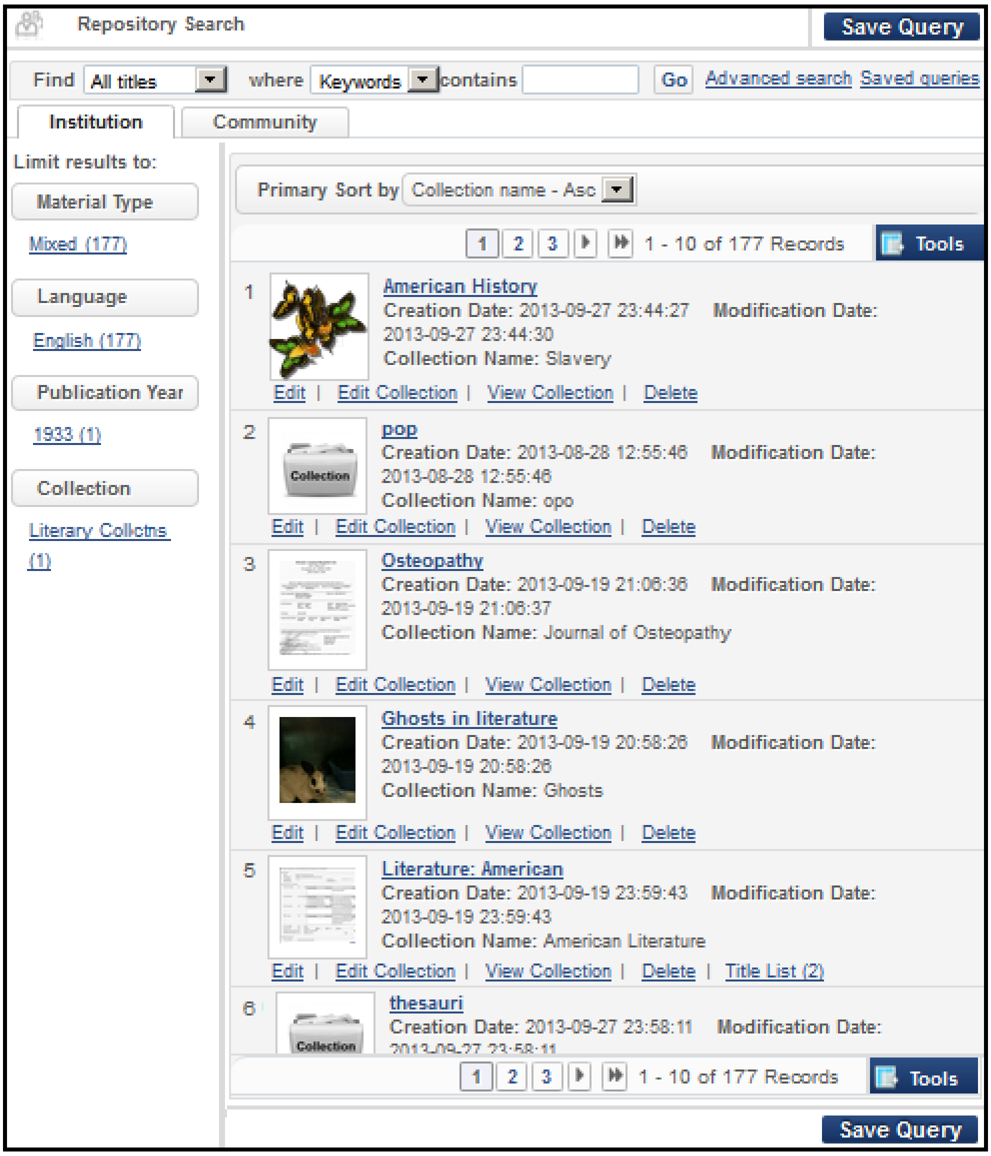


Figure 402: Top-Level Collection Page

For details about the links on this page, refer to **Creating, Editing, and Deleting Collections** on page **496**.

Creating, Editing, and Deleting Collections

Because collections allow you to group records of different types (physical, digital, and electronic) and from different sources (internal, external, remote) , digital asset management systems often use them to aggregate the many types of resources into organized hierarchical units. As part of this job, institutions may

- Construct sub-collections
- Assign thumbnails to collections
- Add items, sets, and remote digital objects to collections and sub-collections
- Integrate collection assignment with import profiles

NOTE:
Alma collections reference local and remote objects, but all remote objects remain in their remote locations while the Alma collection stores object metadata only.

This functionality builds on the top-level root collection management.

PERMISSIONS:

The following roles can create, edit, and manage collections and sub-collections:

- Collection Inventory Operator
- Collection Inventory Operator Extended

To work with collections, first access an existing collection by clicking the **Top Level Collections** link under **Resource Management > Search and Sets**, performing a search, and using the filter to display only **Collections**.

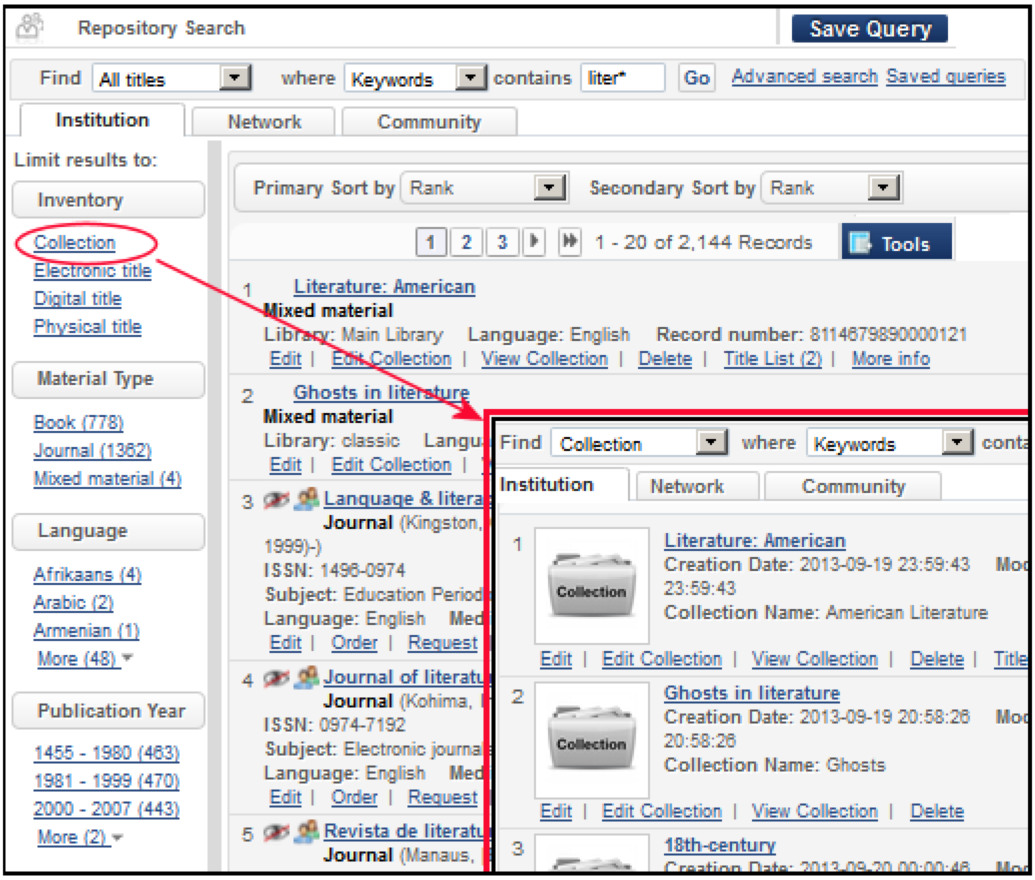


Figure 403: Filtering for Collections

From the list of available collections, under each brief listing, four links are consistently available:

- **Edit:** opens the collection for viewing in the metadata editor
- **Edit Collection:** opens the collection for viewing in the Collection Resource Editor (see below)
- **View Collection:** opens the collection in the Collection Resource Editor without the ability to edit, apply, or save changes
- **Delete:** allows you to delete the collection if it does not contain any sub-collections or items.

Additional links may also appear on the same line:

- Title List (#titles): Lists all the sub-collections of this collection
- More info: Displays related information such as related records and publishing information in a pop-up box on the page

  You can click the **Requests/Work orders** link on the **More Info** pop-up window to open the Resource Request Monitoring page and view work order information for the item (refer to **Monitoring Requests and Work Orders** in the *Alma Fulfillment Guide*).

To create a new collection or sub-collection:

1 From the list of available collections, access the parent collection for your new collection and click **Edit Collection**. The Collection Resource Editor page opens to the Summary tab, which displays title and library information for your parent collection as well as thumbnail information and identifiers.

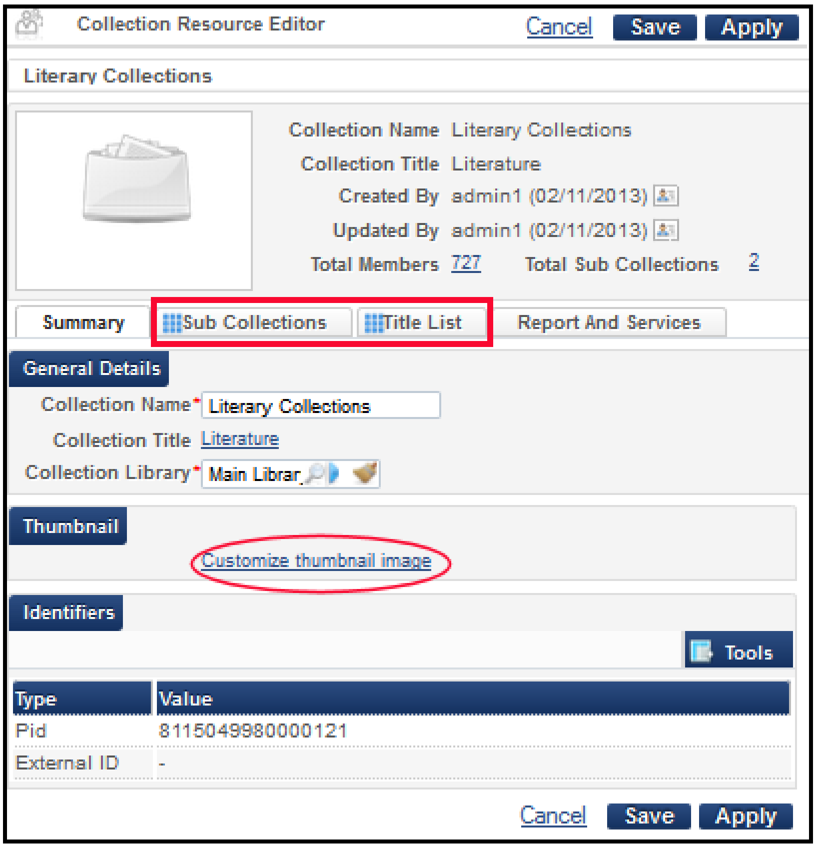


Figure 404: Collection Resource Editor, Summary Tab

(To add a thumbnail for the parent collection, click the **Customize thumbnail image** link and follow the browse and selection prompts.)

The blue squares to the left of the tab labels indicate that information has been added to that tab.

2 Click the **Sub-collections** tab to begin entering information for a new collection under this parent.

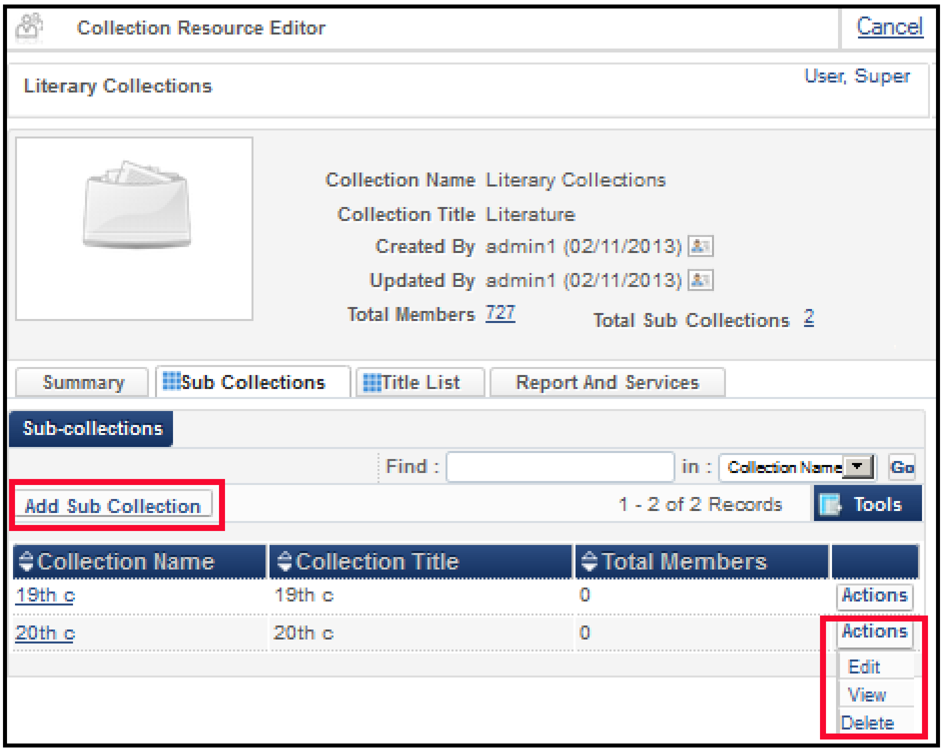


Figure 405: Sub-collections Tab in the Collection Resource Editor

Any previous collections added to the parent collection are listed in the table in the Sub-collections section below the Add Sub-collections button. The **Actions** drop-down button for each row allows editing, viewing, and deleting.

3 Click the **Add Sub-collection** button. The Add New Collection page opens.

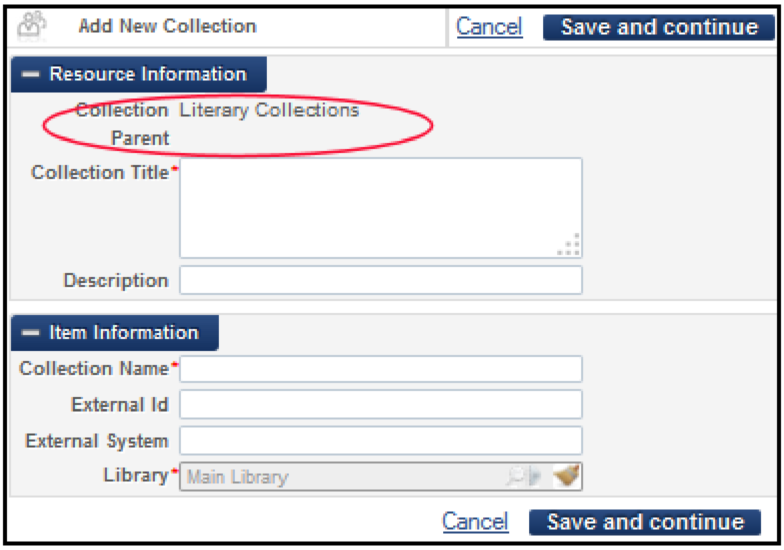


Figure 406: Add Child Collection

NOTE:
The Collection Parent at the top of the Resource Information section is the parent collection from the previous Collection Resource Editor page.

On the Add New Collection form, information entered in the Resource Information section goes to the bibliographic record. Item information applies to the item itself (object, source). This is used in the XML. (External ID and External System can be manually added or automatically added during an import of external material.)

3 Enter the required fields for adding a collection. See **Adding a Top Level Collection** on page **490** for a discussion of top-level collections that includes a table that defines each field.

4 Click **Save and continue.**

The Collection Resource Editor opens with your new collection added to the Sub-collections section.

5 To add titles to the collection, click the **Title List** tab.

A Title List section opens. Any existing titles are listed in the table below the Add titles buttons.

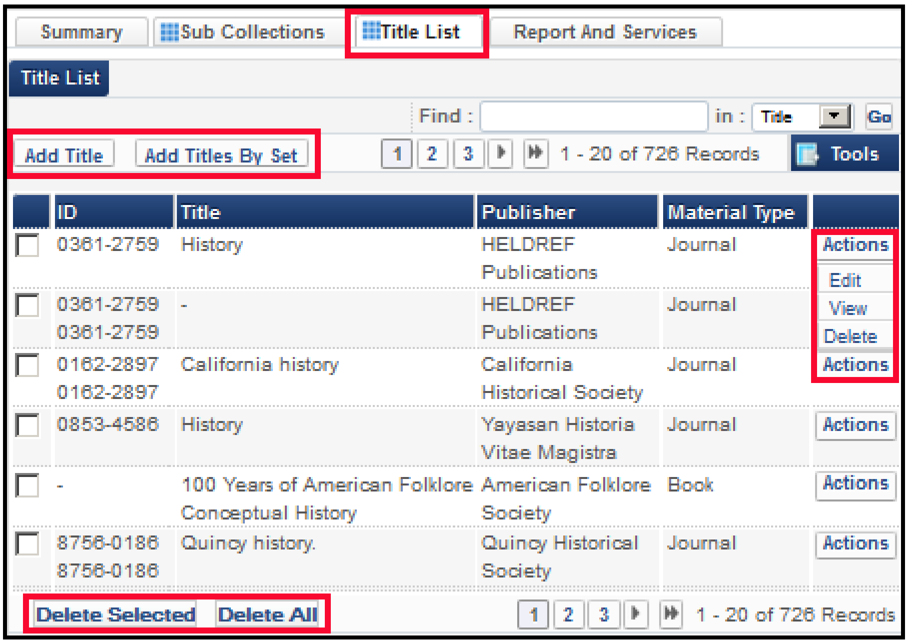


Figure 407: Collection Title List Tab

6 To manually add single titles to the collection, click the Add Title button and select from the list that opens. To add titles by the set, click the **Add Titles By Set** button and make your selection from the sets listed.

You can also:

- Select check boxes for items to delete, then click **Delete Selected**
- Delete all items using the **Delete All** button
- Edit, view, or delete single items using the **Actions** drop-down menu for the particular item.

7 When you have completed your new collection or made the updates you want, return to the **Summary** tab and click:

- **Save** to save your work and return to the list of collections or
- **Apply** to save your work and remain on the Collection Resource Editor page for the parent collection.

Working with the Community Zone Updates Task List

PERMISSIONS:

To work with the Community Zone Updates Task List, you must have the following role:

- Repository Manager

The Community Zone Updates Task List page in Alma displays changes that were made to your Institutional Zone (IZ) during updates from the Community Zone (CZ). These changes are specific to your institution and may include modifications to bibliographic records as well as changes to holdings, availability, security requirements, and parser parameters.

For more details, refer to:

- **Community Zone Updates Task List Page - Tabs** on page **503**
- **Activation of CZ Collections** on page **504**
- **Using the Community Zone Updates Task List Page** on page **506**
- **Exporting the Community Zone Updates Task List** on page **509**
- **Incorporating the Community Zone Updates Task List into Your Workflow** on page **509**

Updates are synchronized on Sundays at midnight in your time zone.

NOTE:

Additional updates such as enrichments and authorities may occur during the week in order to prevent overload to your system.

VIDEO:

For more information about the Community Zone Updates Task List, see the *Alma Community Zone Intro and Task List* video (14:10 mins).

Community Zone Updates Task List Page - Tabs

The Community Zone Updates Task List shows all changes relevant to your institution on the All tab of the page.

The Community Zone Updates Task List page contains two tabs:

- The Review tab is open by default. It includes changes made to your records that you may want to review and take action on. For example, a parameter change may not fit your institution's requirements. You can manually revert to the old value by using the Edit action.

- The All tab shows information for all changes that were made to your records or that are relevant to your institution.

Activation of CZ Collections

The way you activate a collection from the CZ determines the actions that you can take following a CZ update.

The activation can be processed in one of two ways:

1. Auto-active collection: activating an electronic collection of the aggregator package type and selecting the check box to indicate that the source should be updated automatically.
2. Non auto-active collection: activating an electronic collection of the selective package type (or of the aggregator package type) and setting it to not use automatic updates.

Available actions vary depending on the above options. See **Table 63** for details.

Table 63. Actions for CZ Updates

Type	Action Name	Action Taken	Tab
Both (Auto-activation and Non auto-activation)	Electronic Collection linking parameters update	The action is performed. Users can undo it by clicking the Edit option and manually restoring the previous value.	Both (Review and All)
	Electronic Collection base url updated	The action is performed. Users can undo it by clicking the Edit option and manually restoring the previous value.	Both (Review and All)
	Electronic Collection service deleted	The electronic collection is unlinked from CZ and set to inactive. The institution icon (single building) shows beside the electronic collection in the repository search. Users can decide to keep the electronic collection, in which case they should use the Edit option and manually manage the electronic collection, or they can decide to delete it, in which case they will need to find the electronic collection in the repository search and manually delete it.	Both (Review and All)
	Portfolio coverage update	The action is performed.	All only
	Electronic Collection deleted	The electronic collection is unlinked from CZ and turned inactive. The institution icon (single building) shows beside the electronic collection in the repository search. Users can decide they want to keep the electronic collection, in which case they should use the Edit option and manually manage the electronic collection, or they can decide to delete it, in which case they will need to find the electronic collection in the repository search and manually delete it.	All only

Table 63. Actions for CZ Updates

Type	Action Name	Action Taken	Tab
Auto-activation	Portfolio added to auto active electronic collection	The action is performed.	All only
Non auto-activation	Portfolio added to non auto- active electronic collection	No action is performed. In the All tab, users can see added portfolios to the CZ electronic collection. In order for them to add the portfolios to their electronic collection, they will need to manually go into the CZ, find the portfolio, and activate it. Alternatively, they can add it as a local portfolio manually.	All only
Auto-activation	Portfolio deleted from auto active electronic collection	The action is performed.	All only
Non auto-activation	Portfolio deleted from non auto-active electronic collection	The portfolio is not deleted but it is unlinked from the CZ and saved as a local portfolio. Users will see this action in the Review tab and will be able to manually delete the portfolio by using the Edit option. They can keep the local portfolio by clicking the Dismiss action.	Both (Review and All)

Currently, the update job handles updates to CZ resources only. If an institution adds an IZ portfolio to a CZ electronic collection, the job does not update it. The IZ portfolio is created as a duplicate, and no automatic job deletes it.

You can see new CZ portfolios added to electronic collections in the **All** tab, and you need to manually delete the existing IZ portfolios following the update.

Using the Community Zone Updates Task List Page

NOTE:

The **Review** tab includes only the changes for which you can take action. The view (All) feature of this page functions as a log and can be used by all institutions for all updates. To do this, click the **All** tab from the

Community Zone Updates Task List page and use the search and filter features to help you find the changes you want to view.

See **Exporting the Community Zone Updates Task List** on page **509** if you want to export the list of tasks to an Excel file.

To work with the Community Zone Updates Task List:

1. From the Alma main menu, go to **Resource Management > Manage Inventory**, and click **Community Zone Updates Task List**.

   The Community Zone Updates Task List page opens to the Review tab by default, displaying the following columns of information:

   - Report Type
   - Electronic Collection Name – When available, this column provides a link for the resource to the appropriate Alma editor.
   - Title – When available, this column provides a link for the resource to the Electronic Portfolio Editor.
   - Submit Date
   - Before Change/After Change – The information in the Before Change and After Change columns represents the changes made globally as part of the Community Zone update job.
   - Local Information – The information in the Local Information column identifies the local override information maintained by the library.

Figure 408: Local Information Details Example

Any changes that have affected the resources set to manual (non auto-active) in your configuration and on which a Repository Manager from your institution can take action (such as manually updating a URL or deleting a resource that has been unlinked by the CZ in the synchronization) appear on this tab.

2 Use the **Find** search field, the date range with the **Apply Filter** button, and/or the report type filter drop-down list to narrow the scope of your view.

The report type filter provides the following options:

- All
- Electronic collection deleted
- Electronic collection linking parameters update
- Electronic collection base URL updated
- Portfolio coverage update
- Portfolio deleted from non auto-active package
- Electronic collection service deleted

NOTE:
Items in the filter reflect the report types on both tabs.

The date filter allows you to search for items based on a date range of when the item was submitted. The range goes back as far as your implementation of Alma and is never purged from the system.

3. Process items on the Review tab as follows:
   a. Click **Actions > Dismiss** to remove a row from the list (and take no further action on it).
   b. Click **Actions > Edit** to make changes to a collection or portfolio.

      For an electronic collection report type, the Electronic Service Editor opens for making changes.

      For a portfolio report type, the Electronic Portfolio Editor opens for making changes. For more information, see **Modifying a Portfolio Using the Electronic Portfolio Editor** on page **349**.
   c. Use the check box options to selectively dismiss or dismiss all of the rows in the list and click **Execute**.

Exporting the Community Zone Updates Task List

The Tools menu on the Community Zone Updates Task List page allows you to run the following export options:

- Extended Export – Select **Tools > Extended Export** to export all tasks to an Excel file. If the list contains more than 5000 tasks, the job runs in the background. You can use the Monitor Job page (**Administration > Manage Jobs > Monitor Jobs**) to monitor the job's progress and view the Excel files. Note that each file may contain up to 50,000 rows before the task list is split into additional files. Lists with fewer tasks are also saved to an Excel file, but the job is run in the foreground.
- Excel (current view) – Select **Tools > Excel (current view)** to export all tasks to an Excel file. Note that this export does not support task lists that are greater than 5000 tasks. If there are more than 5000 tasks, this option is disabled.

Incorporating the Community Zone Updates Task List into Your Workflow

Refer to the procedure below for a suggested method of incorporating the Community Zone Updates Task List into your workflow.

To incorporate the Community Zone Updates Task List into your workflow:

1. Access the Community Zone Updates Task List once per week.
2. Review the updates made to your IZ records from the CZ updates.
   a. Apply the Community Zone Updates Task List filters that are useful for your particular institutional workflow. You may find it more useful to apply the filters and check the collection-level changes before applying the filters and checking the portfolio-level changes.
   b. As you filter and view the entries, look for:
      - Deleted portfolios

        These are portfolios that were deleted in the CZ and have become local portfolios. You will need to decide if the portfolio should be deleted. This decision will most likely be determined by whether there is still access to the resource.
      - Portfolios that were added to the aggregator collection but were not automatically activated

        The portfolio is not automatically activated if it was initially chosen on the collection level. You need to decide if the portfolio should be activated.
      - Portfolios where the global coverage was updated and the library has local coverage

        You will need to determine if you want to remove the local coverage.
3. Dismiss the records for which you have accepted the update using **Dismiss Selected** or **Dismiss All** (refer to the procedure **To work with the Community Zone Updates Task List:** on page **507** for more information). The expectation is that the vast majority, if not all, of the entries will be dismissed.

   Using the Community Zone Updates Task List eliminates the time-consuming process of manually reviewing and implementing each change.

NOTE:
Entries that have been dismissed are still available in the **All** tab. This ensures that you have a history of the entries which were dismissed.

6

Managing Profiles for Record Imports

This section includes:

About Import Profiles

Import profiles are components of the Resource Management infrastructure that are closely tied to other areas of the system. They can interact with various Acquisition functionalities, such as purchase orders and the Embedded Order Data (EOD) import workflow. They can also be used to import bibliographic or authority records without EOD.

Import profiles enable you to define how to import metadata and order information in the Alma repository. Profile definitions include source format, mapping definitions, and normalization routines to be executed during the import process.

EOD Imports

If you are importing using EOD, you can use one or more profiles that have been created for a particular vendor with specific configurations for the kinds of purchases that are being processed. A vendor can have multiple import profiles with specific configurations for a particular purchase type. For example, different import profiles might exist for purchases being funded through different funds, or for purchases for different libraries in the institution.

EOD files are provided by vendors. They contain the order information for material being purchased from the vendor. When an EOD file is processed, it is matched with a specific import profile for the type of purchase on the EOD file.

Configuring New Import Profiles

PERMISSIONS:

To configure or create import profiles, you must have the following role:

- Catalog Administrator

Authorized users can create import profiles that define how input file records are imported into Alma and how they are mapped to corresponding records in the Alma system.

NOTE:
For information on defining import profiles in order to create multiple items in multiple libraries and locations, see **Defining Import Profiles for Multiple Item Creation** on page **560**.

You can choose to create a new profile (see **Profile Types** below), or copy an existing import profile (see **Copying Import Profiles** on page **558**) and edit it for your new requirements (see **Editing and Viewing Import Profiles** on page **555**).

VIDEO:
See *Importing Bibliographic Records and Creating Inventory* for a detailed training Webex session on importing records (49 mins). Note that you must be logged on to the Ex Libris Learning Center to access this session.

Profile Types

Before beginning the new import profile wizard, determine which type of import profile you need.

The following profile types are available:

- **New Order** – Used for loading bibliographic records with embedded order data (EOD), resulting in the import of bibliographic information and the creation of PO lines and physical/electronic inventory according to the parameters configured in the import profile.
- **Update Inventory** – Used for updating inventory associated with PO lines, based on the PO line reference number or vendor reference number. For an in-depth explanation of this profile type, see **Understanding the Update Inventory Import Profile** below.

- **Repository** – Used for loading bibliographic records, resulting in the import of bibliographic information and the creation of physical/ electronic inventory according to the parameters configured in the import profile.
- **Authority** – Used for a complete reload of authority records. If matching authority records exist, they will be deleted and replaced by the new ones. (Available only if the authority usage policy is set to **local** by Ex Libris and if you have local authority records in your repository)
- **Initial Authority** – Used for the ongoing updates of authority records. Existing authority records that are matched with imported ones (according to the parameters configured in the import profile) will be updated and new imported authority records will be added. (Available only if the authority usage policy is set to **local** by Ex Libris)
- **Remote Digital** – Used for harvesting metadata from digital repositories external to Alma (such as Primo, Rosetta, or Dspace), then creating records in Alma. Searching in Alma will return the record information, but to view the objects you must go to the external repository or resource. For information about setting up a remote repository, see **Remote Digital Repositories** on page **680**.

NOTE:
The Digital Inventory Operator role is required in order to view/select the Remote Digital profile type.

VIDEO:
See *Importing Bibliographic Records and Creating Inventory* for a detailed training Webex session on importing records (49 mins). Note that you must be logged on to the Ex Libris Learning Center to access this session.

Understanding the Update Inventory Import Profile

Using the Update Inventory import profile, you can update inventory as part of a bulk import. This profile allows you to handle shelf-ready workflows, where the vendor provides resources that are already barcoded.

When Alma imports bibliographic records according to an Update Inventory profile, for each record, it attempts to match on either a PO line reference number received from the vendor or a vendor reference number.

On finding one of these, Alma runs the standard import/overlay logic, but unlike other import methods, it updates the inventory linked to the bibliographic record. (In all other cases, Alma simply creates new inventory; Update Inventory is currently the only way to update existing inventory.)

A part of the import/overlay logic also addresses the need for consistency between call numbers in Alma and the actual call numbers/spine labels of existing physical items to insure that items can be found on the shelf. As a result, when a new PO line is created and a PO line and holdings record already exist, the existing holdings record does not get changed. Instead, a new holdings record is created with the call number of the bibliographic record.

VIDEO:

Learn how to use the PO line number to match a record file to inventory in the *PO Line Information in Vendor Import File* video (9:10 mins).

NOTE:

Priority is given to the PO line reference number over the vendor reference number.

You can configure the actual record field used for matching by specifying the **Additional PO Line Reference** and/or **Vendor reference number field** in the PO Line Information tab. For the vendor reference number to work as a match field, you must also enter a vendor reference number type on the line below the reference number field and subfield.

For example:

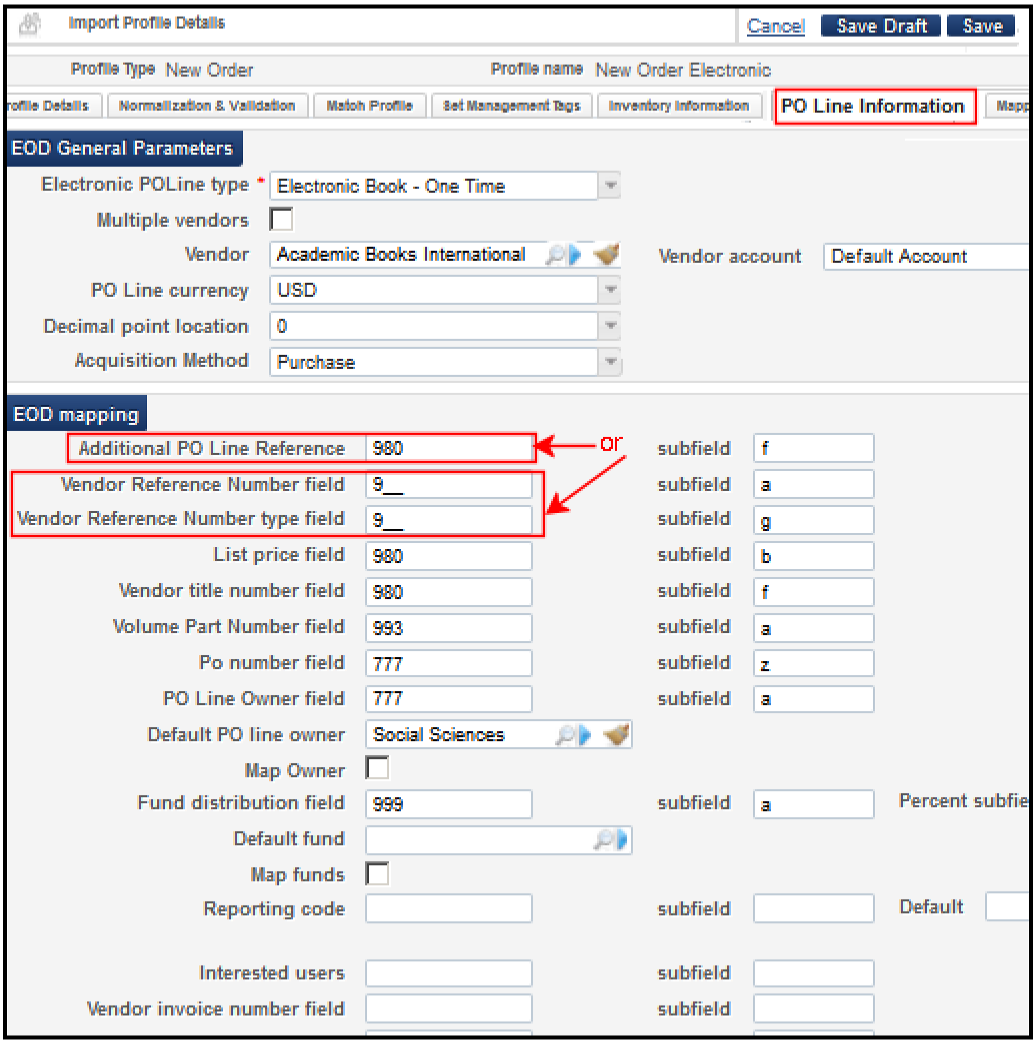


Figure 409: Mapping the PO Line Number and Vendor Reference Number and Type Fields

Note that in order to avoid the duplication of barcodes in the repository, the conditions under which an item is updated operate as follows:

Alma attempts to match items based on the incoming barcode, for both the **Basic** and **Advanced** mapping profiles.

- If the barcode exists in the repository and the item was updated before, the item will be skipped (for both the Basic and Advanced mapping profiles).
- If the barcode exists in the repository and the item was not updated before, the item will be updated (for both the Basic and Advanced mapping profiles).
- If the barcode does not exist in the repository and the Basic mapping profile is used, it will update an item that was not updated before, regardless of the

barcode match. If all of the items were already updated, the incoming record will be ignored.

If the barcode does not exist in the repository and the Advanced mapping profile is used, the barcode will be set for items that do not have barcodes.

Selecting a Profile Type

After you have decided on the appropriate **profile type** for your material, you can start the import profile wizard and select the type.

To select the import profile type:

1 On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), click the **Add New Profile** button (**Figure 410**).

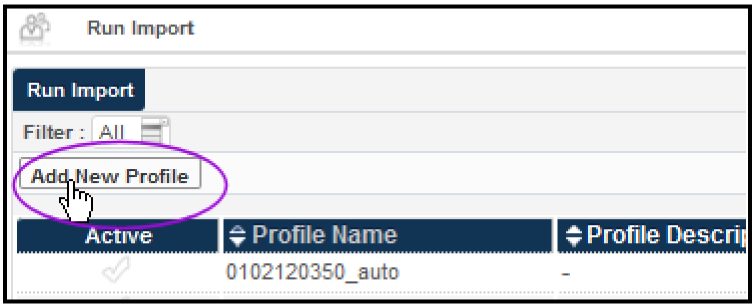


Figure 410: Add New Profile Run Import Page

The Import Profile Details wizard opens (**Figure 411**).

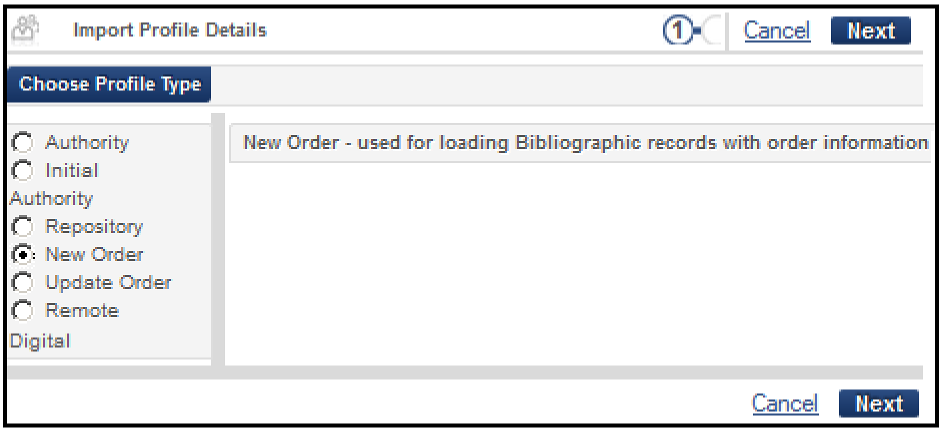


Figure 411: Import Profile Details Wizard - Page 1

2 Select the profile type from the choices listed.

NOTE:
The wizard begins on this page, as indicated by the circled number one (1) at the top of the page. The remaining number of steps in the process depends on the profile type you choose. For example, if you choose Initial Authority (if it is available to you), the wizard is two steps. If you choose New Order, the wizard is seven steps. When you click **Next** after choosing your type, the full number of steps appears as determined by your choice.

3 Click the **Next** button.

The system processes your type selection and displays the remaining number of steps of your profile at the top of the following page (page two of the wizard— **Figure 412**).

Creating the Profile Using the Wizard

After you have selected your **profile type** and clicked the **Next** button, Step 2, the Profile Details form, opens (see **Figure 412**).

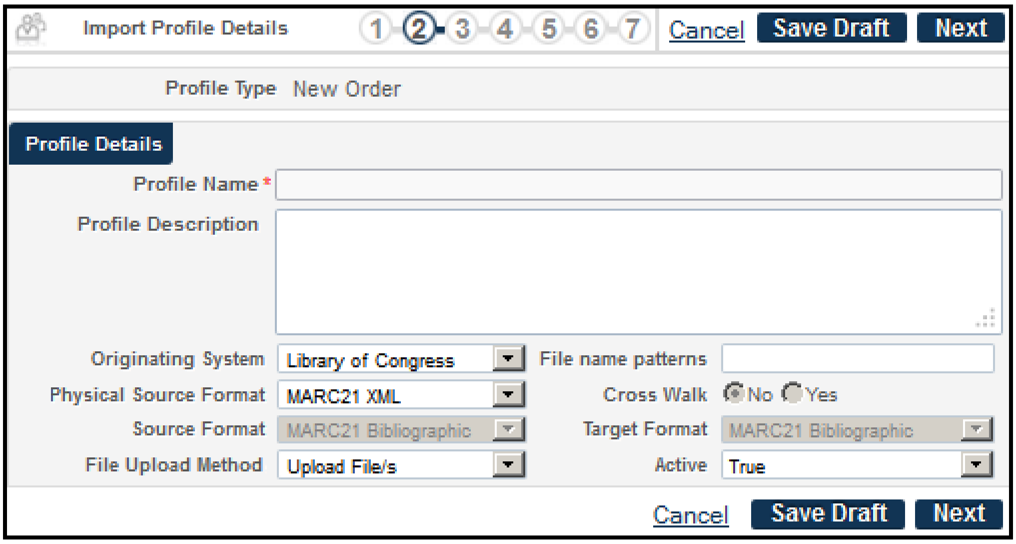


Figure 412: Import Profile Details Wizard - Page 2

NOTE:
This example describes how to create the **New Order** import profile. The information below, however, pertains to all import profile wizards. Where a single field or option applies to only one type of profile, this is noted in the description.

To create the import profile:

1. On the Profile Details page (step 2) of the Import Profile Details wizard (see **Profile Types** on page **512**), enter a name and details for the import profile. Use the following table for information about the fields on this page.

NOTE:
Some of your selections may impact other choices on this form. For example, if you choose **FTP** for **File Upload Method**, two additional sections appear on this form. See **Figure 413**.

These sections are also documented in the table below.

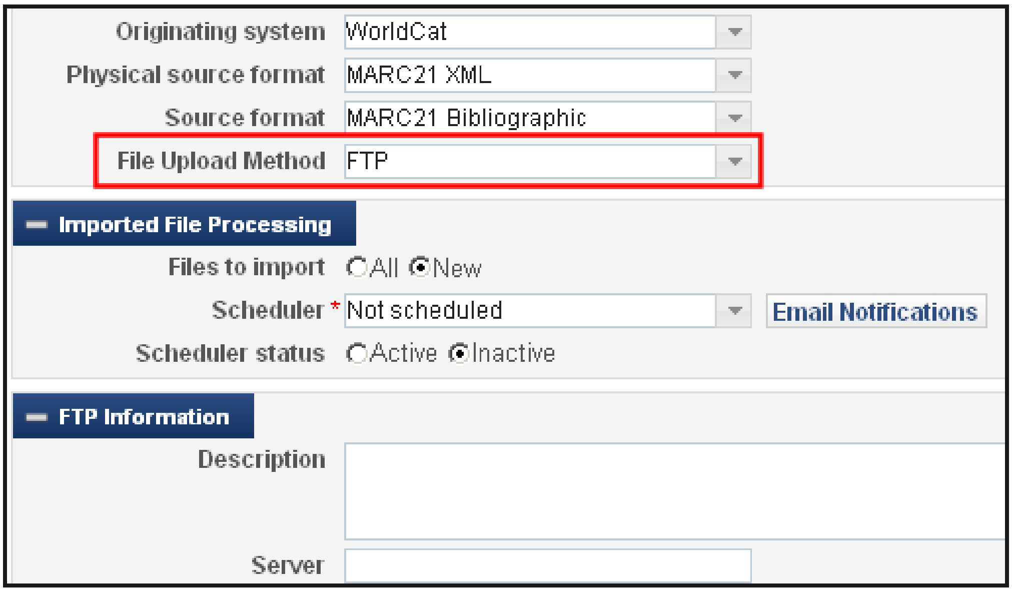


Figure 413: Import Profile Details with FTP as File Upload Method

Table 64. Import Profile Details Wizard - Page 2 Fields

Field	Description
Profile Details section:	
Use Network Zone	For an explanation of this option, see **Working With Import Profiles for the Collaborative Network** in the Alma online help.
Profile name (required)	A name for the profile. The name appears on the list of import profiles in the Profile Name column.

Table 64. Import Profile Details Wizard - Page 2 Fields

Field	Description
Profile description	A free text description of the profile that shows on the list of import profiles in the Profile Description field. Enter salient details that allow you to identify the profile as matching the requirements of a specific EOD file when importing data.
Originating system	The type of originating system such as the Library of Congress or OCLC. The available options are predefined by an Administrator.
Physical source format	The physical source format of the import file. The available options are MARC21 XML or MARC21 Binary. **NOTE:** For the binary format, Alma supports only .mrc files and not .mrk files.
Library (Remote Digital type only)	The library that owns the imported digital resources.
Remote Digital Repository Instance (Remote Digital type only)	The name of the remote digital repository instance used by this profile.
Collection Assignment (Remote Digital type only)	The collection name to which the imported records will be assigned.
Source format (view only)	The source format of the bibliographic, authority, or EOD file, such as MARC21 Bibliographic.
File upload method	The way the bibliographic, authority, or EOD file is to be uploaded to Alma. If FTP is selected, Import Processing and FTP Information must be entered. If Upload File is selected, the file of records to be imported must reside on a local or network drive. If OAI is selected (remote digital only), additional fields and a new section open on the page. For more information, see the OAI Details section.
File name patterns	Enter a file name pattern (such as `*.xml`) if you want to filter out certain records that do not conform to the pattern you specify. For example, FTP loads may contain additional files or records that should not be included in an import.
Cross walk	Currently not in use.

Table 64. Import Profile Details Wizard - Page 2 Fields

Field	Description
Target format (view only)	The format for the target file. For example, Marc21 Bibliographic.
Active	The default is **True**. This means that the import profile can be used. Select **False** from the Active drop-down list if you do not want the import profile to be available for use at this time.
Vocabulary code (Authority and Initial Authority profile types only)	Drop-down: When importing authority records, select a vocabulary code: LCNAMES and LCSH are two options, as is MeSH.
Imported File Processing section: *Appears only if FTP has been selected as the File Upload Method.*	
Files to import	Select **All** for all files found in the FTP location. Select **New** to select only those files that have not yet been imported.
Scheduler	To schedule this import job, select one of the scheduling options from the drop-down list. Examples may include Not scheduled, The 15th of every month, Every 6 hours, Every day at 2am. (The exact time depends on your time zone and the server you are using.)
Email Notifications	Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.
Scheduler status	Select **Active** to put the Scheduler to use, **Inactive** to disable the Scheduler.
FTP Information section: *Appears only if FTP has been selected as the File Upload Method.*	
Description	Enter a description of the FTP submission format that is defined in this section.
Server/Port	Specify the IP address and port of the FTP server sending or receiving the files.
User name/ Password	Enter the username and password for logging on to the server that is sending or receiving the files.
Input directory	Enter the path of the submission format’s input directory.
Max. number of files	Not in use. Accept the default value.

Table 64. Import Profile Details Wizard - Page 2 Fields

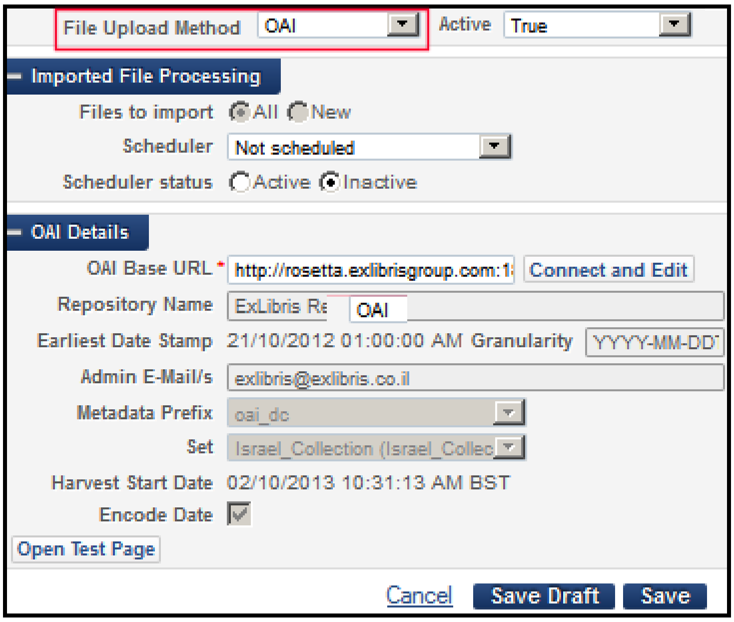
Field	Description
Max file size/Size type	Not in use. Accept the default value.
FTP server secured	Select to use a secure FTP transfer (SFTP)
Test Connection	Click this button to run a test of the FTP connection
Imported File Processing section: *Appears only if OAI has been selected as the File Upload Method.* 	
Files to import	Set by default to All, which means that all records that are returned by the OAI data provider will be processed.
Scheduler	Enables the scheduling of this import job, selecting one of the scheduling options from the drop-down list. Examples may include Not scheduled, The 15th of every month, Every 6 hours, Every day at 2am. (The exact time depends on your time zone and the server you are using.)
Email Notifications	Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.
Scheduler status	Select Active to enable the Scheduler, Inactive to disable the Scheduler.

Table 64. Import Profile Details Wizard - Page 2 Fields

Field	Description
OAI Details section: *Appears only if OAI has been selected as the File Upload Method.*	
OAI Base URL	The OAI provider's URL, which OAI harvesters can use to load metadata.
Connect and Edit button	Refreshes the form with the relevant OAI information.
Repository Name	From the OAI provider, populated by the system when **Connect and Edit** is clicked.
Earliest Date Stamp	The earliest that data exists in the OAI provider records, populated by the system when **Connect and Edit** is clicked
Admin's E-Mail	OAI provider admin's email, populated by the system when **Connect and Edit** is clicked.
Metadata Prefix	The available MD prefixes from the OAI provider, populated by the system when **Connect and Edit** is clicked.
Set	OAI repository available sets, populated by the system when **Connect and Edit** is clicked.
Harvest Start Date	When submitting a new import job and after the job completes successfully, the **Harvest Start Date** is updated automatically with the job's ending time.
Encode Date	If the repository does not support the encoding of dates, clear this check box.
Open Test Page	Allows you to test the OAI connection and flow. See **Testing OAI Flow for a Remote Digital Repository** on page 547.

NOTE:

From this step of the wizard through the last, you can click the **Save Draft** button to save the profile you are creating. The Import Profile Details wizard closes, and the import profile is added to the Run Import page with a Status of Inactive. To continue building the profile or to make additional changes later to the import profile, click **Actions > Edit** in the row of the profile and follow the instructions for **Editing and Viewing Import Profiles** on page 555.

2 When you have entered values in all the fields you need, click **Next**.

(For Initial Authority types, the wizard is completed at this step and you can click **Save**, **Save Draft**, or **Cancel**.)

Page 3 of the Import Profile Details wizard opens (**Figure 414**). This page contains selections for normalization and validation of profile data.

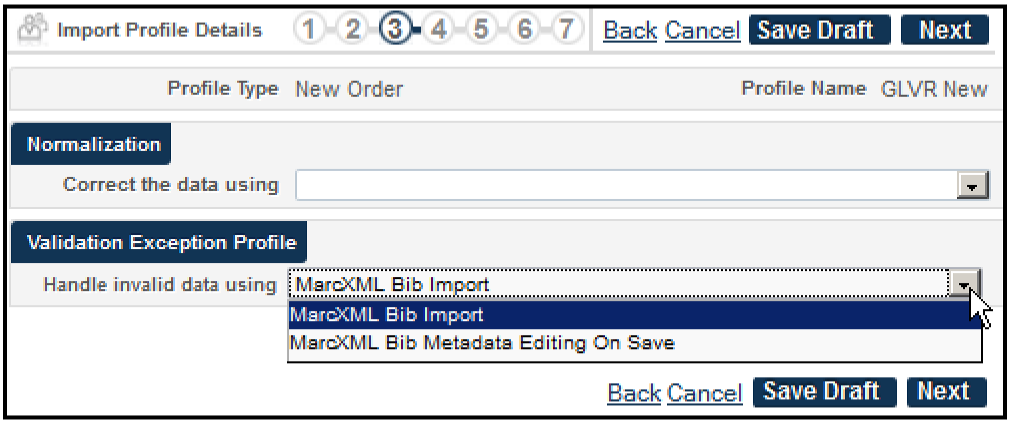


Figure 414: Import Profile Details Wizard - Page 3

The following table describes the Normalization and Validation selections on this page:

Table 65. Import Profile Details Wizard - Page 3 Fields

Field	Description
Normalization section:	
Correct the data using	Predefined normalization rules can be selected with this option as part of the import profile to correct the data. For information on normalization rules, see **Working with Normalization Rules** on page **220**.
Validation Exception Profile section:	
Handle invalid data using	The method used to handle invalid data as it is being imported. For more information, see **Working with Validation Exception Profiles** on page **652**. For import profiles, Ex Libris recommends using the MarcXML Bib Import validation exception profile.

3 Enter information in the fields as needed, then click **Next**.

(For Authority types, the wizard is completed at this step and you can click **Save**, **Save Draft**, or **Cancel**.)

Page 4 of the Import Profile Details wizard opens (**Figure 415**).

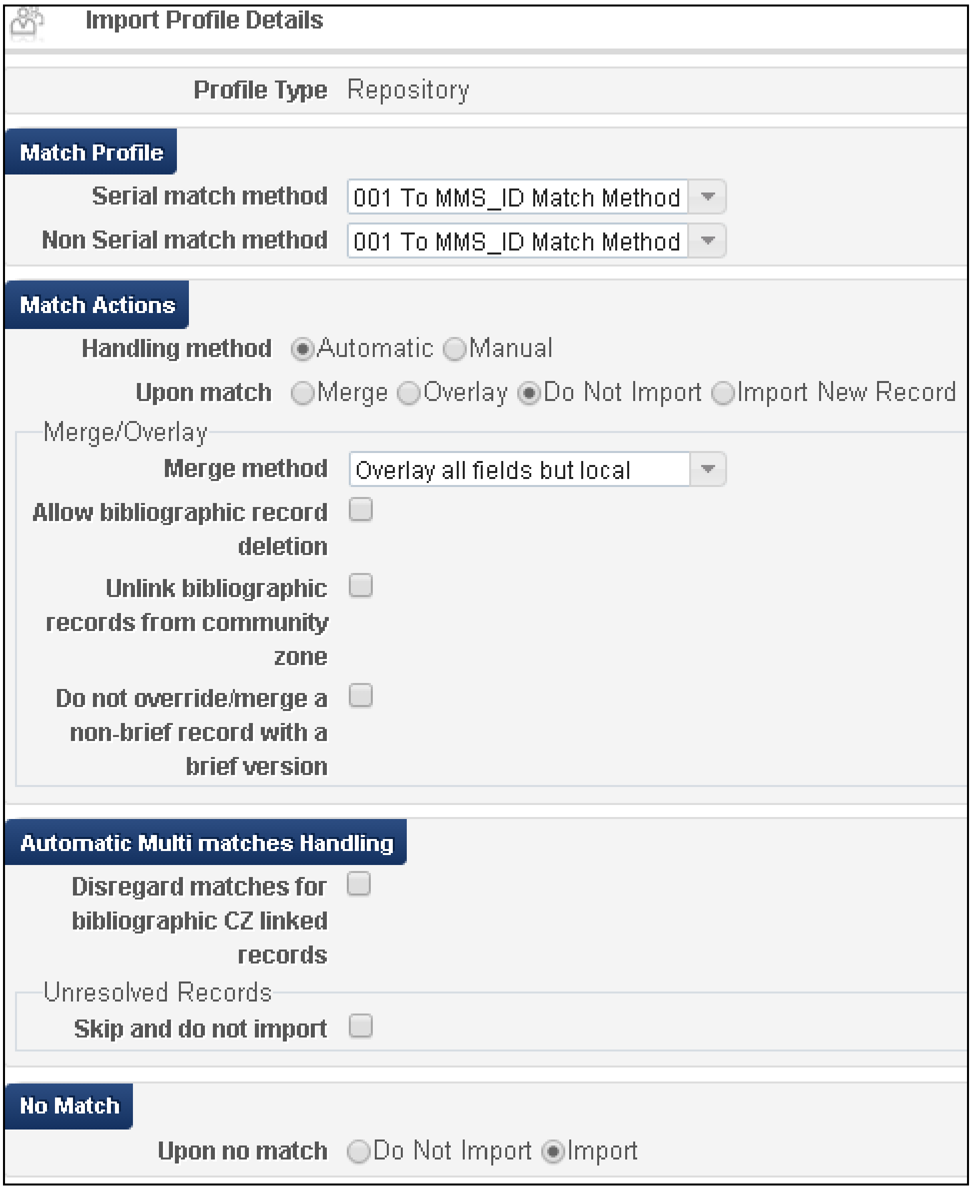


Figure 415: Import Profile Details Wizard - Page 4

Page 4 of the wizard contains information related to profile matching. The following table provides detailed information about the fields.

NOTE:

Fields may vary depending on your selections on previous pages or as you move down the page. Conditions are noted, where relevant, in the table below.

Table 66. Import Profile Details Wizard - Page 4 Fields

Field	Description
Match Profile section: For information on profiles and profile variables, see **Creating the Profile Using the Wizard** on page **517**.	
Serial match method (For Update Inventory type, the field **Match Method** is read-only.)	The method used to match serial data. For a detailed description and examples of some of these methods, see **Match Methods – Explanations and Examples** on page **548**. See also **Understanding the Update Inventory Import Profile** on page **513**.
Non-serial match method (Repository and New Order types only)	The method used to match non-serial data. For a detailed description and examples of some of these methods, see **Match Methods – Explanations and Examples** on page **548**.
Match Actions section:	
Handling method	The method for handling a match. You can select from: ■ **Automatic** (default) - The system resolves the matching according to the selected **Upon match** behavior. If you select this option, additional options are displayed in the **Automatic Multi Matches Handling** section on this page. ■ **Manual** – If the imported bibliographic record has a match in Alma, the import process is set to the status **Manual Handling Required** and the user must choose whether or not to import the record. Note, however, that if there are more than 150 matches, the system operates as if no match has been found and the record is imported.
Upon match	The action to perform when there is a match. You can select from: ■ Import New Record (New Order and Repository only) – The record is imported, but there may be redundant data ■ Do not import (default) (New Order and Repository only) The new record is discarded ■ Merge – Merge the records according to the options chosen in the profile configuration ■ Overlay – Keep the old record only, but change its internal data according to the new record. This enables the history of all of the linking performed for this record to be retained.

Table 66. Import Profile Details Wizard - Page 4 Fields

Field	Description
Match Actions section - **Merge Overlay** subsection:	
Merge method (Applies only when Upon match is set to Merge)	The method used to merge the data. The available predefined options are: ■ Conditional subject headings ■ Overlay all fields but local ■ Replace 245 and 035 OCoLC if exist
Allow bibliographic record deletion	When checked, allows Alma to delete a matching record under the following conditions: ■ The imported record includes a **d** in LDR position 5. ■ No PO line or inventory resources are associated with the bibliographic record. ■ For PDA portfolios, a portfolio that is associated with the bibliographic record has the same PDA ID as the PDA profile. **VIDEO:** Learn how to allow record deletion in import profiles in the *Allow Record Deletion in Import Profiles* video (5:58 mins).
Unlink bibliographic records from Community Zone	Applies to **Upon match** selections **Merge** and **Overlay** only. When checked, the records are handled as separate, local records going forward. **NOTE:** This field appears only if the **ignore_cz_records** parameter is set to **false** in the CustomerParameters mapping table (**Resource Management > Resource Configuration > Configuration Menu > Other Settings**). **VIDEO:** For more information on overlaying community zone records in the network zone, see the *Overlay Community Zone Records in the Network Zone* video (9:51 mins).

Table 66. Import Profile Details Wizard - Page 4 Fields

Field	Description
Do not override/ merge a nonbrief record with a brief version	In order to prevent a situation in which a good quality record is overlaid with a lower quality imported record, this parameter provides additional control when an imported record is overlaid or merged. When you select the **Do not override/merge a non-brief record with a brief record** parameter, Alma uses the brief record algorithm configured by Ex Libris at installation to determine what constitutes a brief record. When this option is selected and the matched record is identified as brief, the imported record will not overlay/merge the matched record. Refer to the **Identifying brief records** description in the table **System-Defined Jobs per Content Type** on page **306** in the *Alma Administration Guide* for more information. **VIDEO:** For more information about preventing a brief record overlay, refer to the *Import Profile: Prevent Overlay by Brief Record* video (6:28 mins).
Automatic Multi Matches Handling section:	
Disregard matches for CZ-linked records	This option instructs Alma to disregard matches for CZ-linked records (that is, bibliographic records in the Institution Zone that are linked to the CZ) and process only matches on local records. This enables Alma to automatically resolve cases in which there is a multiple match because there is both a local and CZ record that match the incoming record. In such a case, only the local record will be considered a match. **NOTE:** This field appears only if the **ignore_cz_records** parameter is set to **false** in the CustomerParameters mapping table (**Resource Management > Resource Configuration > Configuration Menu > Other Settings**).
Automatic Multi Matches Handling section - **Unresolved Records** subsection:	
Skip and do not import	This option instructs Alma not to import multiple matches. Instead of multiple matches being sent to the Matching section of the Resolve Import Issues page, they are added to a new report that has been created (Download records that were skipped due to multi-match automatic handling).

Table 66. Import Profile Details Wizard - Page 4 Fields

Field	Description
No Match section (New Order and Repository types only):	
Upon no match	Select one of the following options when there is no match: ■ Do not import ■ Import The default varies by import profile type.

4 Enter match information in the fields and click **Next**.

Page 5 of the Import Profile Details wizard opens (**Figure 416**).

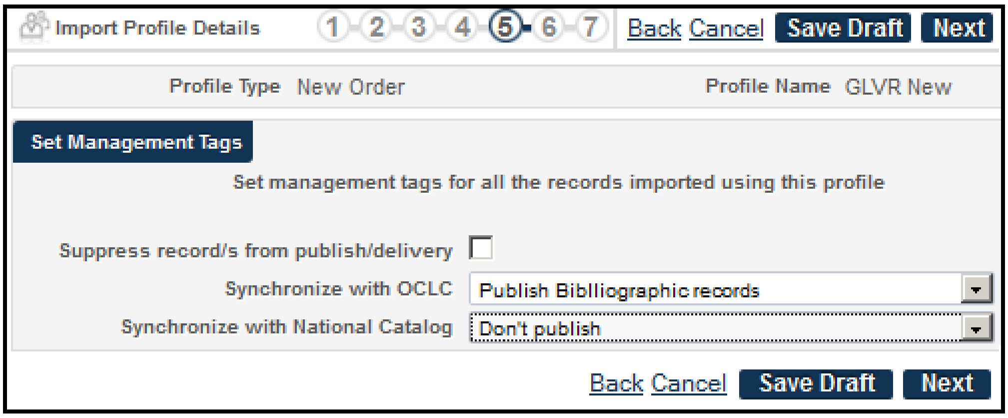


Figure 416: Import Profile Details Wizard - Page 5

Fields on this page determine management tags for all records imported using this profile. See the following table for information on how to make selections.

Table 67. Import Profile Details Wizard - Page 5 Fields

Field	Description
Set Management Tags section:	
Suppress records from publish/delivery	Select the check box if you want to suppress records from publishing or delivery in Primo.
Synchronize with OCLC	Select one of the drop-down menu options for synchronizing with the Online Computer Library Center, Inc. (OCLC) ■ Publish bibliographic records ■ Publish holdings only ■ Don't publish

Table 67. Import Profile Details Wizard - Page 5 Fields

Field	Description
Synchronize with National Catalog	Select one of the drop-down menu options for synchronizing with the National Catalog: ■ Publish bibliographic records ■ Don’t publish

5 Enter set management tag information in the fields and click **Next**.

NOTE:
The Remote Digital profile completes on Step 5 of the wizard and can be saved, closed, and tested. For testing instructions, see **Testing OAI Flow for a Remote Digital Repository** on page **547**

Page 6 of the Import Profile Details wizard opens (**Figure 417**).

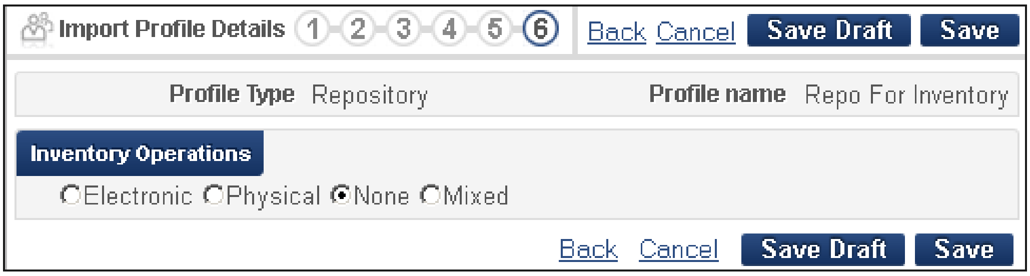


Figure 417: Import Profile Details Wizard - Page 6

6 In the **Inventory Operations** section, select **Electronic**, **Physical**, **None,** or **Mixed** for the type of material being imported.

For **Electronic** inventory, the page refreshes to include new fields for electronic profiles. Options for updating standalone or collected portfolios, using single or multiple URLs, are provided in the E-Book Mapping section of the page. See **Figure 418** and continue with step **a** on page **530**.

For **Physical** inventory, the page refreshes with fields specific to physical materials. See **Figure 419** and continue with step **b** on page **534**.

For **Mixed** inventory, the page refreshes with fields displayed for both electronic and physical inventory, and the fields specific to mixed materials. See **Figure 423** and continue with step **c** on page **540**.

When working with a Repository profile type, you can select the **None** option, which indicates that a bibliographic record of the item is created, but no actual inventory is created. Proceed with step **7** on on page **541**.

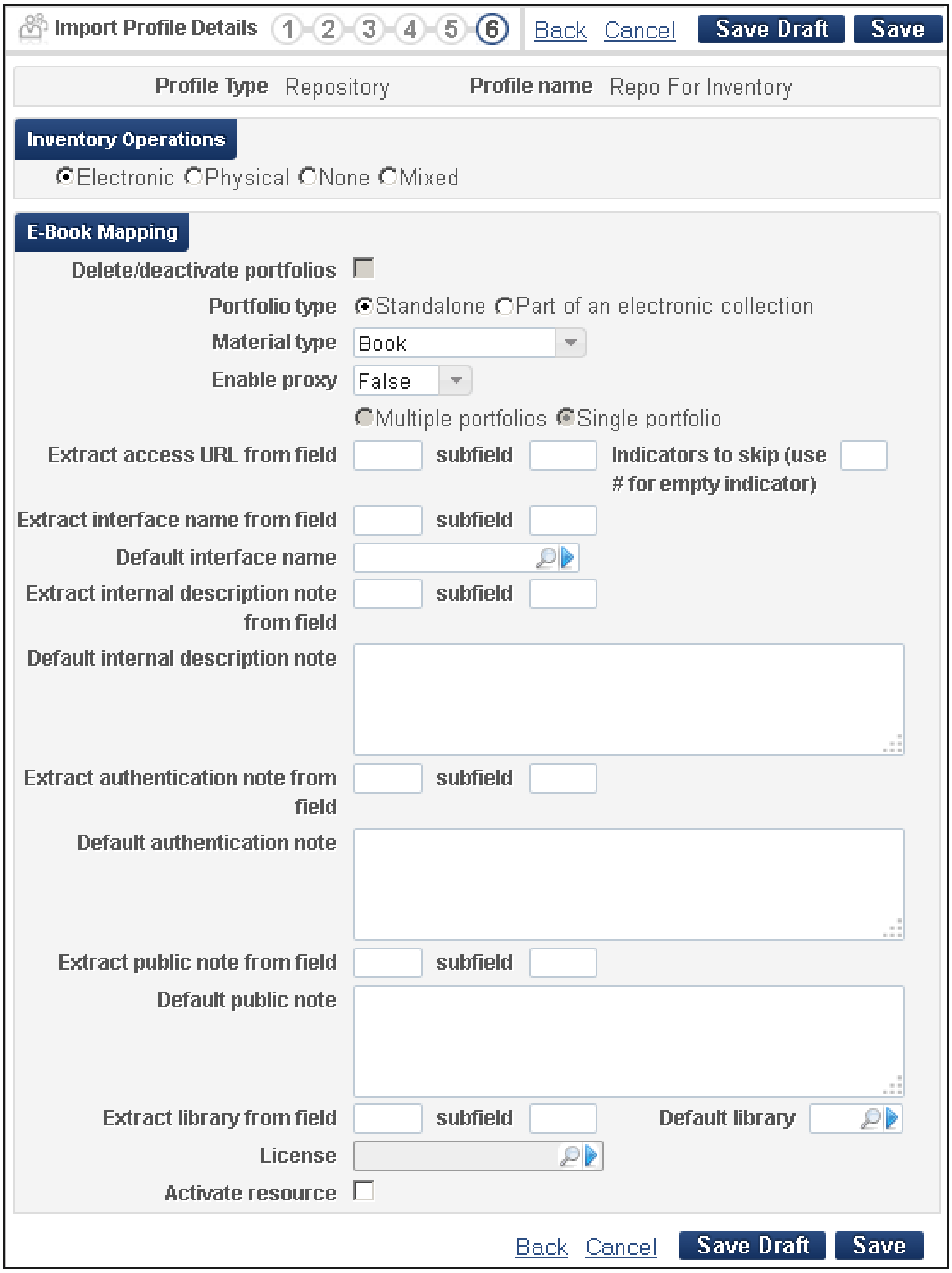


Figure 418: Import Profile Details Wizard - Page 6 Electronic

a Enter information for the E-Book Mapping section using the Electronic Fields table below. When you finish, skip to step 7.

Table 68. Import Profile Details Wizard - Page 6 Electronic Fields E-Book Mapping Section

Field	Description
Delete/deactivate portfolios when bibliographic record marked for delete	Select this option to indicate how to process portfolios when linked bibliographic records are identified for deletion with a `d` in position 5 of the leader. This option is available when: ■ Creating or modifying Repository or Update Inventory import profiles ■ **Allow bibliographic record deletion** has been selected in the Match Profile tab of the import profile (page 4 of the wizard) ■ **Part of an electronic collection** portfolio type has been selected on this tab (Inventory Information, page 6 of the wizard) When the system tries to delete a portfolio and there is a PO line connected, it deactivates the portfolio instead. **NOTE:** A portfolio can be deleted only when there is no PO line connected to it. Import reporting provides information regarding electronic portfolios deactivated during the import process. **VIDEO:** For information about deactivating/ deleting electronic portfolios using by running an import job, see the *Delete/ Deactivate and Electronic Portfolio Using Import Profile* video (7:39 mins).
Portfolio type	**Standalone** or **Part of an electronic collection**. Determines whether the import is handled as standalone inventory (not grouped into an electronic collection) or as part of the selected electronic collection.

Table 68. Import Profile Details Wizard - Page 6 Electronic Fields E-Book Mapping Section

Field	Description
Electronic Collection (for **Part of an electronic collection** Portfolio type only)	Select the electronic collection to which you want to import the portfolios. After you select an electronic collection, Alma refreshes the **Service** drop-down list (see next field entry) to display the relevant services for the selected electronic collection.
Service (for **Part of an electronic collection** Portfolio type only)	Select the appropriate electronic collection service. **NOTE:** All electronic titles in the import file must belong to the same electronic collection service.
Material type	A list of material types for electronic resources (such as Book, CD-ROM, Dissertation, Journal, Musical Score). Select one from the drop-down list.
Enable proxy (for **Standalone** Portfolio type only)	The default is **False**. Select **True** to enable a proxy to redirect the URL. **NOTE:** For **Part of an electronic collection**, the proxy field is hidden. Enabling the proxy is available at the electronic collection level.
Multiple portfolio/Single portfolio	Whether the material to be imported exists in multiple portfolios or in a single portfolio. **NOTE:** Standalone imports do not have the multiple portfolio option. They can only use the single portfolio.
Extract portfolio information from field (for **Multiple portfolio** only)	The MARC field used as the source for gathering information for multiple portfolios
Extract access URL from field and subfield	The field/subfield combination that contains the e-book URL. To have Alma skip fields based on indicators, use indicator pairs separated by commas.
Extract interface name from field/subfield (for **Standalone** portfolio types only)	The MARC field and/or subfield from which to take the interface name.

Table 68. Import Profile Details Wizard - Page 6 Electronic Fields E-Book Mapping Section

Field	Description
Default interface name (for **Standalone** portfolio types only)	The default field if the interface name field in the record is empty. Click the search icon to select from a list of available vendors.
Extract internal description note from field/subfield	The source record's field/subfield that contain(s) the internal description note. Single portfolios can use MARC fields and subfields. Multiple portfolios use only the subfield here and in remaining extractions because the main field has already been entered in **Extract portfolio information from field**.
Default internal description note	The default value if the internal description field in the record is empty. Enter optional text for the internal description field
Extract authentication note from field/subfield	The source record's field/subfield that contain(s) the authentication note. Single portfolios can use MARC fields and subfields. Multiple portfolios use only the subfield here and in remaining extractions because the main field has already been entered in **Extract portfolio information from field**.
Default authentication note	The default value if the authentication notes field in the record is empty. Enter optional text for the authentication notes field.
Extract public note from field/ subfield	The source record's field/subfield that contain(s) the authentication note. Single portfolios can use MARC fields and subfields. Multiple portfolios use only the subfield here and in remaining extractions because the main field has already been entered in **Extract portfolio information from field**.
Default public note	The default value if the public note field in the record is empty. Enter optional text for the public notes field.
Available for field	The field/subfield that determines whether the electronic inventory is available only to some groups and not others. **VIDEO:** Learn more about this feature in the *Assign "Available For" Groups Using an Import Profile* video (6:04 mins).

Table 68. Import Profile Details Wizard - Page 6 Electronic Fields E-Book Mapping Section

Field	Description
Default available for	A drop-down list containing all the groups in the consortium that might have access to inventory. Select one as the default group for this profile.
Activate resource	Select the check box to automatically activate the resource after the import.

For physical inventory, the page refreshes to include new fields for Physical Item Mapping (see **Figure 419**). This section allows you to choose the policy (Advanced or Basic) used to map additional item-level fields from the import records into Alma.

VIDEO:

For more information about the Advanced import option, see the *Add Item- Level Attributes to Import Records* video (3:40 mins).

The following figure shows the fields associated with the Basic mapping policy.

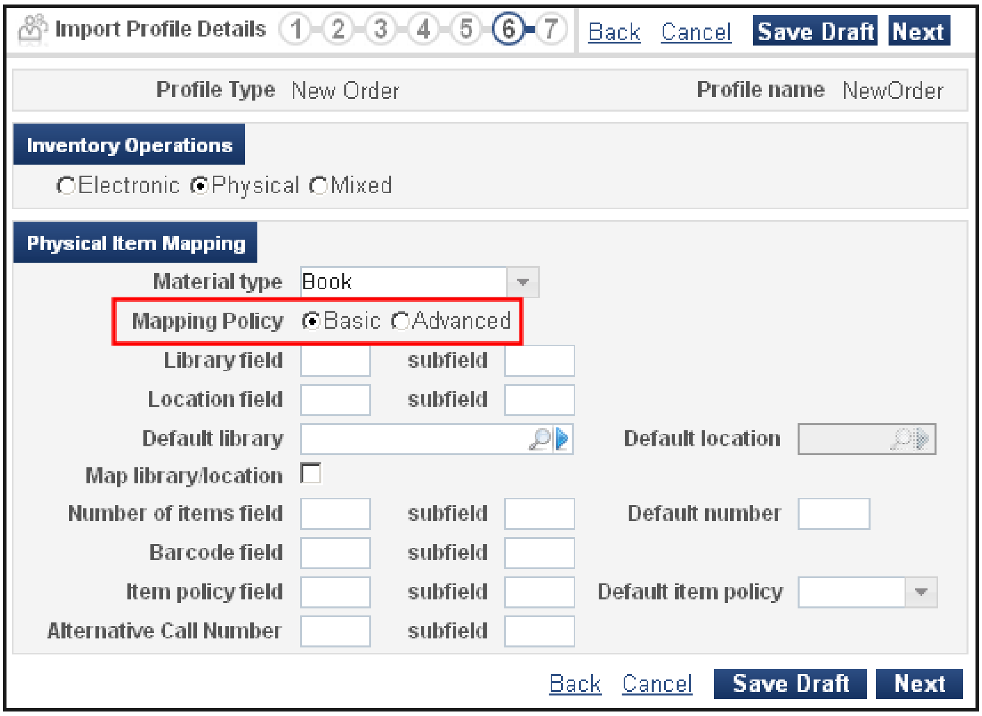


Figure 419: Import Profile Details Wizard - Page 6 Physical (Basic Method)

The following figure shows the fields associated with the Advanced mapping policy.

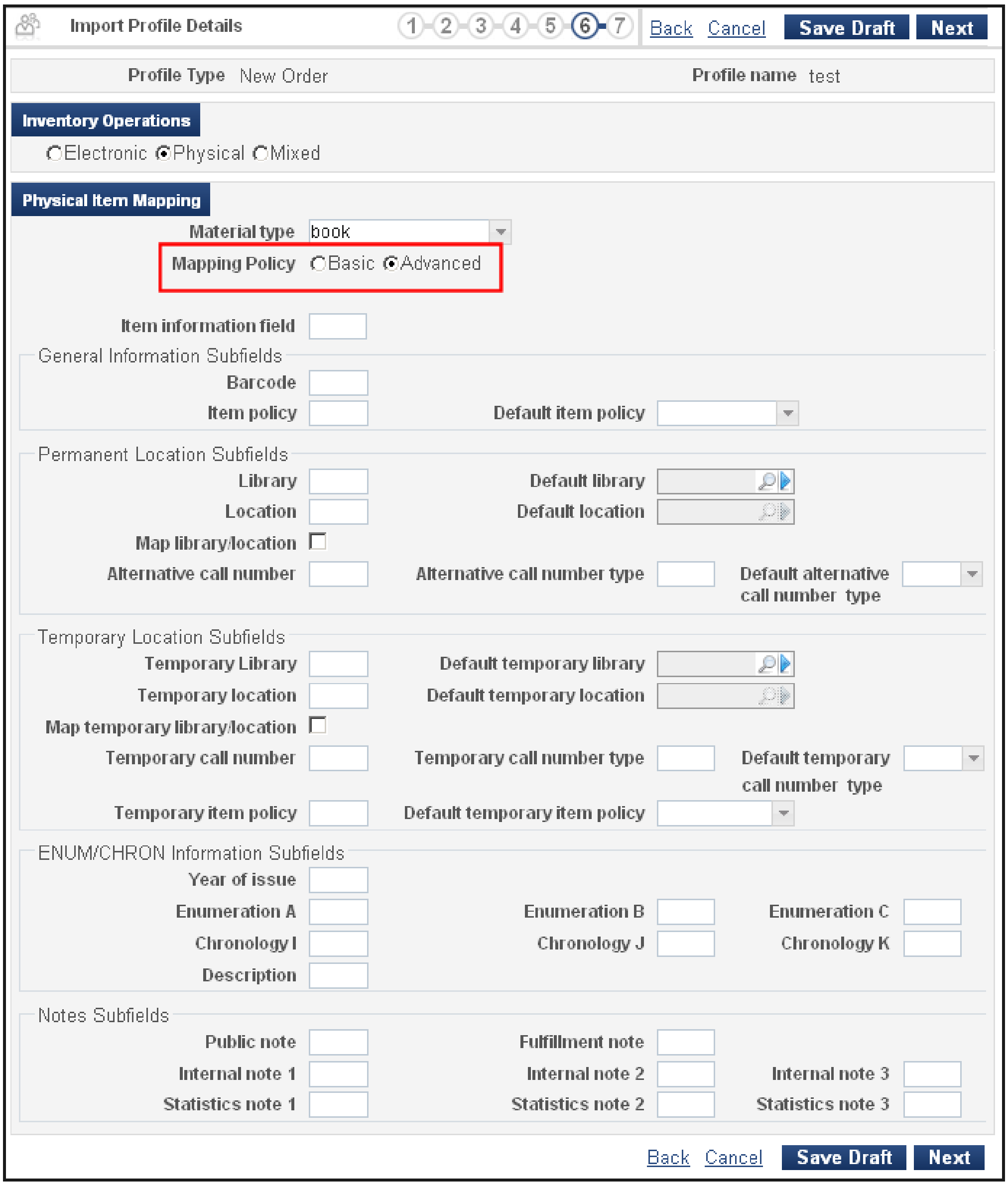


Figure 420: Import Profile Details Wizard - Page 6 Physical (Advanced Method)

b Enter values for the fields using the relevant table below. When you finish, skip to step 7.

NOTE:
If you want to create multiple items in multiple libraries and locations, see **Defining Import Profiles for Multiple Item Creation** on page **560**.

Table 69. Import Profile Details Wizard - Page 6 Physical Fields - Basic Mapping Policy

Field	Description
Physical Item Mapping section (Basic mapping policy):	
Material type	A list of material types for physical resources (such as Art Original, Audiobook, Book, DVD, Transparency). Select one from the drop-down list.
Mapping policy	Select **Basic** to map physical item-level fields from the import records into Alma. Note that the Advanced mapping allows you to load additional information. For more information on Advanced mapping, see the following table.
Library field and subfield (not required)	If the incoming file of bibliographic records contain your library code, you can map it here (for example, if the vendor is sending bibliographic records with your library code in the 999x). If the vendor is using EOD, this field/subfield indicates the library for which the material referenced in the EOD and resulting PO lines will be ordered.
Location field and subfield (not required)	The field/subfield indicating the location in the library for which the material referenced in the EOD and resulting PO lines will be ordered.
Default library	If you are not using the Library Field to map, or if the data is not found in the mapped Library field, this is the default library that will be used for either regular or EOD imports. If you are using EOD, the default library for which the material referenced in the EOD and resulting PO lines will be ordered. Click the search icon to select a library from the available list of libraries.
Default location	If you are not using the Location Field to map, or if the data is not found in the mapped Location field, this is the default location that will be used for either regular or EOD imports. If you are using EOD, the default location is the library for which the material referenced in the EOD and resulting PO lines will be ordered. Click the search icon to select a location from the available list of locations.
Map library/ location	Select the check box if you want to map the library location. If you select this check box, you must enter the **Location Mapping** after you save the import profile (see step 3 on page 557).
Number of items field and subfield	The field/subfield found in the incoming bibliographic record that stores the number of items (not required, will use default if not entered).
Default number	The default number to assign if the **Number of items** field is empty.

Table 69. Import Profile Details Wizard - Page 6 Physical Fields - Basic Mapping Policy

Field	Description
Barcode field and subfield	The field/subfield found in the incoming bibliographic record that stores the barcode (not required, will use default if not entered).
Item policy field and subfield	The field/subfield used by incoming bibliographic records to map copies to specific locations. **NOTE:** Field and subfield must be entered as codes.
Alternative Call Number	Add an item level alternative call number. This is useful to keep track of a group of items that are placed in a special location, for example. This option is available when creating New Order, Update Inventory, and Repository profiles. The alternative call number type is taken from the call number type defined for the location. When running the import profile, this field is updated with its default value.
Call Number Mapping section:	
Update holdings call number	Select the check box to enable the update of a holdings record with the call number that is part of an imported bibliographic record.

Table 70. Import Profile Details Wizard - Page 6 Physical Fields - Advanced Mapping Policy

Field	Description
Physical Item Mapping section (Advanced mapping policy):	
Material type	A list of material types for physical resources (such as Art Original, Audiobook, Book, DVD, Transparency). Select one from the drop-down list.
Mapping policy	Select **Advanced** if you want to map temporary location information, enumeration and chronology subfields, and notes subfields as well as the information that the Basic mapping policy supports. For more information on the Basic mapping policy, see the previous table.
Item information field	Specify the field from which you want to map item-level information from the input records. Unlike the basic mapping option, all subfields are taken from a single field in the input record.
General Information Subfields subsection:	
Barcode	The subfield that contains the barcode.
Item policy	The subfield that contains the item's policy.

Table 70. Import Profile Details Wizard - Page 6 Physical Fields - Advanced Mapping Policy

Field	Description
Default item policy	The item policy that is mapped by default if the item's policy is empty in the input record.
Permanent Location Subfields subsection:	
Library	The subfield that contains the library information.
Location	The subfield that contains the location information.
Default library	The library that is mapped by default if the item's library information is empty in the input record.
Default location	The location that is mapped by default if the item's location information is empty in the input record.
Map library/location	Select the check box if you want to map the library location. If you select this check box, you must enter the **Location Mapping** after you save the import profile (see step 3 on page 557).
Alternative call number	The subfield that contains the alternative call number.
Alternative call number type	The subfield that contains the alternative call number type.
Default alternative call number type	The alternative call number type that is mapped by default if the alternative call number type is empty in the input record.
Temporary Location Subfields subsection:	
Temporary library	The subfield that contains the temporary library information.
Default temporary library	The temporary library that is mapped by default if the item's library information is empty in the input record.
Temporary location	The subfield that contains the temporary location information.
Default temporary location	The temporary location that is mapped by default if the item's location information is empty in the input record.
Map temporary library/location	Select this check box if you want to map the library location. If you select this check box, you must enter the location mapping in the Mapping tab.
Temporary call number	The subfield that contains the temporary call number.

Table 70. Import Profile Details Wizard - Page 6 Physical Fields - Advanced Mapping Policy

Field	Description
Temporary call number type	The subfield that contains the temporary call number type.
Default temporary call number type	The temporary call number type that is mapped by default if the temporary call number type is empty in the input record.
Temporary item policy	The subfield that contains the temporary item policy.
Default temporary item policy	The temporary item policy that is mapped by default if the item's item policy is empty in the input record.
ENUM/CHRON Information Subfields section:	
Year of issue	The subfield that contains the year of issue.
Enumeration A, B, and C	The subfields that contain the enumerations.
Chronology I, J, K	The subfields that contain the chronologies.
Description	The subfield that contains the description.
Notes Subfields section:	
Public note	The subfield that contains the public note.
Fulfillment note	The subfield that contains the fulfillment note.
Internal note 1, 2, and 3	The subfields that contain the internal notes.
Statistics note 1, 2, and 3	The subfields that contain the statistics notes.
Call Number Mapping section:	
Update holdings call number	Select the check box to enable the update of a holdings record with the call number that is part of an imported bibliographic record.

NOTE:

The format of the file when using the advanced mapping is such that every item is represented by the occurrence of a specific field and all of the item's attributes are represented by the field's subfields.

The following figures show an example of an import profile definition and a sample import profile:

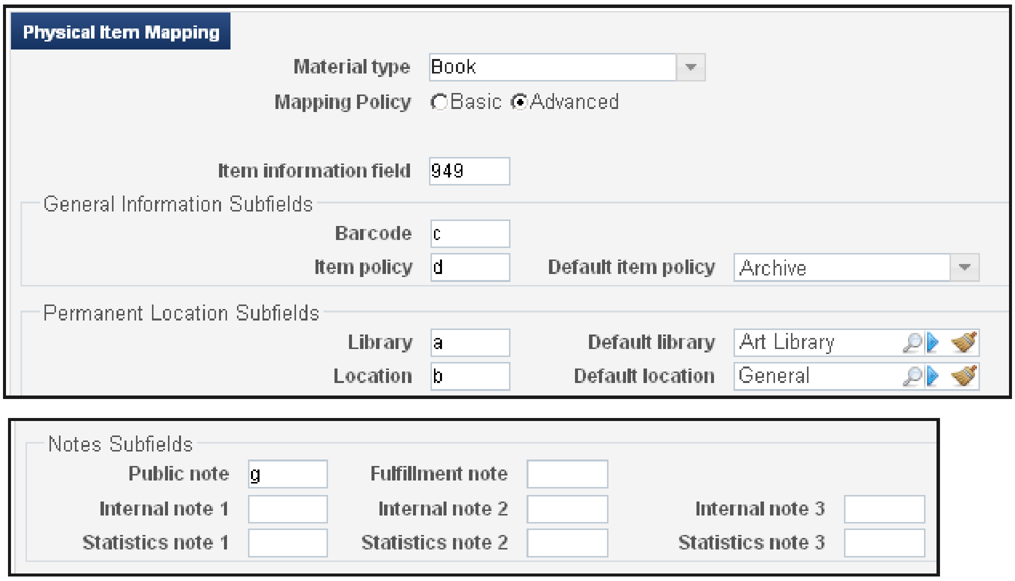


Figure 421: Import Profile Details - Advanced Inventory Mapping Example

```
<marc:datafield tag="949" ind1="" ind2="">
    <marc:subfield code="a">ART</marc:subfield>
    <marc:subfield code="b">GEN</marc:subfield>
    <marc:subfield code="c">12345</marc:subfield>
    <marc:subfield code="d">DEPOT</marc:subfield>
    <marc:subfield code="g">public note for first item</marc:subfield>
</marc:datafield>
<marc:datafield tag="949" ind1="" ind2="">
    <marc:subfield code="a">LAW</marc:subfield>
    <marc:subfield code="b">GEN</marc:subfield>
    <marc:subfield code="C">123456</marc:subfield>
    <marc:subfield code="d">ARCHIVE</marc:subfield>
    <marc:subfield code="g">public note for second item</marc:subfield>
</marc:datafield>
```

Figure 422: Sample Import Profile

For mixed inventory, the page refreshes with fields for both electronic and physical inventory as well as fields specific to mixed materials (see **Figure 423**).

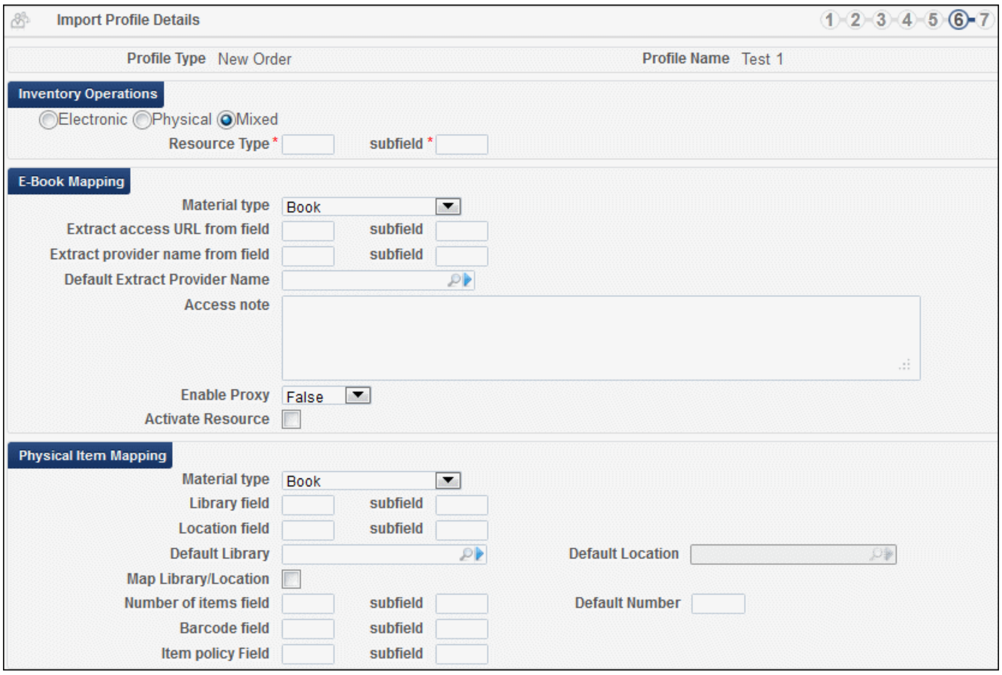


Figure 423: Import Profile Details Wizard - Page 6 Mixed

c In the **Inventory Operations** section, enter the values in the **Resource type** (MARC 21 field number) and **subfield** fields to indicate the field in the EOD file to be referenced to determine the material type being imported. The specified **subfield** must reference a field in the EOD file that contains one of the following values:

- **E** – Indicates that the resource being imported is electronic
- **P** – Indicates that the resource being imported is physical

NOTE:
These field values are case sensitive.

For details on the fields in the **E-Book Mapping** section, see **Table 68**.

For details on the fields in the **Physical Item Mapping** section, see **Table 69**.

VIDEO:
For information about importing both physical and electroinc records using a single import profile, see the *Importing Physical and Electronic Material in One File* video (5:00 mins).

7 When you have finished entering values for the material type, click **Next**.

(For Repository profile types, the wizard is completed at this step and you can click **Save**, **Save Draft**, or **Cancel**.)

Page 7 of the Import Profile Details wizard opens. This page contains PO line information and instructions for the profile (see **Figure 424**). It applies only to New Order profile types and Update Inventory profile types. For the Update Inventory profile type, it may appear as a page 6 in the wizard (because the Set Management Tags step is not needed).

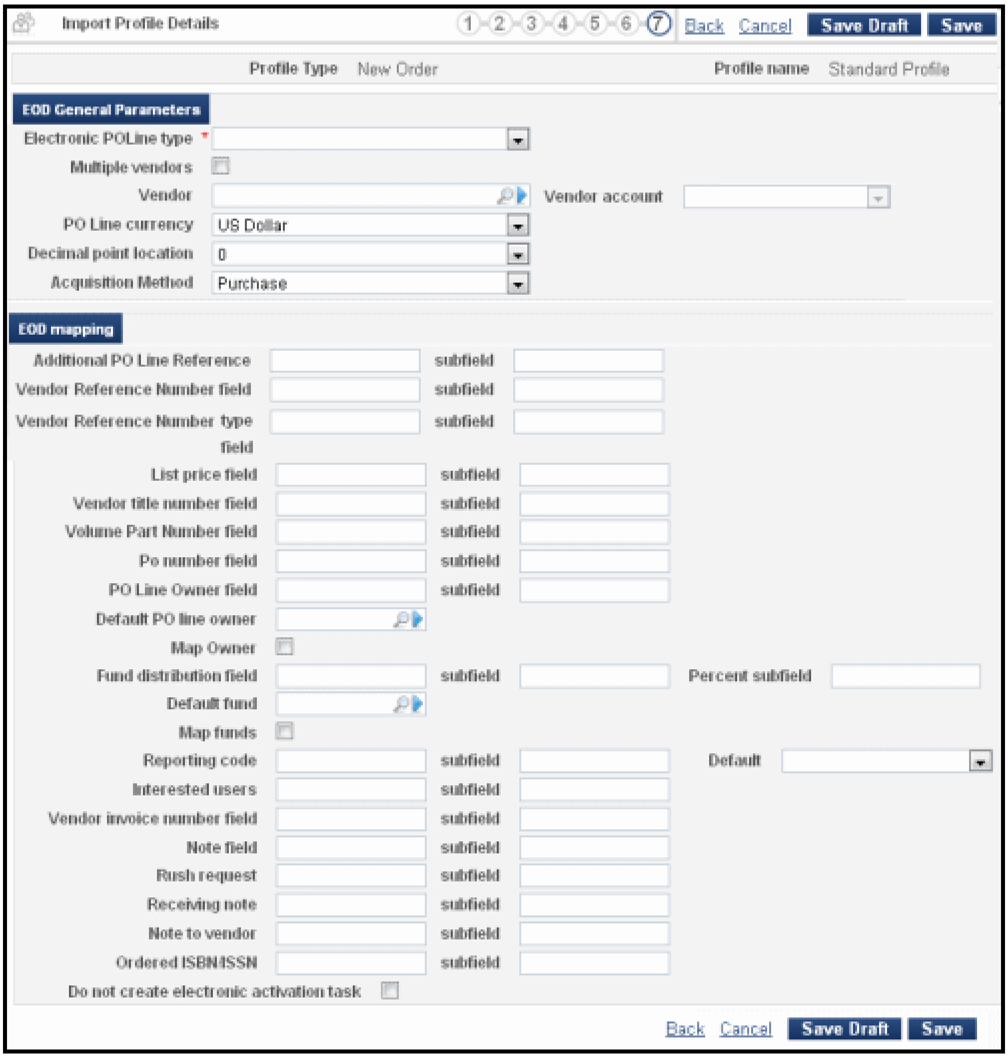


Figure 424: Import Profile Details Wizard - Page 7 - Electronic

8 Enter the EOD general parameters and mapping information. Use the following table for information about the fields:

Table 71. Import Profile Details Wizard - Page 7 Electronic/Physical Fields

Section	Field	Description
EOD General Parameters	Electronic PO line type (required)	Displayed when either **Electronic** or **Mixed** is selected in the Inventory Operations section on page 6 of the wizard (see step **6** on page **529**). Indicates the type of electronic material for the PO line. Options are predefined by an Administrator and may include electronic books, maps, journal subscriptions, sound recordings, and remote files. For a detailed explanation of the PO line types and their ramifications for the order workflow and inventory, see **Explanation of Purchase Types Workflow and Inventory** in the *Alma Acquisitions Guide*.
	Physical PO line type (required)	Displayed when either **Physical** or **Mixed** is selected in the Inventory Operations section on page 6 of the wizard (see step **6** on page **529**). Indicates the type of physical material for the PO line. Options are predefined by an Administrator and may include microforms, printed books or journals, computer disks, mixed media, or original manuscripts. For a detailed explanation of the PO line types and their ramifications for the order workflow and inventory, see **Explanation of Purchase Types Workflow and Inventory** in the *Alma Acquisitions Guide*.

Table 71. Import Profile Details Wizard - Page 7 Electronic/Physical Fields

Section	Field	Description
	Multiple vendors	Select to configure New Order import profiles for multiple vendors. This is necessary for cases in which an order is fulfilled by a third party that sends the order to multiple vendors. Configuring New Order import profiles for multiple vendors allows Alma to read EOD files that contain data from multiple vendors. When selected, the **Map vendors** check box, **Vendor field** and **subfield**, and **Vendor account** field and **subfield** fields appear. **VIDEO:** For more information on Multiple Vendors, see the *Multiple Vendors in EOD Import File* video (8:56 mins).
	Map vendors	Appears when the **Multiple vendors** check box is selected. Select to map the vendor name as it appears in Alma with the vendor name as it appears in the EOD file. If you select this check box, you must enter the **Vendor Mapping** after you save the import profile (see step 3 on page 557).
	Vendor field/subfield	Appears when the **Multiple vendors** check box is selected. Enter the vendor field and subfield numbers that indicate where in the EOD file the vendor names are located.
	Vendor account field/ subfield	Appears when the **Multiple vendors** check box is selected. Enter the vendor account field and subfield numbers that indicate where in the EOD file the vendor account is located.

Table 71. Import Profile Details Wizard - Page 7 Electronic/Physical Fields

<table>
<tr><th>Section</th><th>Field</th><th>Description</th></tr>
<tr><td></td><td>Vendor</td><td>The vendor to whom the PO is eventually sent. Click the Find button to select a vendor from the displayed list of vendors.</td></tr>
<tr><td rowspan="4"></td><td>Vendor account</td><td>The particular vendor account used by the Vendor. Click the Find button to select a vendor account from the displayed list of vendor accounts.</td></tr>
<tr><td>PO line currency</td><td>The currency for the PO line.</td></tr>
<tr><td>Decimal point location</td><td>The location of the decimal point in the price of the material for the PO line. For example, if your vendor enters the price as “1000” for $10.00, enter 2 decimals. If they enter the price as “10.00,” leave the decimal location at 0.</td></tr>
<tr><td>Acquisition method</td><td>The type of acquisition method for the PO line. For detailed information on acquisition methods, see Table 3 in the Alma Acquisitions Guide.</td></tr>
<tr><td rowspan="8">EOD Mapping</td><td>Additional PO Line Reference and subfield</td><td rowspan="8">Map these fields to the appropriate EOD field/subfield as described in Working with EOD Field Mapping on page 552

NOTE:
The PO Line and Vendor reference number fields can be used as match points for vendor orders containing updates to inventory.


This can be done using the Update Inventory profile. For more information, see Understanding the Update Inventory Import Profile on page 513.</td></tr>
<tr><td>Vendor reference number field and subfield</td></tr>
<tr><td>Vendor reference number type field and subfield</td></tr>
<tr><td>List price field and subfield</td></tr>
<tr><td>Vendor title number field and subfield</td></tr>
<tr><td>Volume part number field and subfield</td></tr>
<tr><td>PO number field and subfield</td></tr>
<tr><td>PO line owner field and subfield</td></tr>
</table>

Table 71. Import Profile Details Wizard - Page 7 Electronic/Physical Fields

Section	Field	Description
EOD Mapping (continued)	Default PO line owner	The organization unit responsible for the PO line. Click the **Find** button to select an organizational unit from the displayed list of organizational units.
	Fund distribution field	Map these fields to the appropriate EOD field/subfield as described in **Working with EOD Field Mapping** on page 552.
	Name subfield	
	Percent subfield	
	Default fund	The fund that will be funding the PO. Click the **Find** button to select a fund from the displayed list of funds.
	Map funds	Select the check box if you want to map the vendor fund to another fund. If you select this check box, you must enter the **Fund Mapping** after you save the import profile (see step 2 on page 557.
	Reporting code	Map these fields to the appropriate EOD field/subfield as described in **Working with EOD Field Mapping** on page 552.
	Interested users	
	Vendor invoice number	
	Do not create e-task	Select the check box to indicate that Newly created PO lines will proceed through the duration of the workflow without requiring manual changing of the PO line status.
	Rush request	The MARC field/subfield that determine that the order should be treated as a rush. Valid values for a rush order are `Y, y, TRUE, True, affirmative`.
	Receiving note	The MARC field/subfield that contains the text of the receiving note for the EOD.
	Note to vendor	The MARC field/subfield that contains the text of a note for the vendor. This field maps to the PO line Notes tab.

Table 71. Import Profile Details Wizard - Page 7 Electronic/Physical Fields

Section	Field	Description
EOD Mapping (continued)	Ordered ISBN/ISSN	The ISBN field/subfield that contains the identifier for the item you are mapping in the EOD. The identifier that is referenced by this field displays on the PO Line Summary page (see **Figure 12** in **Manually Creating a PO Line** in the *Alma Acquisitions Guide*).

9 Click **Save**. The new import profile is saved and appears on the Run Import page.

Testing OAI Flow for a Remote Digital Repository

If you are using OAI as your File upload method, you may run a test check that demonstrates the import profile flow in the following steps:

1 Connect to the OAI base URL.

2 Harvest a single record.

3 Convert a record to a marc21 format record.

4 Generate a digital remote representation resource .

Select test options:

- **Test by ID** – Enter a full record identifier and harvest this record.
- **Test First Record** – Harvest the first record in the set.
- **Test Random Record** – Harvest a random record in the set.

If the flow failed, an error will appear in the **Status** field.

If the flow passed successfully, it will return:

- Status – indicates that process passed successfully
- Record Identifier
- Link to remote file (according to the setting defined in the Object Template of the Remote Digital Repository set for this profile - see **Delivery (Wizard Step 3)** on page **693**)
- Link to thumbnail object (according to setting defined in Thumbnail Template set for this profile - see **Delivery (Wizard Step 3)** on page **693**)
- Source record – original record that was harvested
- Marc record – the bibliographic record received after converting to marc21 format

- Inventory structure – an xml structure of generated digital remote representation

Match Methods – Explanations and Examples

Match methods are used to determine the circumstances in which an incoming record is considered to be a duplicate of an existing record.

NOTE:
Alma matches serial records with serial records and non-serial records with non-serial records.

The following serial match methods are available:

Table 72. Serial Match Methods

Field	Description
001 to MMS ID Match Method (predefined by Ex Libris)	Matches based on the Alma ID. To be used when importing a record that was previously exported from Alma.
Fuzzy Serial Match Method	Uses the following algorithm: Alma attempts to find records with at least one of the following matching IDs: ■ ISSN ■ ISBN ■ LCCN ■ CODEN ■ OCLC unique number ■ Other system number If no matches are found through this attempt: ■ If the incoming record has authors, Alma attempts to find records that have at least one matching combination of title + author. ■ If the incoming record does not have authors, Alma attempts to find records that have at least one matching title. If no matches are found in either attempt, Alma issues a message that no matches have been found.
ISSN 024/035 Match Method	Matches based on any one of the following fields: 022, 024, or 035. If a field contains several values, any one of the values is used to match. The 022 and 035 fields are checked first.

Table 72. Serial Match Methods

Field	Description
024/035 Match Method	Matches based on the 024 or 035 fields. If a field contains several values, any one of the values is used to match.
ISSN Match Method	Matches based on the 022 field only.
LCCN Serial Match Method	Matches based on the 010a field only.
035 (Other System Identifier)	Matches based on the system control number that uses any 035 field. If the 035 field contains several values, any one of these values is used to match. Note that the values in the input file and the library record, including contents in parentheses, must be identical (although the contents in parentheses do not have to be a recognized OCLC prefix).
Unique OCLC Identifier Match Method	This method attempts to locate matching records based on a matching OCLC prefix and number. Any one of the following prefixes in the 035 field, subfields a or z, regardless of any zero-padded data is considered to be the same for matching purposes: **(OCoLC)**, **ocm**, **ocn**, or **on**. (In other words, the OCLC prefix in the library record and in the input file do not have to be identical in order for a match to be made.)

The following non-serial match methods are available:

Table 73. Non-Serial Match Methods

Field	Description
001 to MMS ID Match Method (predefined by Ex Libris)	Matches based on the Alma ID. To be used when importing a record that was previously exported from Alma.

Table 73. Non-Serial Match Methods

Field	Description
Fuzzy Non-serial Match Method	Uses the following algorithm: Alma attempts to find records with at least one of the following matching IDs: ■ ISSN ■ ISBN ■ LCCN ■ CODEN ■ OCLC unique number ■ Other system number If no matches are found through this attempt: ■ If the incoming record has authors, Alma attempts to find records that have at least one matching combination of title + author. ■ If the incoming record does not have authors, Alma attempts to find records that have at least one matching title. If no matches are found in either attempt, Alma issues a message that no matches have been found.
ISBN 024/035 Match Method	Matches based on any one of the following fields: 020, 024, or 035. If a field contains several values, any one of the values is used to match. The 020 and 035 fields are checked first.
024/035 Match Method	Matches based on the 024 or 035 fields. If a field contains several values, any one of the values is used to match.
ISBN Match Method	Matches based on the 020 field only.
LCCN Match Method	Matches based on the 010a field only.
035 (Other System Identifier)	Matches based on the system control number that uses any 035 field. If the 035 field contains several values, any one of these values is used to match. Note that the values in the input file and the library record, including contents in parentheses, must be identical (although the contents in parentheses do not have to be a recognized OCLC prefix). For a comparison of the way in which this match method and the Unique OCLC Identifier Match Method work, see

Table 73. Non-Serial Match Methods

Field	Description
Unique OCLC Identifier Match Method	This method attempts to locate matching records based on a matching OCLC prefix and number. Any one of the following prefixes in the 035 field, subfields a or z, regardless of any zero-padded data is considered to be the same for matching purposes: **(OCoLC)**, **ocm**, **ocn**, or **on**. (In other words, the OCLC prefix in the library record and in the input file do not have to be identical in order for a match to be made.)

NOTE:
The F numbers (such as F1, F2, F3) are for internal purposes only and should be disregarded.

Comparison Between 035 (Other System Identifier and Unique OCLC Identifier Match Methods

The following table compares these two match methods.

NOTE:
The text **ocm**, without parentheses, is an OCLC prefix. The text **(ocm)**, with parentheses, is not an OCLC prefix.

Table 74. Comparison Between 035 (Other System Identifier and Unique OCLC Identifier Match Methods

Value in Library Record	Value in Input File	Unique OCLC Identifier Match Method	035 (Other System Identifier) Match Method
035 $$a(OCoLC)2014031801	035 $$a2014031801	No match	No match
035 $$a(OCoLC)2014031801	035 $$aocm2014031801	Match	No match
035 $$a(OCoLC)2014031801	035 $$a(ocm)2014031801	No match	No match
035 $$a(OCoLC)2014031801	035 $$a(OCoLC)2014031801	Match	Match
035 $$a(apple)2014031801	035 $$a2014031801	No match	No match
035 $$a(apple)2014031801	035 $$a(orange)2014031801	No match	No match
035 $$a(apple)2014031801	035 $$a(apple)2014031801	No match	Match

Table 74. Comparison Between 035 (Other System Identifier and Unique OCLC Identifier Match Methods

Value in Library Record	Value in Input File	Unique OCLC Identifier Match Method	035 (Other System Identifier) Match Method
035 $$a2014031801	035 $$a(OCoLC)2014031801	No match	No match
035 $$a2014031801	035 $$a2014031801	No match	Match

Working with EOD Field Mapping

A user with the appropriate role can import EOD files to the Alma repository. The records are loaded into the Metadata Management System and the order-related data is extracted from the record to create PO lines, POs, and inventory records. The relevant information for ordering is determined by the MARC fields/subfields provided by the vendors' EOD records. Certain parameters may be fixed by the import profile.

Alma supports the configuration of EOD import profiles, which are customized according to the fields and codes used in the vendor-supplied EOD file.

The mapping described in the following table is for the generic 949 profile, but the set of Target fields in the Alma PO line may be mapped from your own source fields.

Table 75. EOD Field Mapping

Source Field	Target Field in PO Line	Data Restriction
949‡1	Standard number type	Currently ISBN, ISSN, or ISAN
949‡2	Standard number	Free text
949‡3	Vendor title number	Free text
949‡4	Vendor reference number type	Valid type from code table vendor reference number type
949‡5	Vendor reference number	Free text, optional
949‡a	Volume/part number	Free text, optional

Table 75. EOD Field Mapping

Source Field	Target Field in PO Line	Data Restriction
949‡b	PO line reference	For new orders, cannot be the same reference as an already existing PO line at the same organizational unit. For Update Inventory, this should match the PO line whose shelf-ready inventory you want to update.
949‡c	PO number	Free text
949‡d	Note	Free text
949‡e	Reporting code	Value must be synchronized between vendor and institution
949‡f	Needed by date	Valid date For example: 2010-09-30
949‡g	Interested users	Value must be synchronized between vendor and institution
949‡h	PO line type	Valid type taken from the PO Line Type table For example, DVD
949‡i	DVD format	Free text
949‡j	DVD region code	Free text
949‡k	Vendor invoice number	Value must be synchronized between vendor and institution
949‡m	Vendor account	Valid vendor account code
949‡n	Binding	Free text
949‡o	Quantity (repeatable) (required)	Number, quantity, and locations are repeated in couples.
949‡r	Rush Yes or No	Used to specify when it is a rush order. **Yes** means process the order on a rush basis.
949‡s	List price	Number with decimal point For example, 27.90
949‡t	Physical shelving location (repeatable)	Valid location code

Table 75. EOD Field Mapping

Source Field	Target Field in PO Line	Data Restriction
949‡u	Fund code	Valid fund code
949‡v	Vendor	Valid vendor code
949‡w	Percent	Number
949‡x	Ownership (required)	Valid organizational unit code
949‡z	PO line currency	Valid currency ISO code that is supported by this organizational unit

The load logic is based on the following:

- If a 949 field contains a ‡1, it must contain a ‡2, and vice versa.
- If a 949 field contains a ‡4, it must contain a subfield ‡5, and vice versa.
- If a 949 field contains a sequence of ‡o‡t pairs, none of the pairs may be incomplete. If the EOD contains a ‡o, it must be immediately followed by a ‡t. The only exception is that a ‡o containing a quantity can be alone in the record if it is the only ‡o in the field and there is not a ‡t.
- If a 949 field contains a sequence of ‡u‡w pairs, none of the pairs may be incomplete. If the EOD contains a ‡u, it must be immediately followed by a ‡w. The only exception is that a ‡u containing a fund can be alone in the record if it is the only ‡u in the field and there is not a ‡w.
- All the quantities in the 949‡o subfields are numeric.
- The ‡b and ‡c must contain unique values.
- The ‡t is mandatory at this stage - meaning that in order to create a physical item out of the EOD record in the inventory, a physical shelving location code must be provided.

Managing Import Profiles

This section explains how to work with import profiles that already exist in the system. It covers:

- **Editing and Viewing Import Profiles** on page **555**
- For quick creation of a profile similar to an existing profile, **Copying Import Profiles** on page **558**
- **Deleting Import Profiles** on page **559**

VIDEO:

See *Importing Bibliographic Records and Creating Inventory* for a detailed training Webex session on importing records (49 mins). Note that you must be logged on to the Ex Libris Learning Center to access this session.

Editing and Viewing Import Profiles

PERMISSIONS:

To edit and view import profiles, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Repository Administrator
- Catalog Administrator
- General System Administrator

The Import Profile Details page enables you to edit (see page **555**) or view (see page **557**) import profiles. The tabs on this page correspond to the respective steps in the Import Profile wizard (see **Configuring New Import Profiles** on page **512**). The procedures in this section describe how to access the Import Profile Details page, which contains all of the information you entered in the steps of the profile creation wizard. Each step of the wizard has its own tab (see **Figure 425**).

To edit an import profile:

1. On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the import profile you want to edit in the list or locate it using the **Find** box at the top of the list, and then select **Actions > Edit**.

   The Import Profile Details page opens.

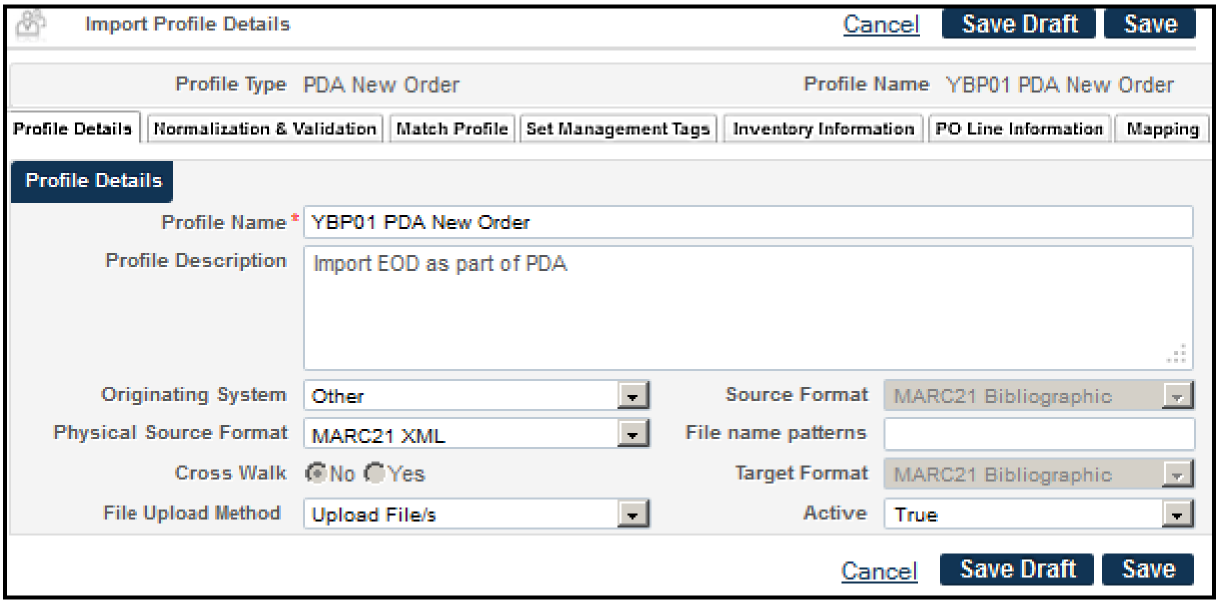


Figure 425: Edit Import Profile Details Page

The Import Profile Details page has up to seven tabs, each corresponding to a wizard step described in **Configuring New Import Profiles** on page **512**. The following table lists each of these tabs and the corresponding table in which the fields in the tab are described.

NOTE:

The Import Profile Details page includes the **Mapping** tab if you selected the **Map Library Location** or the **Fund Distribution Field** check boxes in wizard steps 6 or 7. This enables you to enter the location and fund mapping details. You can find a description of these check boxes in **Table 69** on page **536** and **Table 71** on page **543**, respectively.

Table 76. Import Profile Details Tabs

Tab Name	Reference to Field Descriptions
Profile Details	**Import Profile Details Wizard - Page 2 Fields** on page **518**
Normalization and Validation	**Import Profile Details Wizard - Page 3 Fields** on page **523**
Match Profile	**Import Profile Details Wizard - Page 4 Fields** on page **525**

Table 76. Import Profile Details Tabs

Tab Name	Reference to Field Descriptions
Set Management Tags	**Import Profile Details Wizard - Page 5 Fields** on page **528**
Inventory Information	**Import Profile Details Wizard - Page 6 Electronic Fields E-Book Mapping Section** on page **531**
PO Line Information	**Import Profile Details Wizard - Page 7 Electronic/Physical Fields** on page **543**
Mapping	If you selected the **Map Library Location** (available for physical material only) or the **Fund Distribution Field** check boxes in wizard steps 5 (physical) and 6 respectively, you must enter the field mapping in this tab. See step **3** below.

2 Edit the fields as needed, referring to the field description tables listed in **Table 76**.

3 If you selected the **Map Library Location** (available for physical material only) or the **Fund Distribution Field** check boxes described in **Table 69** on page **536** and **Table 71** on page **543** respectively, add the fund and/or location mapping as follows:

a In the **Fund Mapping** section, enter the **Source Value** of the fund and add the destination fund by clicking the **Find** button and selecting the required value.

b Click **Add** to add the line to **Fund Mapping**.

c In the **Location Mapping** section, enter the **Source Value** of the location and add the destination location by clicking the **Find** button and selecting the required value.

d Click **Add** to add the line to **Location Mapping**.

4 Click **Save Draft** or **Save** to save your changes.

To view an import profile:

1 On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**),

scroll to the import profile you want to view on the displayed list or locate it using the **Find** box at the top of the list, and then click **Actions > View**.

The Import Profile Details page opens.

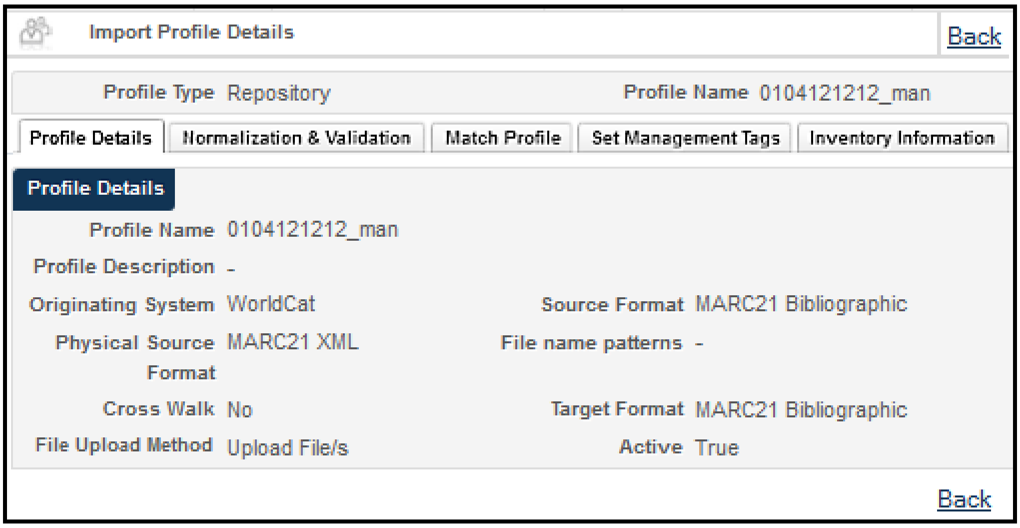


Figure 426: View Import Profile Details Page

The Import Profile Details page has up to seven tabs, each corresponding to a wizard step described in **Configuring New Import Profiles** on page **512**. **Table 76** on page **556** lists each of these tabs and the corresponding table in which the fields in the tab are described.

2 Click any of the tabs to view its contents.

3 Click **Back** to return to the Run Import page.

Copying Import Profiles

PERMISSIONS:

To copy and edit import profiles, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Repository Administrator
- Catalog Administrator
- General System Administrator

When creating a new import profile, you might save time and effort by copying an existing similar profile and modifying it (see **Editing and Viewing Import Profiles** on page 555).

To copy an import profile:

1. On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the profile you want to copy and select **Actions > Copy**.

   The Import Profile Details page opens (**Copy of an Import Profile** on page 559). Fields are populated with the values of the import profile you copied.

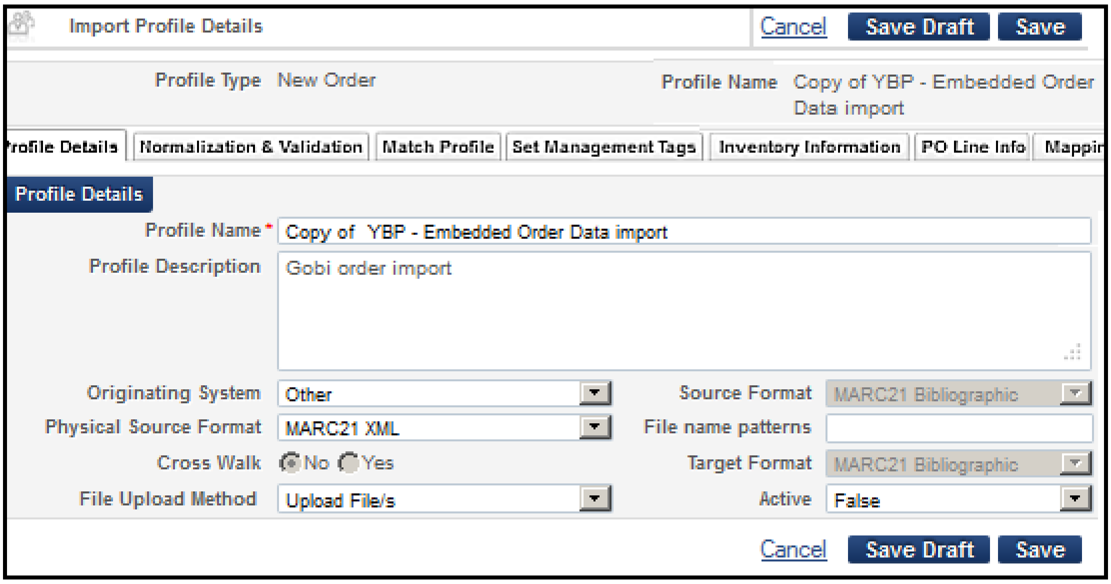


Figure 427: Copy of an Import Profile

2. In the **Profile Name** field, change the name.
3. Edit any information on the tabbed pages as described in **Editing and Viewing Import Profiles** on page 555.
4. Click **Save** or **Save Draft** to save the new profile and return to the Run Import page.

Deleting Import Profiles

PERMISSIONS:

To delete import profiles, you must have one of the following roles:

- Repository Administrator

- Catalog Administrator
- General System Administrator

You can delete import profiles that are no longer required.

To do so, on the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the profile you want to delete and select **Actions > Delete**. When the Delete Confirmation Message dialog box opens, click **Confirm**. The import profile is deleted from the Run Import page and from the system.

NOTES:

- Only inactive import profiles can be deleted.
- Once you use an import profile, it cannot be deleted because its job history remains (and cannot be deleted).

Defining Import Profiles for Multiple Item Creation

You can create multiple items in multiple libraries and locations using an import profile that defines how Alma should handle files that contain information on multiple items, libraries, and locations.

You can create multiple items in multiple libraries and locations using either one of the following types of input files, with corresponding import profiles:

- Option 1 – All subfields are part of a single data field, such as 949, which includes library and location information, and well as item information, such as barcode and item policy.
- Option 2 – Library and location subfields are part of one data field, such as 949, and item subfields are part of another data field, such as 948.

NOTE:
If library and location fields are mapped to more than one field (for example, the number of items is mapped to 950 and the location is mapped to 949), or item fields are mapped to more than one field (for example, the barcode is mapped to 949 and the item policy is mapped to 950), the import process cannot create multiple items.

Examples of Option 1

The following three examples delineate three different scenarios in which all library, location, and item subfields are part of a single data field.

The import profile is defined as follows for all three examples:

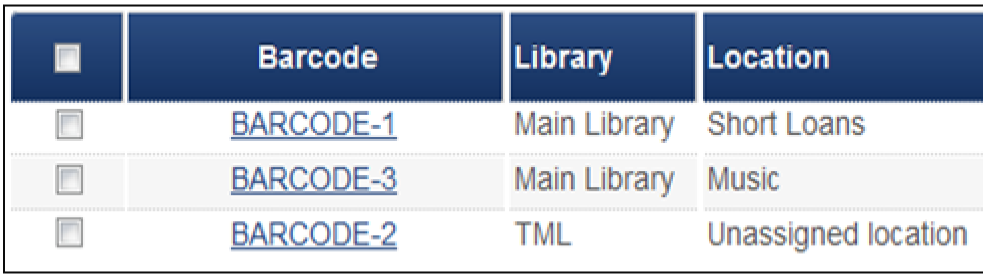
Figure 428: Import Profile – All Data Subfields Mapped to the Same Field

Example 1: Each Data Field Tag Contains Data for a Single Item

The input file is as follows:

```
=949 $bBARCODE-1$pPOLICY-1
=949 \\$mTML$tUNASSIGNED$bBARCODE-2$pPOLICY-2
=949 \\$mMAIN$tMUSIC$bBARCODE-3$pPOLICY-3
```

In this case, three items are created, each receiving its corresponding barcode and policy. The first item is created for the default library and location.



	Barcode	Library	Location
	BARCODE-1	Main Library	Short Loans
	BARCODE-3	Main Library	Music
	BARCODE-2	TML	Unassigned location

Figure 429: Items Created Upon Import – Example 1

Example 2: Locations and Related Items Are in the Same Data Field Tag

The input file is as follows:

```
=949 \\$mTML$tUNASSIGNED$bBARCODE-1$bBARCODE-2$bBARCODE-
3$pPOLICY-1
=949 \\$bBARCODE-4$bBARCODE-5$bBARCODE-6$pPOLICY-2
=949 \\$bBARCODE-7$bBARCODE-8$pPOLICY-7
=949 \\$mONL$tONL ABC$o3$bBARCODE-9$bBARCODE-10
```

In this case, the following is created:

- Three items with barcodes 1, 2, 3, and policy 1 are created at the TML/ Unassigned library/location.
- Three items with barcodes 4, 5, 6, and policy 2 are created at the default library and location.

- Two items with barcodes 7 and 8, and policy 7 are created at the default library and location.
- Three items are created at the ONL/ONL ABC library/location. Two items are created with barcodes 9 and 10, and one item is created with an automatically generated barcode.

Barcode	Library	Location
BARCODE-8	Main Library	Short Loans
BARCODE-7	Main Library	Short Loans
BARCODE-6	Main Library	Short Loans
BARCODE-5	Main Library	Short Loans
BARCODE-4	Main Library	Short Loans
6203	ONL	ONL ABC
BARCODE-10	ONL	ONL ABC
BARCODE-9	ONL	ONL ABC
BARCODE-3	TML	Unassigned location
BARCODE-2	TML	Unassigned location
BARCODE-1	TML	Unassigned location

Figure 430: Items Created Upon Import – Example 2

Example 3: No Barcodes Are Stipulated

The input file is as follows:

```
=949 \\$mTML$tUNASSIGNED$o5
=949 \\$mONL$tONL ABC
=949 \\$o3
```

In this case, the following is created:

- Five items are created at the TML/Unassigned library/location.
- Four items are created at the ONL/ONL ABC library/location. (Since the number of items is not specified, the default number is used.)
- Three items are created at the default library and location.

Barcode	Library	Location
6312	Main Library	Short Loans
6311	Main Library	Short Loans
6310	Main Library	Short Loans
6309	ONL	ONL ABC
6308	ONL	ONL ABC
6307	ONL	ONL ABC
6306	ONL	ONL ABC
6305	TML	Unassigned location
6304	TML	Unassigned location
6303	TML	Unassigned location
6302	TML	Unassigned location
6301	TML	Unassigned location

Figure 431: Figure 64 – Items Created Upon Import – Example 3

Example of Option 2

The following example delineates a scenario in which library and location subfields are part of one data field, and item subfields are part of another data field.

The import profile is defined as follows:

Figure 432: Import Profile – Library/Location and Item Subfields Mapped to Different Fields

The input file could be as follows, with a list of libraries/locations followed by a list of barcodes:

```
=949  \\$mULINC$tMUSIC$o3
=949  \\$mONL$tONL ABC
=949  \\$mTML$tUNASSIGNED$o3
=948  $bBARCODE-1$pPOLICY-1
=948  $bBARCODE-2 =948  $bBARCODE-3 =948  $bBARCODE-4 =948
$bBARCODE-5 =948  $bBARCODE-6 =948  $bBARCODE-7 =948
$bBARCODE-8
```

Alternatively, the input file could be as follows, with a combined list of libraries/locations and barcodes:

```
=949  \\$mULINC$tMUSIC$o3
=948  $bBARCODE-1$pPOLICY-1 =948  $bBARCODE-2 =948
$bBARCODE-3
=949  \\$mONL$tONL ABC
=948  $bBARCODE-4 =948  $bBARCODE-5 =948  $bBARCODE-6 =948
$bBARCODE-7
=949  \\$mTML$tUNASSIGNED$o3
=948  $bBARCODE-8
```

After importing either one of the above input files, the following is created:

- Three items with barcodes 1, 2, 3 are created at the ULINC (Main Library)/Music library/location.
- Four items with barcodes 4, 5, 6, 7 are created at the ONL/ONL ABC library/location. (Since the number of items is not specified, the default number is used.)
- Three items are created at the TML/Unassigned library/location. One item is created with barcode 8, and two items are created with automatically generated barcodes.

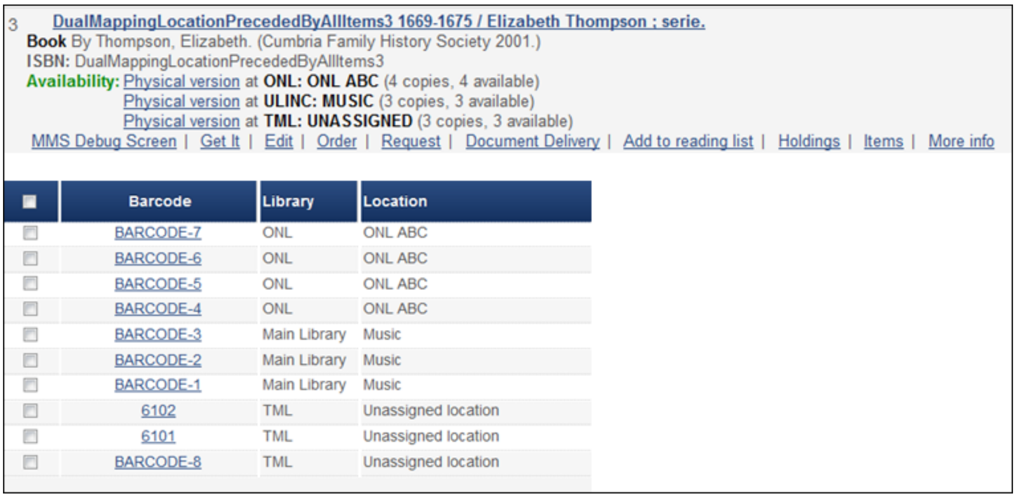


Figure 433: Items Created Upon Import – Search Results and List

Running a New Import Job

PERMISSIONS:

To run an import process, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator

You can import a new file (bibliographic, authority, or EOD) using a profile from the Run Import page. The workflow is the same whether you run the process from the Resource Management area or from Acquisitions (**Figure 434**):

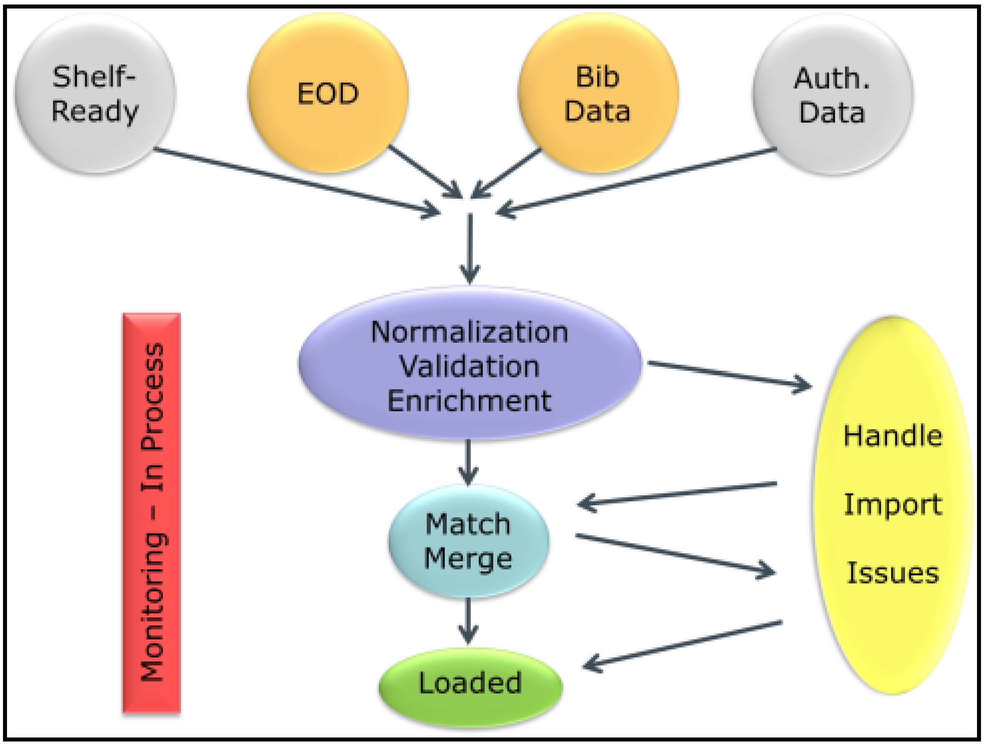


Figure 434: Import Workflow Overview

When the job has been run, you can find it on the Monitor Imports page. (For details, see on page 570, and for Acquisitions see **Monitoring Imports** on page 209.)

To resolve issues that arose during the job, see **Resolving Import Issues** on page 582.

In addition to performing a batch import for multiple bibliographic records, you can import a single bibliographic record to synchronize bibliographic records with external catalogs. For more information on the single bibliographic record import, **To import a single bibliographic record:** on page 570.

VIDEO:

See *Importing Bibliographic Records and Creating Inventory* for a detailed training Webex session on importing records (49 mins). Note that you must be logged on to the Ex Libris Learning Center to access this session.

NOTES:

Before beginning the import job, check the following:

- If none of the existing profiles is suitable for your bibliographic, authority, or EOD file, create a new profile (see **Configuring New Import Profiles** on page **512**) or copy an existing profile and modify it (see **Managing Import Profiles** on page **554**).
- Ensure that you have the correct Submission Format option selected (see **Import Profile Details Wizard - Page 2 Fields** on page **518**), and that your bibliographic, authority, or EOD import file is located in the correct place for this option. For example, if you select the **Upload File** option, your import file must be located on your computer. If you select **Server Directory**, the import file must be located on a server on your network.

To import a file with multiple records:

1. On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the import profile you want to use for the import or locate it using the **Find** box at the top of the list, and click **Actions > Run Import**.

NOTE:

If you do not have administrative privileges, you can also access the Run Import page from the Alma menu as follows: **Resource Management > Import > Start New Import**, then click **Actions > Run Impor**t. For Acquisitions users, see **Creating Purchase Order (PO) Lines** in the *Alma Acquisitions Guide*.

The Start New Import page opens.

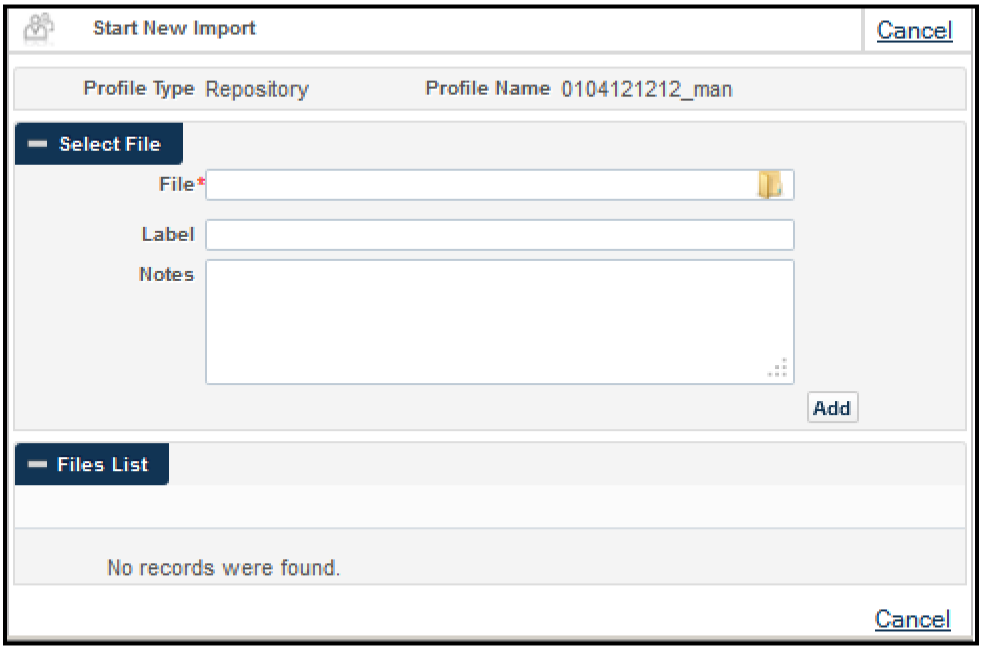


Figure 435: Start New Import Page

2 If you have **Upload File/s** selected as the File Upload Method in the Import Profile, use the browse feature of the **File** field to locate the bibliographic, authority, or EOD file you want to import. Select the file from the Windows File Upload box.

The selected file appears in the **File** field.

NOTES:

- For the files that you select to import in this manner, it is suggested that you limit your file size to a maximum of 10MB. For files imported using the **FTP** File Upload Method, this limitation does not apply (refer to the procedure **To create the import profile:** on page **518** for more information regarding the **FTP** option).
- The import process accepts ZIP files, MRC files, or XML files, but not tar.gz files.

3 To use a label for the file to help identify the contents, enter a label in the **Label** field.

4 Enter any notes for the import in the **Notes** field.

5 Click **Add**.

The page reloads with the selected file listed in the Files List section at the bottom of the page (**Figure 436**).

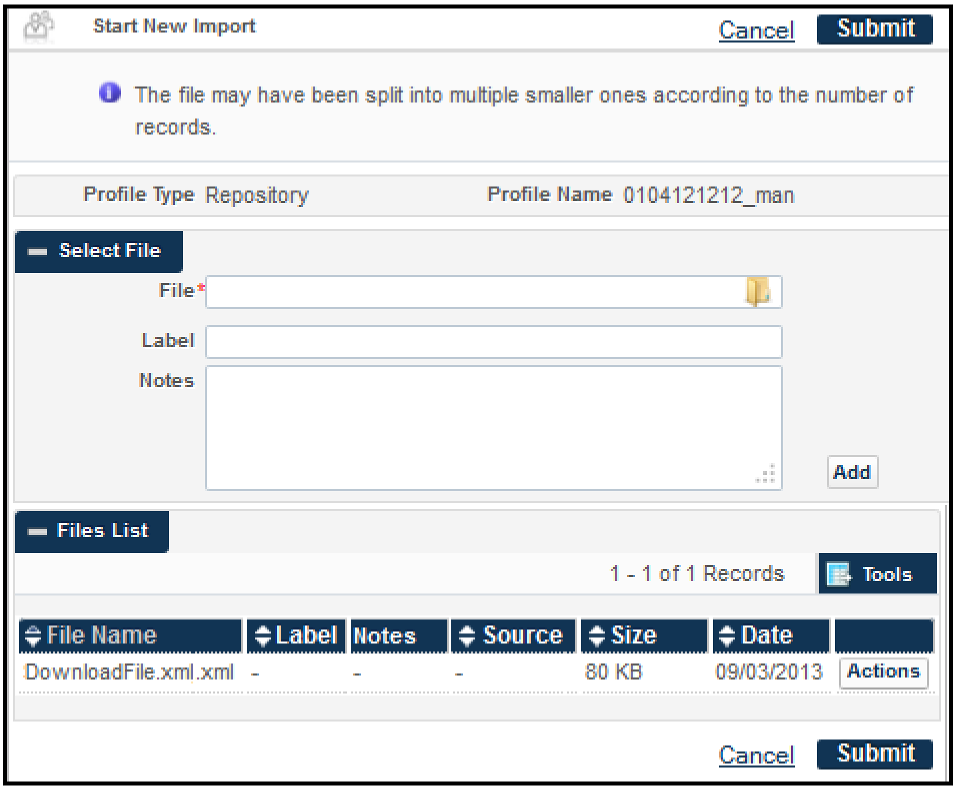


Figure 436: Start New Import - File Added

General information about the file (including a label, if you included one, the source of the file, and the size of the file) appears in this section. In addition, an **Actions** button provides options for editing the Notes field of the entry or deleting the entire entry. There is also a **Submit** button at the top and bottom of the Start New Import page.

6 Add any additional import files by repeating step 2 through step 5.

7 Click **Submit**. The Monitor and View Imports page opens, showing a message indicating the import job status. For details on monitoring import jobs, refer to **Monitoring Imports** on page **209** in the *Alma Acquisitions Guide*.

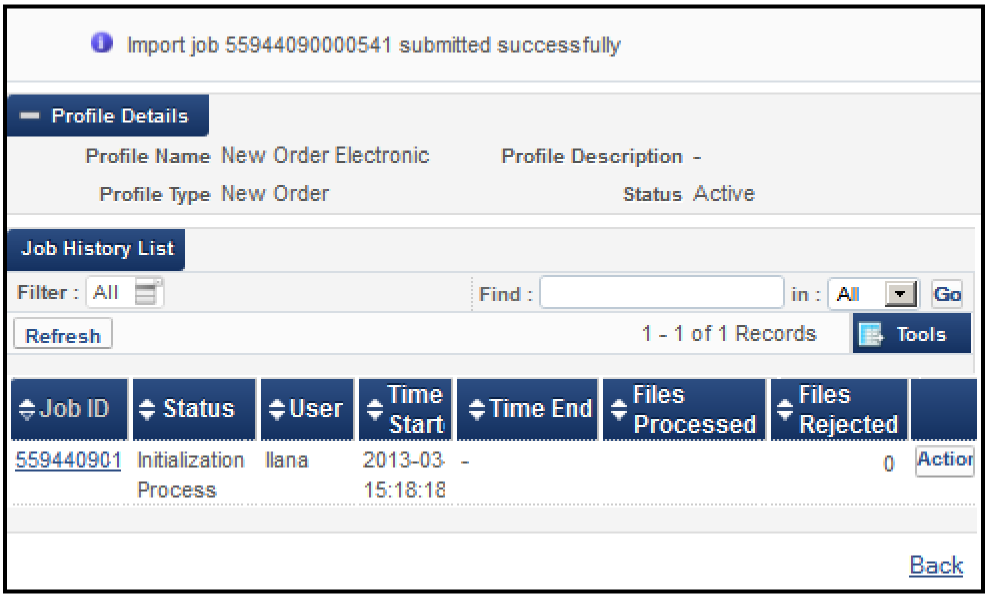


Figure 437: Monitor and View Imports Page - EOD File Loaded Successfully

8 Click **Refresh** to update the page details.

If the import finished, the status changes, as shown in the Status change from **Figure 437** to **Figure 438**.

NOTE:
Additional Status classifications are **Pending**, **In Process**, and **Completed Successfully**.

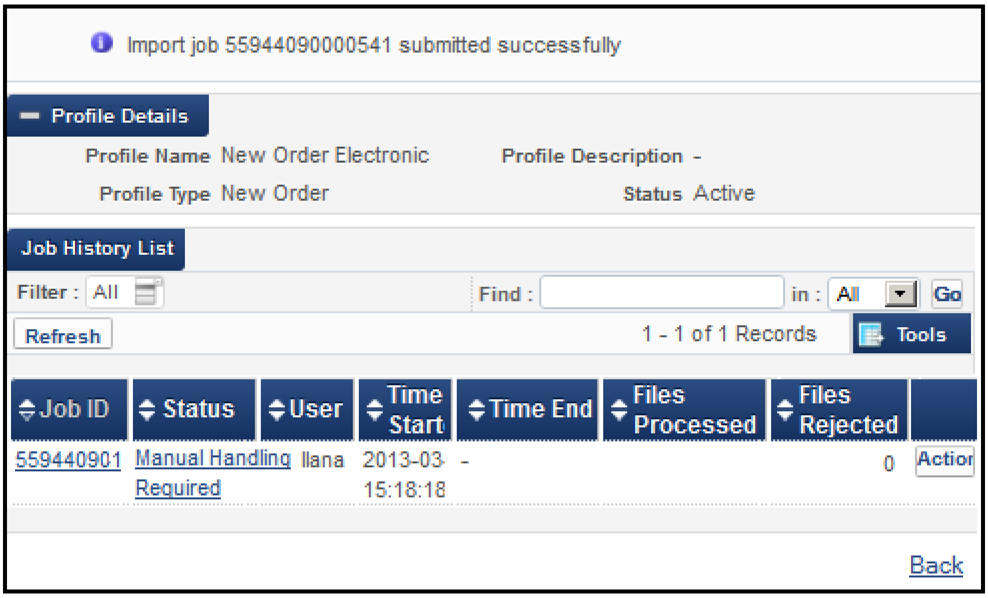


Figure 438: Monitor and View Imports Page - EOD File Import Status Refreshed

- To view reports on the status of successful imports, click the **Actions** button and select one of the four types of information.
- If you receive a status of Manual Handling Required, click the **Manual Handling Required** text link to access the page where you can resolve issues with the file.
- Click **Back** to return to the Alma home page.

To import a single bibliographic record:

1. Configure a Repository import profile.
2. In the Other Settings Configuration table (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**) click **Customize** for the `upload_single_record_from_file` parameter key.
3. In the **Parameter** field, enter the name of the import profile that you want to use when importing a single bibliographic file.
4. Select **Resource Management > Import > Upload single record from file**. The following is displayed:

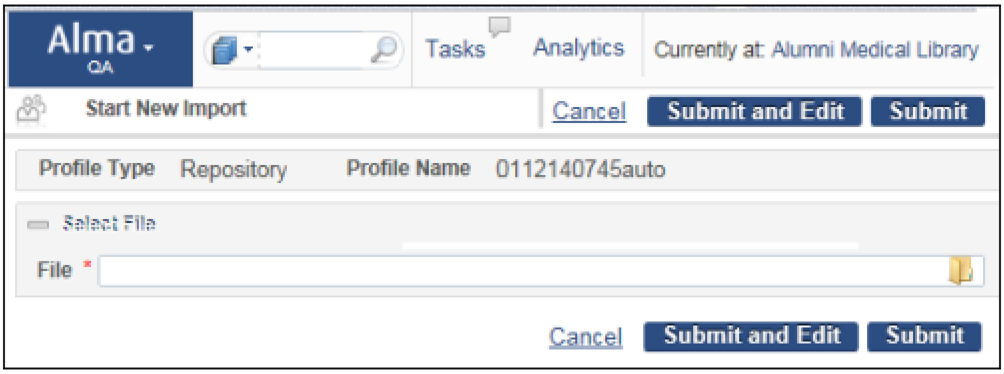


Figure 439: Start New Import

5 Select the file with the bibliographic record that you want to import.

6 Click **Submit and Edit** to open the imported record in the MD Editor. For example:

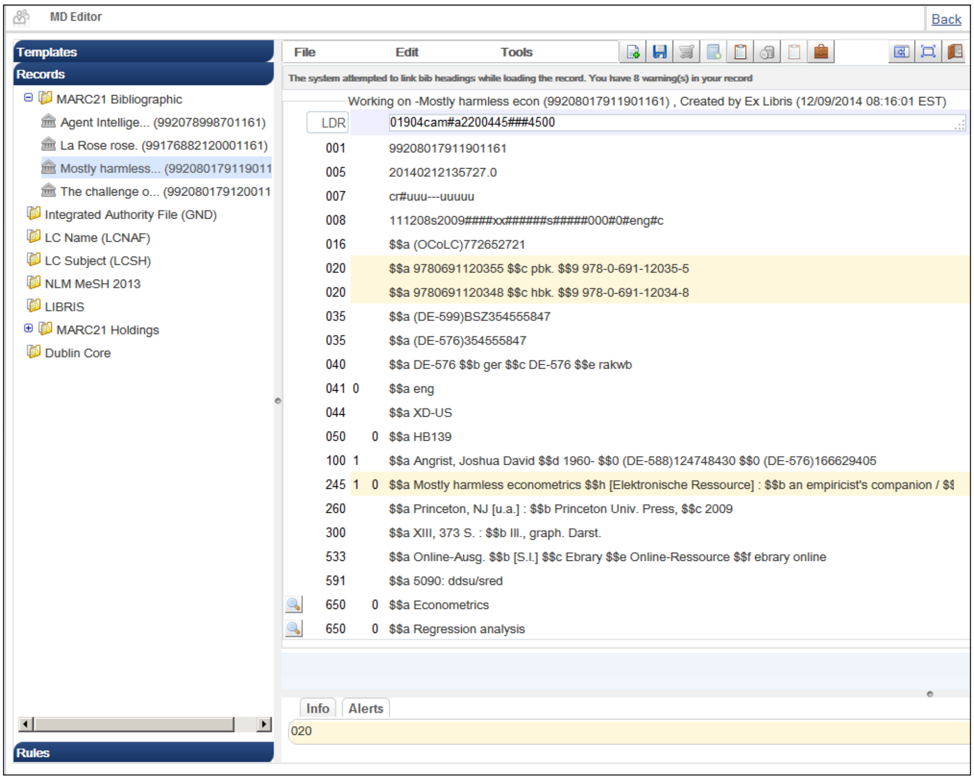


Figure 440: Submit and Edit

7 Click **Edit** to display the record in the repository. For example:

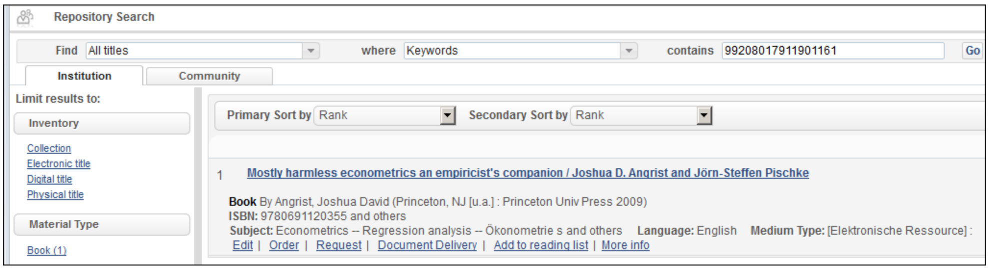


Figure 441: Submit

Viewing an Import Profile Job History

PERMISSIONS:

To view an import profile job history and related reports, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator

The Job History page lists a history of the EOD jobs that have been processed with the profile whose history you are viewing. In some cases, you can use the Job History page as a starting point for identifying problems with files and records and resolving them.

The Job History page provides basic report information about each job: status, start and stop time, and files processed and rejected.

VIDEO:

See *Importing Bibliographic Records and Creating Inventory* for a detailed training Webex session on importing records (49 mins). Note that you must be logged on to the Ex Libris Learning Center to access this session.

To view an import profile job history:

1. On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the job whose history you want to view or locate it using the **Find** box at the top of the list, and then click **Actions > Job History**.

   The Job History page opens (**Figure 442**).

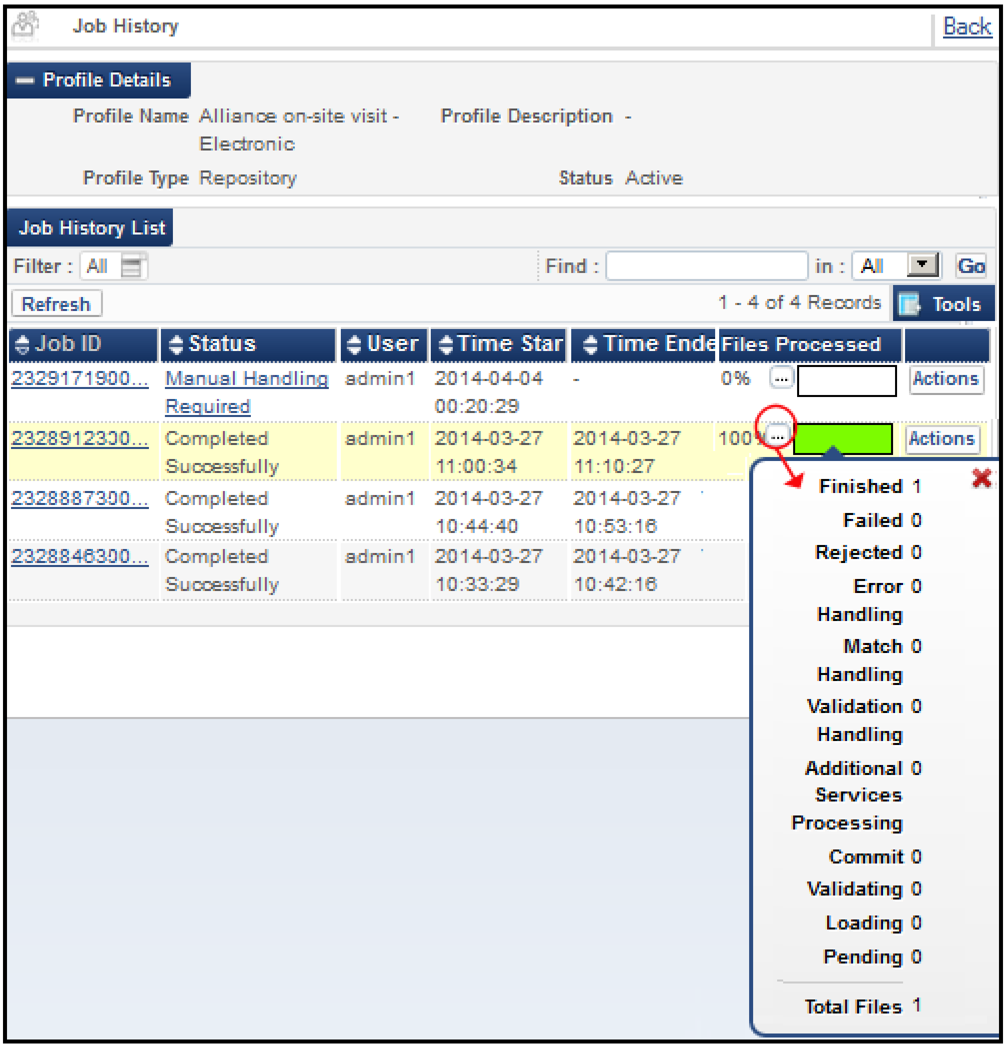


Figure 442: Job History Page

The Job History page for the job you selected lists general information for each instance of the job having been run: ID, status, user, time started and ended. It also shows a green status bar with the percent of the job complete and a button with an ellipsis (**...**) beside it. To view counts of files processed, click the ellipsis button and the information opens in a pop-up box.

2 To view specific import job details, click the **Actions** button of the job's row and select:

- **View file details** to view the file details for the selected import job (see Viewing File Details on page 574)
- **Events** to view the events report for the selected import job (see Viewing Events on page 576)

- **Imported records** to view the imported records for the selected import job (see **Viewing Imported Records** on page 577)
- **Imported PO Lines** to view the PO lines associated with the selected import job (see **Viewing PO Lines Associated With an Import Job** on page 577)
- **Report** to view a report for the selected import job (see **Viewing a Job Report** on page 579)

To download a spreadsheet of all the import jobs on the Job History page, click the **Tools** button, then select **Excel**, and follow the Windows prompts.

3 Click **Back** to return to the Run Import page.

Viewing File Details

The Import Job Details page (**Figure 443**) opens when you click the **Actions > View file details** option from the Job History page. This page lists basic imported EOD file information such as Label, Size, Number of Records, and Problem.

If there is an option for downloading a file (for editing or otherwise), the **Actions** button is available in the file's row.

NOTE:

You can download records that were not imported due to matching errors (see **Resolving Matching Issues** on page 583).

To view file details and/or download unimported records:

1 On the Job History page, click **Actions > View File Details**. The Import Job Details page opens.

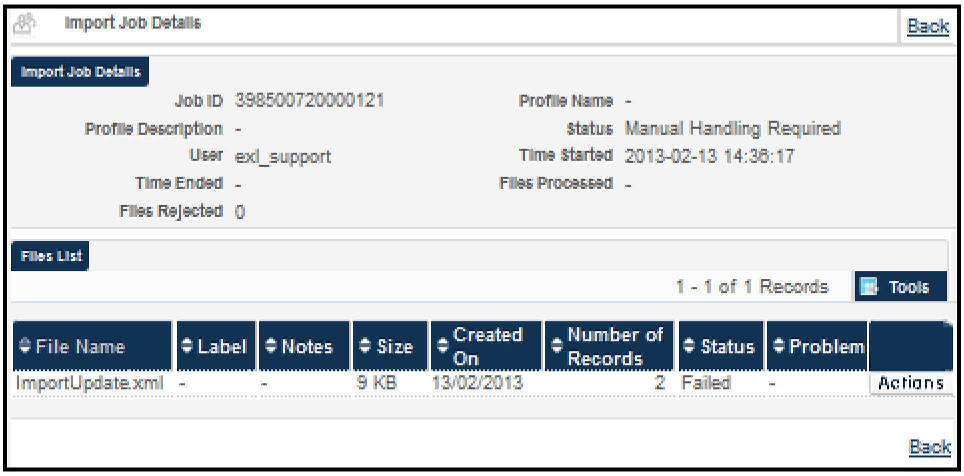


Figure 443: Import Job Details Page

2 To download a specific file, click the **Actions** button and select **Download unimported records**.

The Opening Failed Records dialog box opens.

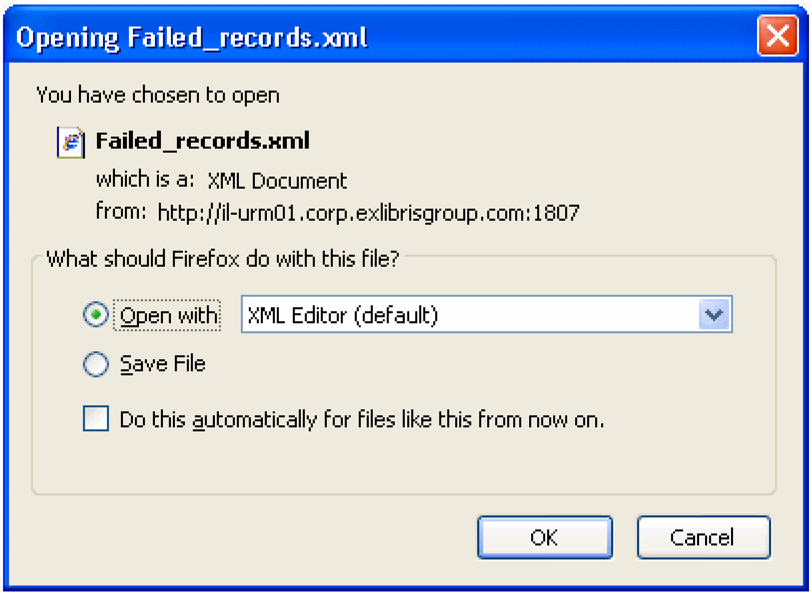


Figure 444: Opening Failed Records Dialog Box

Open the file that is created or save it in the default downloads folder on your local computer.

3 Click **OK**.

The file is opened or downloaded to your local drive.

See the following for a partial example of a file that contains an unimported record.

NOTE:
Use your PDF or browser zoom function to better view the example.

Sample Import File: XML

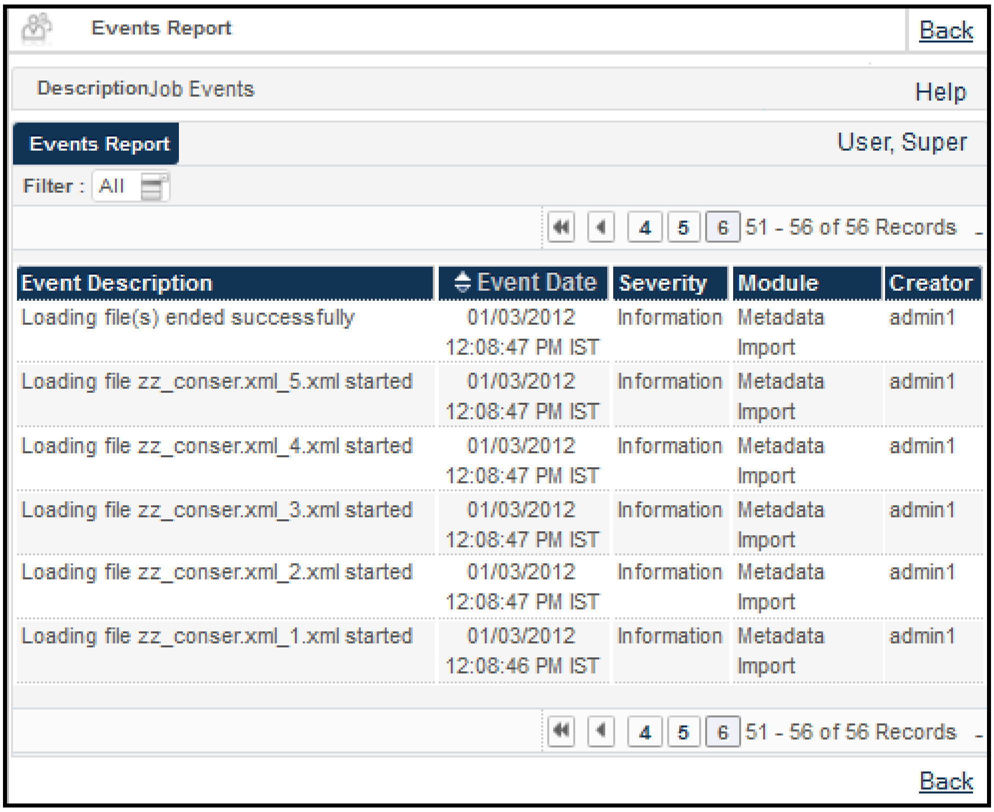

```
<?xml version="1.0" encoding="UTF-8"?>
<marc:collection xsi:schemaLocation="http://www.loc.gov/MARC21/slim
http://www.loc.gov/standards/marcxml/schema/MARC21slim.xsd"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:marc="http://www.loc.gov/MARC21/slim">
 - <marc:record>
     <marc:leader>02665cam a2200685 a 4500</marc:leader>
     <marc:controlfield tag="001">ocn788268693</marc:controlfield>
     <marc:controlfield tag="003">OCoLC</marc:controlfield>
     <marc:controlfield tag="005">20130225232921.0</marc:controlfield>
     <marc:controlfield tag="008">120419s2012 gw a c 000 0 eng c</marc:controlfield>
   - <marc:datafield tag="035" ind2=" " ind1=" ">
       <marc:subfield code="a">(OCoLC)788268693</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="035" ind2=" " ind1=" ">
       <marc:subfield code="b">99952238288</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="040" ind2=" " ind1=" ">
       <marc:subfield code="a">BTCTA</marc:subfield>
       <marc:subfield code="b">eng</marc:subfield>
       <marc:subfield code="c">BTCTA</marc:subfield>
       <marc:subfield code="d">BDX</marc:subfield>
       <marc:subfield code="d">OHX</marc:subfield>
       <marc:subfield code="d">ERASA</marc:subfield>
       <marc:subfield code="d">INU</marc:subfield>
       <marc:subfield code="d">OCLCO</marc:subfield>
       <marc:subfield code="d">COO</marc:subfield>
       <marc:subfield code="d">YDXCP</marc:subfield>
       <marc:subfield code="d">HEBIS</marc:subfield>
       <marc:subfield code="d">STF</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="020" ind2=" " ind1=" ">
       <marc:subfield code="a">9783777453118 (hd.bd.)</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="020" ind2=" " ind1=" ">
       <marc:subfield code="a">3777453110 (hd.bd.)</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="020" ind2=" " ind1=" ">
       <marc:subfield code="a">9783777453118</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="020" ind2=" " ind1=" ">
       <marc:subfield code="a">3777453110</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="020" ind2=" " ind1=" ">
       <marc:subfield code="a">9783777459011 (collector's ed.)</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="020" ind2=" " ind1=" ">
       <marc:subfield code="a">3777459011 (collector's ed.)</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="029" ind2=" " ind1="1">
       <marc:subfield code="a">HEBIS</marc:subfield>
       <marc:subfield code="b">305581805</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="029" ind2=" " ind1="1">
       <marc:subfield code="a">AU@</marc:subfield>
       <marc:subfield code="b">000050223354</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="029" ind2=" " ind1="1">
       <marc:subfield code="a">NZ1</marc:subfield>
       <marc:subfield code="b">14519036</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="100" ind2=" " ind1="1">
       <marc:subfield code="a">Katz, Benjamin,</marc:subfield>
       <marc:subfield code="d">1939-</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="245" ind2="0" ind1="1">
       <marc:subfield code="a">Benjamin Katz :</marc:subfield>
       <marc:subfield code="b">Gerhard Richter at work /</marc:subfield>
       <marc:subfield code="c">edited by Dietmar Elger, Gerhard Richter Archive ;
          [texts by Wilfried Wiegand, Paul Moorhouse, and Stephan von
          Wiese].</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="260" ind2=" " ind1=" ">
       <marc:subfield code="a">Dresden :</marc:subfield>
       <marc:subfield code="b">Staatliche Kunstsammlungen ;</marc:subfield>
       <marc:subfield code="a">Munich :</marc:subfield>
       <marc:subfield code="b">Hirmer,</marc:subfield>
       <marc:subfield code="c">2012.</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="300" ind2=" " ind1=" ">
       <marc:subfield code="a">143 p. :</marc:subfield>
       <marc:subfield code="b">photos (some col.) ;</marc:subfield>
       <marc:subfield code="c">29 cm.</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="546" ind2=" " ind1=" ">
       <marc:subfield code="a">Text in English, French and German.</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="500" ind2=" " ind1=" ">
       <marc:subfield code="a">Catalog of an exhibition held at the Kunsthalle
          Bremerhaven, February 5-March 18, 2012; Centre Pompidou, Paris, June
          3-September 24, 2012.</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="504" ind2=" " ind1=" ">
       <marc:subfield code="a">Includes bibliographical references.</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="600" ind2="0" ind1="1">
       <marc:subfield code="a">Katz, Benjamin,</marc:subfield>
       <marc:subfield code="d">1939-</marc:subfield>
       <marc:subfield code="v">Exhibitions.</marc:subfield>
     </marc:datafield>
   - <marc:datafield tag="650" ind2="0" ind1=" ">
       <marc:subfield code="a">Photography, Artistic</marc:subfield>
       <marc:subfield code="v">Exhibitions.</marc:subfield>
     </marc:datafield>

                    [Continue datafield tags]

    - <marc:datafield tag="938" ind2=" " ind1=" ">
        <marc:subfield code="a">Blackwell Book Service</marc:subfield>
        <marc:subfield code="b">BBUS</marc:subfield>
        <marc:subfield code="n">7646149</marc:subfield>
      </marc:datafield>
    - <marc:datafield tag="981" ind2=" " ind1=" ">
        <marc:subfield code="b">HIM</marc:subfield>
      </marc:datafield>
   </marc:record>
 </marc:collection>
```


4 Edit the file to correct the invalid records and then re-import the file, as described in **Running a New Import Job** on page **565**.

Viewing Events

You can view the events that were generated while the EOD file was being imported using a specific profile.

To do so, on the Job History page, click **Actions > Events.**



Event Description	Event Date	Severity	Module	Creator
Loading file(s) ended successfully	01/03/2012 12:08:47 PM IST	Information	Metadata Import	admin1
Loading file zz_conser.xml_5.xml started	01/03/2012 12:08:47 PM IST	Information	Metadata Import	admin1
Loading file zz_conser.xml_4.xml started	01/03/2012 12:08:47 PM IST	Information	Metadata Import	admin1
Loading file zz_conser.xml_3.xml started	01/03/2012 12:08:47 PM IST	Information	Metadata Import	admin1
Loading file zz_conser.xml_2.xml started	01/03/2012 12:08:47 PM IST	Information	Metadata Import	admin1
Loading file zz_conser.xml_1.xml started	01/03/2012 12:08:46 PM IST	Information	Metadata Import	admin1

Figure 445: Events Report Page

The Events Report page displays events such as a job starting and stopping. The page lists dates, type or severity of events, and which part of the system an event occurred in.

To return to the Job History page, click the **Back** link.

Viewing Imported Records

You can view the records that were imported using the profile from which you viewed the job history.

The imported records are viewed on the Repository Search page (see **Using the Alma Repository Search** on page 18). From the Job History page, you can view them by clicking **Actions > Imported Records**. Use the **Back** link to return to the Job History page.

Viewing PO Lines Associated With an Import Job

You can view the PO lines associated with an import job and create a set of PO lines upon importing an EOD. You create a PO line set to perform global updates on the imported PO lines, such as changing status, updating PO line information, and so forth.

PO Lines can be changed globally via the relevant PO line process (see Configuring Processes on page 700).

To create a PO line set from an imported EOD:

1. On the Job History page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**, filter the results by **New Order** profiles and select **Actions > Job History** for an entry), select **Actions > Imported PO Lines**. The Search for PO Line page opens and displays the PO lines associated with the job.

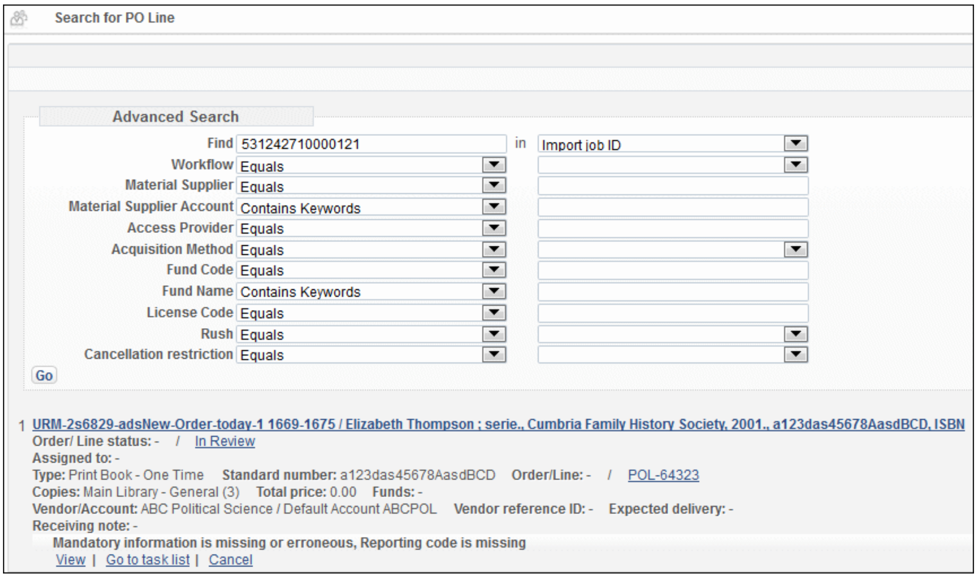


Figure 446: Search for PO Line Page

2. Click **Save**. The Set Details page opens.

Figure 447: Set Details Page

3. In the **Set name** field, enter a name for the set.
4. Modify any other parameters, as necessary.
5. Click **Save**.

Viewing a Job Report

The Job Report page provides summary information for an import job listed on the Job History page. When you select **Actions > Report** in the row of an import job, the Job Report page displays counts for such items as

- records processed, imported, and deleted
- PO lines processed and imported
- physical items and electronic portfolios processed and imported

The report includes information organized into collapsible headings.

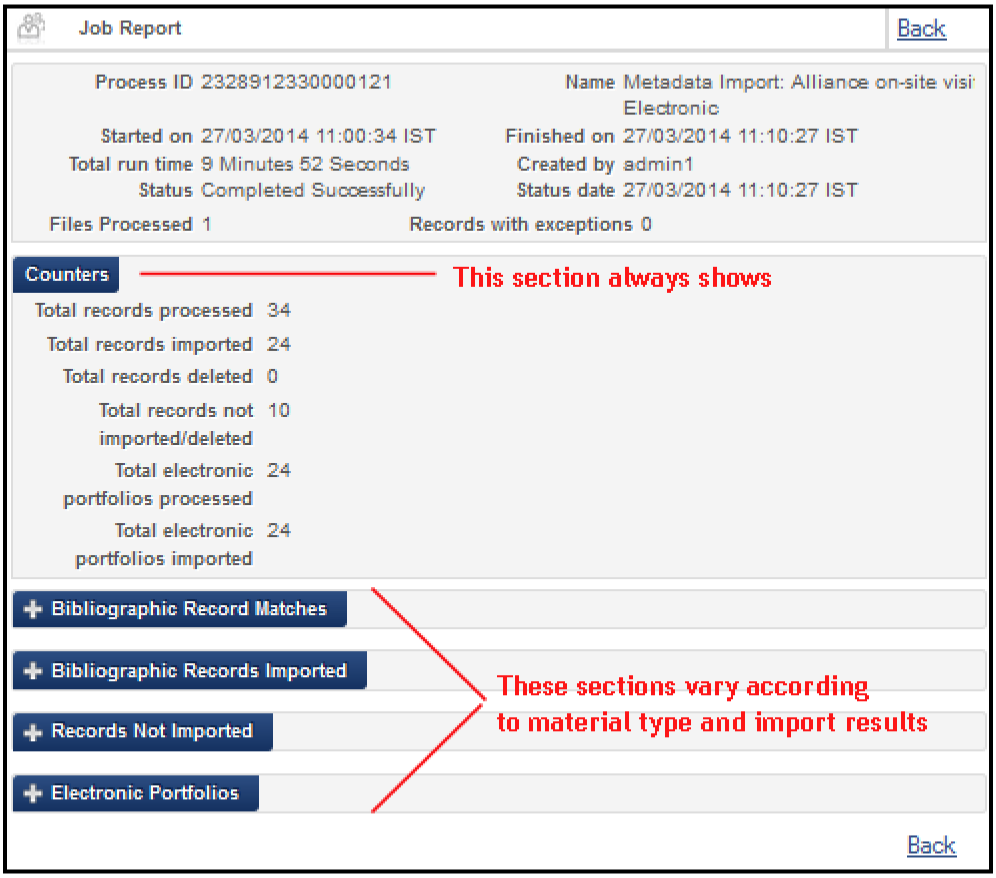


Figure 448: New Job Report Format and Content

In addition, you can view bibliographic records related to a result, create an itemized set for one row of results, or download sources as XML or binary files.

To preview records, create a set from the results, or download the results as XML or binary files, find the row containing the records you want to work on and click the **Actions** button. (Then see the procedures below.)

To preview the records from a row of the results:

1 Select **Actions > Preview records** for the row containing the information you want to preview.

Alma returns a list of bibliographic records to which the row refers. (See figure below.)

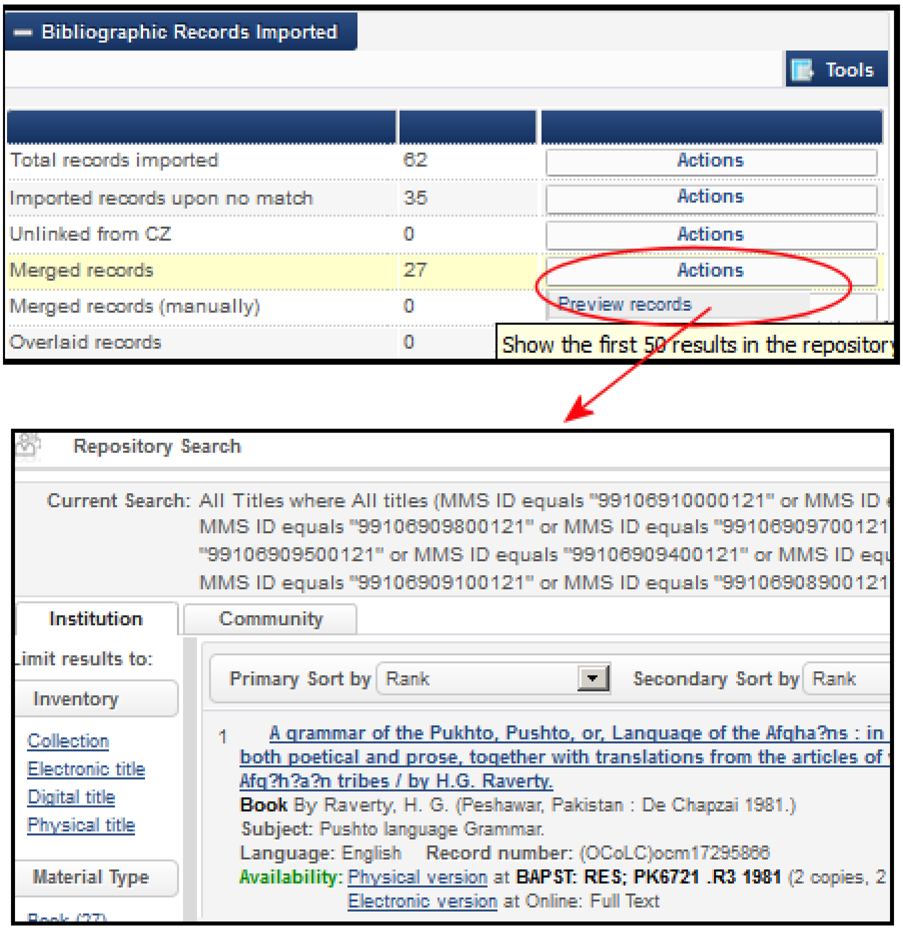


Figure 449: Actions > Preview Merged Records on Repository Search Page

2 From the Repository Search page, perform any actions available to the item and to your role.

To create a set of records from an import job report:

1 From the new report, find the line containing the items you want to include in the set. (For example, merged records in **Figure 449**.)

2 Select **Actions > Create itemized title set**.

The Set Details page opens. The default name for the set appends the date and time to the name of the job (see figure below).

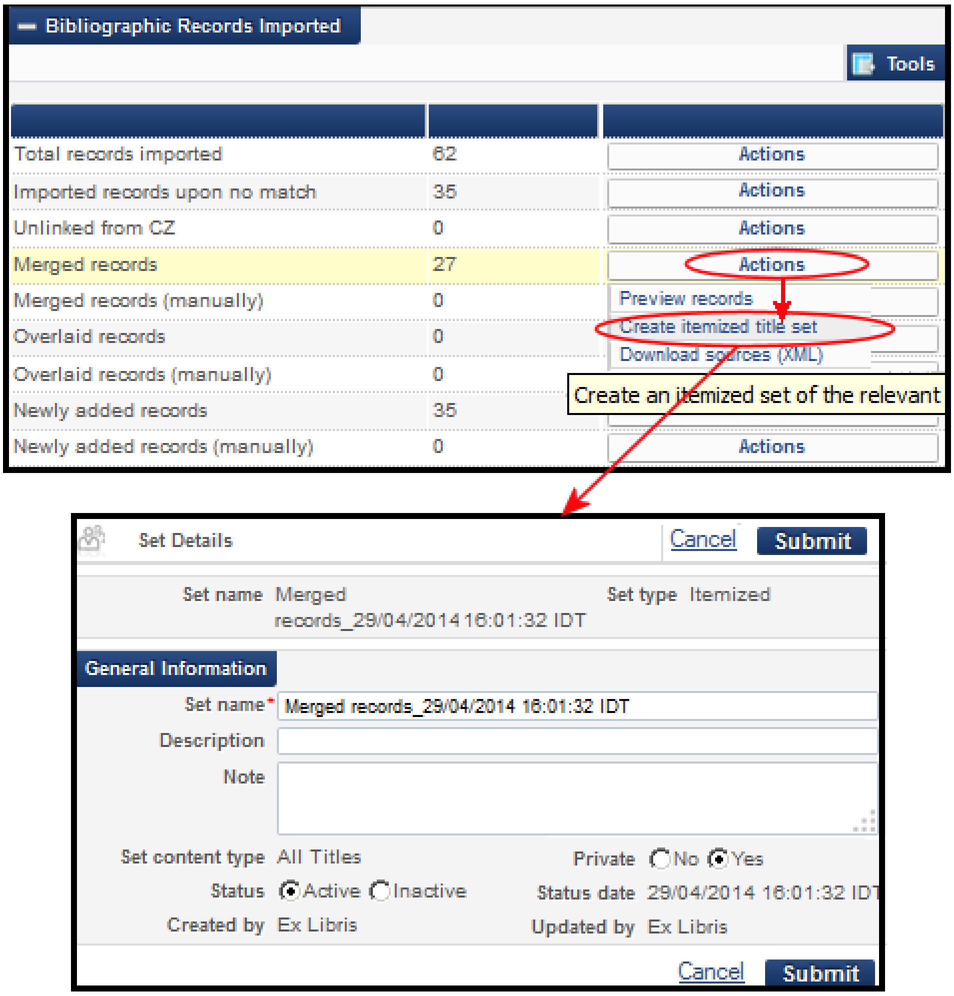


Figure 450: Create Itemized Title Set From Report

3 Complete the fields as you would for any itemized set (see **Adding Itemized Sets** on page **84**), then click the **Submit** button.

4 Click through the confirmation box for the new set.

The confirmation box closes and Alma returns you to the Report page, where a message informs you that the job was submitted. The set is created in Alma and can be used immediately.

To download an XML or binary file:

From the report page, select **Actions > Download sources (XML)** or **Actions > Download sources (binary)** for the row containing the source file you want to view and/or edit. The source downloads as a compressed file. To view or edit, unzip the file and open it in an XML or plain text editor or the program you use to work with binary files.

Resolving Import Issues

PERMISSIONS:

To resolve issues related to an import job, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator

The following types of import issues can arise during the import process:

- **Matching** – Indicates that the imported record matches an already existing record in the database. When this occurs, the issue is resolved according to the match profile configured during import profile creation (see **Import Profile Details Wizard - Page 4 Fields** on page 525).

  For details on resolving matching records, see **Resolving Matching Issues** on page 583.

- **Validation** – During the import process, the imported records are checked according to the validation task chain selected during import profile creation (see **Import Profile Details Wizard - Page 3 Fields** on page 523). If the check determines that an issue exists as an Error and not as a Warning, the file is sent to the Validation subpage of the Resolve Import Issues page. Whether the issue is an Error or a Warning is determined according to the severity profile chosen during profile creation. For information on configuring validation exception (severity) profiles, see **Working with Validation Exception Profiles** on page **652**.

It is not possible to fix records that cannot be validated. You can either force the import of the record or discard it. You also can force the import of the entire file or abort the import.

For details on resolving validation issues, see **Resolving Validation Issues** on page **589**.

- **Errors** – Indicates that something unexpected has happened which cannot be resolved. These errors include any problems with file data not related to matching or validation of records. The Errors subpage of the Resolve Import Issues page displays only the files with these issues.

  For details on viewing error records, see **Viewing Import Errors** on page **595**.

Resolving Matching Issues

A matching discrepancy occurs when the imported record matches an already existing record in the database. When this occurs, the issue is resolved according to the **Match profile** handling method configured when the import profile was created (see **Import Profile Details Wizard - Page 4 Fields** on page **525**). The following handling options are available on the Import Profile Details page:

- **Manual** – The file is sent to the Matching subpage of the Resolve Import Issues page, where you resolve the problem by selecting the Job ID link, viewing the record, and choosing to import, merge, or overlay the record. For details, see **Editing Matching Records** on page **587**.
- **Automatic** – The matching record is processed automatically, according to the Match Action options chosen when defining the import profile (see the **Import Profile Details Wizard - Page 4 Fields** on page **525**).

  If either **Merge** or **Overlay** was defined and there are multiple record matches, the process reverts to manual operation where you manually choose which matching record to merge/overlay.

To resolve matching issues:

1. On the Resolve Import Issues page (**Acquisitions > Import > Resolve Import Issues** or **Resource Management > Import > Resolve Import Issues**), select **Matching** from the left margin and scroll to the import job you want to view, or locate it using the **Find** box.

NOTE:
You can also access the Resolve Import Issues page by clicking the **Manual Handling Required** link in the Status column on the Monitor and View Imports page.

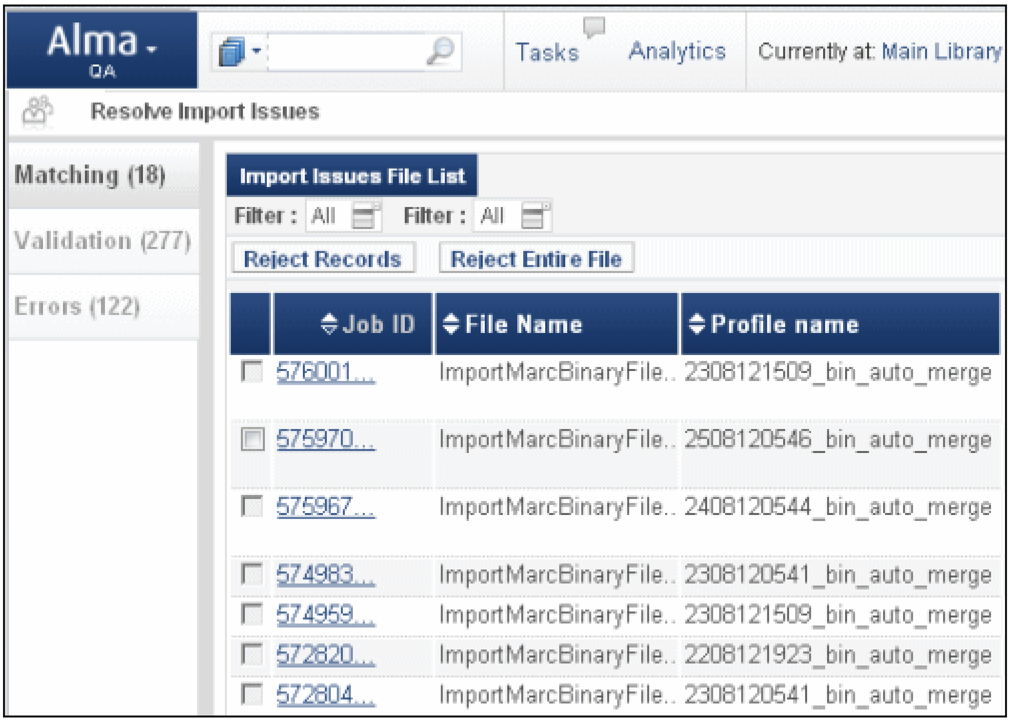


Figure 451: Resolve Import Issues Page – Matching Errors

2 Click the **Actions** button for the relevant job and select:

- **View records** (Viewing Matching Import File Records on page 585)
- **Edit** (Editing Matching Records on page 587)
- **Release assignment** (Releasing Assignments on page 589)
- **Do Not Import** – Discards the records with matching errors, while importing the valid records in the file.
- **Reject File** – Discards the file containing records with matching errors. The file is removed from the Handle Import Validation Errors page.

NOTES:

- The **Actions** options that are displayed depend on the user’s role.
- If the import file is unassigned, the **Release assignment** option is not displayed.

3 To perform multiple Do Not Import and Reject File actions on imported file records, select the issues on which you want to perform the Do Not Import and Reject File actions, and click the **Reject Records** or **Reject Entire File** buttons.

Viewing Matching Import File Records

You can view the records within the import file that match existing Alma records. You can then determine whether you want to import these matching records.

On the Handle Matching page, you can filter the list of results by handling type using the **Filter** drop-down list. Choose from the following options:

- **Manual** – Indicates that manual handling for matches was configured during import profile configuration (see **Configuring New Import Profiles** on page **512**)
- **Multiple Matches Delete** – Indicates that the delete failed due to matching records
- **Multiple Matches EOD** – Indicates that the EOD import failed due to matching records
- **Multiple Matches Merge** – Indicates that the merge failed due to matching records
- **Multiple Matches Overlay** – Indicates that the overlay failed due to matching records

The matching import profile records are displayed on the Handle Matching page (choose **Import > Resolve Import Issues** from the Acquisitions or Resource Management menu, select **Matching** from the left margin and **Actions > View records** or click the job ID link for the relevant import job).

The Handle Matching page displays the following columns in the Imported Records to Handle section:

- Row number
- Record ID
- Author
- Short Title
- Publisher
- Date
- Handling Type – Indicates the handling option for matches selected during import profile configuration (see **Import Profile Details Wizard - Page 4 Fields** on page **525**). The possible values are indicated in the **Filter** options described above.
- Action / View Matches

To view matching records:

On the Handle Matching page (select **Actions > View records** or click the job ID link for the relevant import job on the Resolve Import Issues page), click the record ID link or **View Matches** for the record whose matches you want to handle.

- If there is only one record that matches, the Side-By-Side Matching page opens:

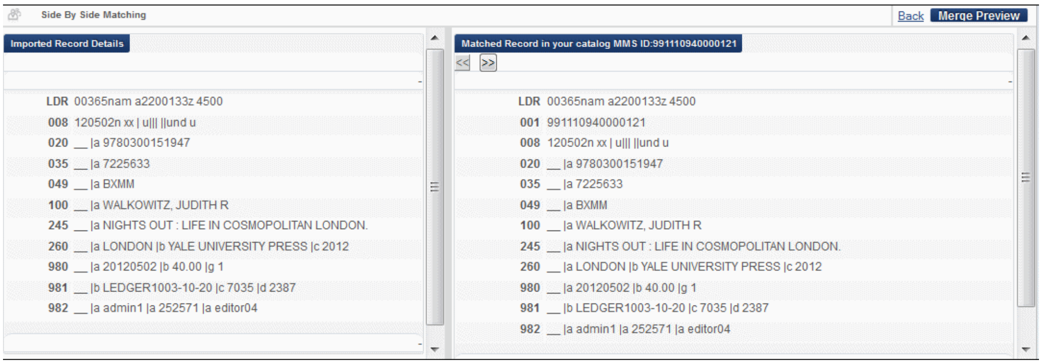


Figure 452: Side By Side Matching Page

The Side-By-Side Matching page displays the Imported Record Details on the left side of the page and the Matched Record on the right side of the page.

- If there is more than one record that matches, the Import Record Matches page opens.

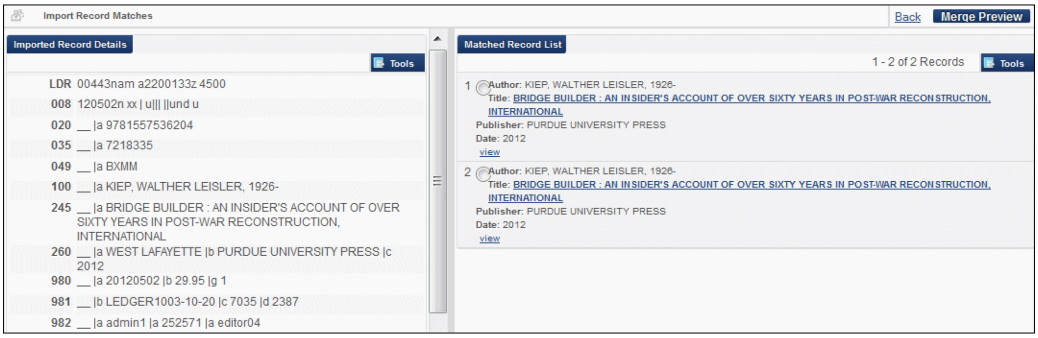


Figure 453: Import Record Matches Page

The Import Record Matches page displays the Imported Record Details (on the left side of the page) and the Matched Records in your catalog (on the right side of the page).

In the Matched Records List section, select the record that you want to match with the new record.

To preview how the record would look following an import, select a record in the Matched Record List and click **Merge Preview**.

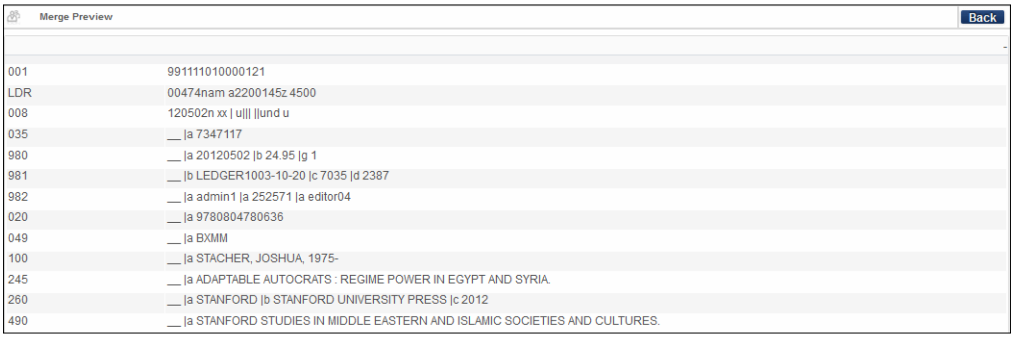


Figure 454: Merged Preview Page

Editing Matching Records

You use the **Edit** option to view the record details and errors, and perform an import of the record as needed.

To edit matching records:

1 On the Handle Matching page (select **Actions > Edit** or click the job ID link for the relevant import file on the Resolve Import Issues page), click the record ID link or **View Matches** for the relevant import file.

- If there is only one record that matches, the Side-By-Side Matching page opens:

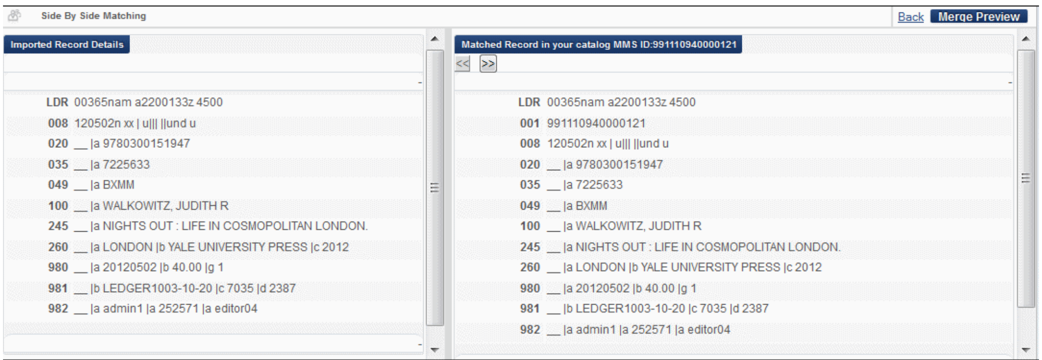


Figure 455: Side By Side Matching Page

The Side-By-Side Matching page displays the Imported Record Details on the left side of the page and the Matched Record on the right side of the page.

- If there is more than one record that matches, the Import Record Matches page opens.

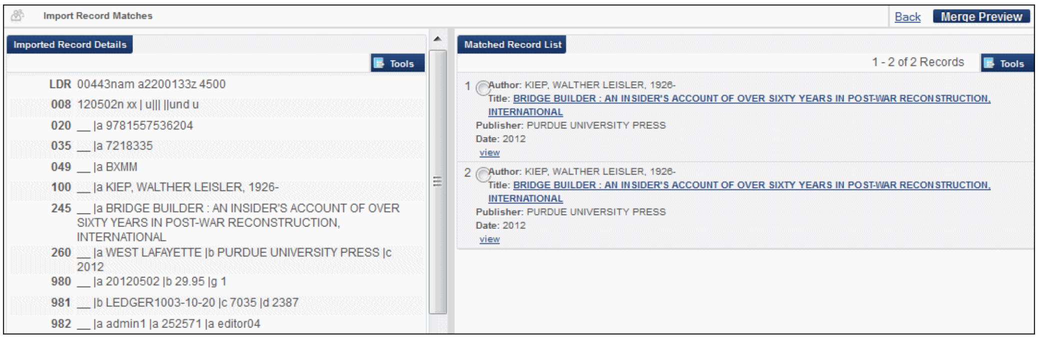


Figure 456: Import Record Matches Page

In the Matched Records List section, select the record that you want to match with the new record.

2 Click **Merge Preview** to view the matched record in a merged view.

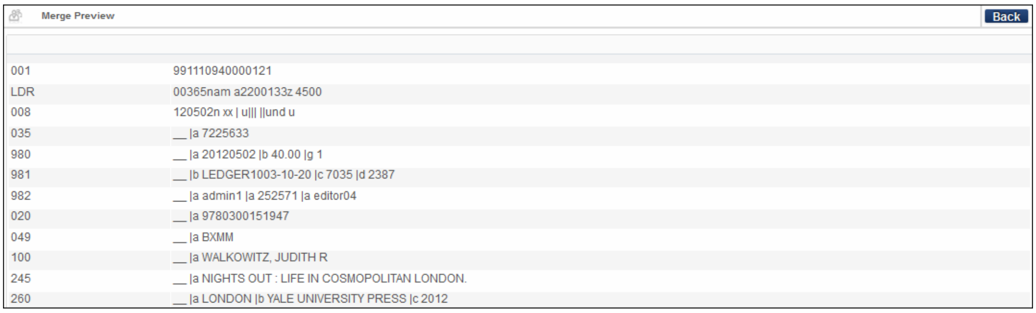


Figure 457: Merged Preview Page

Click **Back** to return to the Side-By-Side Matching page or Import Record Matches page.

NOTE:

You can click **Approve Import** on the Handle Matching page to approve the import without viewing the records. The record is imported, but it may be a duplicate of an existing record. For information on monitoring imports, see **Monitoring Imports** on page **209**.

3 Select an option from the drop-down list for the record and click **Execute**. The available options are:

- **Import** – The record is imported, but may be a duplicate of an existing record
- **Do Not Import** – The new record is discarded
- **Merge** – Merges the records according to the options chosen in the profile configuration. For details on configuring import profiles, see

Configuring New Import Profiles on page **512**. Note that if this option cannot be performed, as in the case of importing records marked for deletion, it is unavailable.

- **Overlay** – Keeps the old record only, but changes its internal data according to the new record

NOTE:
The **Overlay** option enables the history of all the linking already performed for this record to be kept.

If the record is imported, details of the import can be viewed on the Monitor and View Imports page.

Releasing Assignments

Import jobs are initially assigned to the user who creates and runs the job. The Assigned To column on the Resolve Import Issues page lists the user assigned to each job. If no user is assigned to a particular job, the column is empty for the job and the **Release assignment** option under **Actions** is not displayed.

Assigning a job to a user avoids duplicate work on the same job. Only the user to whom the job is assigned can work on it. Therefore, if you are unable to work on a job assigned to you; and you want to release the job so that other users can work on it, you must select **Actions > Release Assignment** for that job (relevant import file) on the Resolve Import Issues page. The import job is unassigned, and a dash (–) displays in the **Assigned To** column for the selected job. Any user can work on an unassigned job, and Alma then automatically assigns it to that user.

Resolving Validation Issues

Imported records are validated according to the validation task chain defined in the import profile (see **Configuring New Import Profiles** on page **512**).

For jobs/records with validation issues, you can:

- Force the import
- Choose not to import
- Reject the file
- Create an XML file of the failed records

To resolve validation issues:

1 On the Resolve Import Issues page (**Acquisitions > Import > Resolve Import Issues** or **Resource Management > Import > Resolve Import Issues**), select **Validation** from the left margin. The Resolve Import Validation Errors page opens.

NOTE:
You can also access the Resolve Import Validation Errors page by clicking the **Manual Handling Required** link in the Status column on the Monitor and View Imports page.

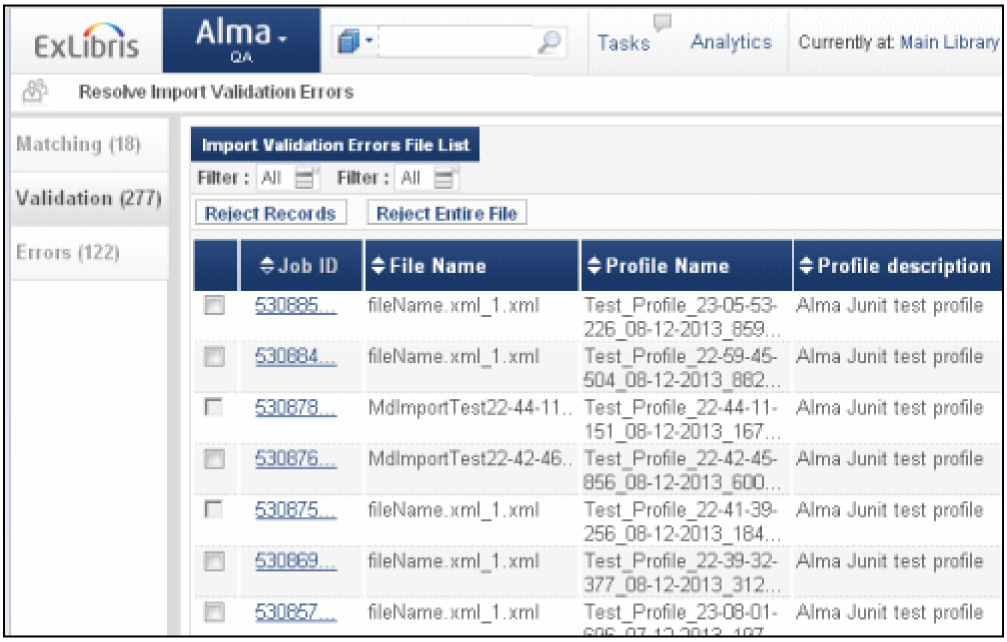


Figure 458: Resolve Import Validation Errors Page

2 Locate the import job with which you want to work using **Find** or one of the following primary filters and selecting **All** or **Assigned to Me** from the secondary filter:

- Authority
- Initial Authority
- Remote Digital
- Repository

3 Select one of the following row actions (using the **Actions** button) or check box actions (for one or multiple rows):

- Row action options:
  - **View records** (Viewing Import File Records With Validation Errors on page 591)
  - **Edit** (Editing Records With Validation Errors on page 594)
  - **Release assignment** (Releasing Assignments on page 589)

NOTE:
The **Release Assignment** option is only available as a row action for import files/jobs that have an assigned user ID displayed in the **Assigned To** column.

- **Do Not Import** – Discards the records with validation errors, while importing the valid records in the file.
- **Reject File** – Discards the file containing records with validation errors. The file is removed from the Handle Import Validation Errors page.

NOTE:
The **Actions** button is only available for import jobs assigned to you or unassigned import jobs. The **View** button displays for import jobs assigned to another user ID.

- Check box action options (to perform multiple **Do Not Import** and **Reject File** actions):
  - **Reject Records** button
  - **Reject Entire File** button

Viewing Import File Records With Validation Errors

You can view the records within the import file that match existing Alma records. You can then determine how you want to handle the records with validation errors.

To view validation errors:

1 On the Resolve Import Validation Errors page, select **Actions > View records** for the relevant import file. The Handle Import Validation Errors page opens.

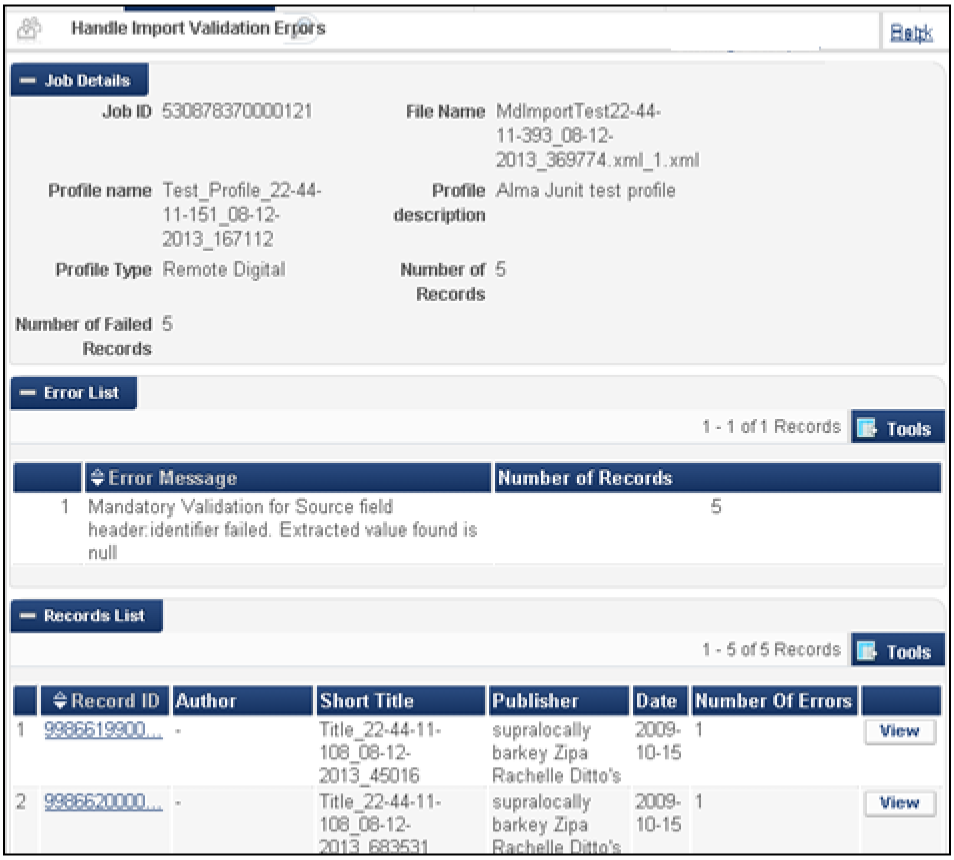


Figure 459: Handle Import Validation Errors Page

The Handle Import Validation Errors page includes the following sections:

- **Job Details** – Provides details of the import job file.
- **Error List** – Displays the following columns:
  - Error Message – Describes the error that caused the validation to fail.
  - Number of Records – The number of records that have an error.
- **Records List** – Describes the record details in the following columns:
  - Record ID
  - Author
  - Short Title

- Publisher
- Date
- Number of Errors

2 Click **View Errors**. The Imported Record Details page opens.

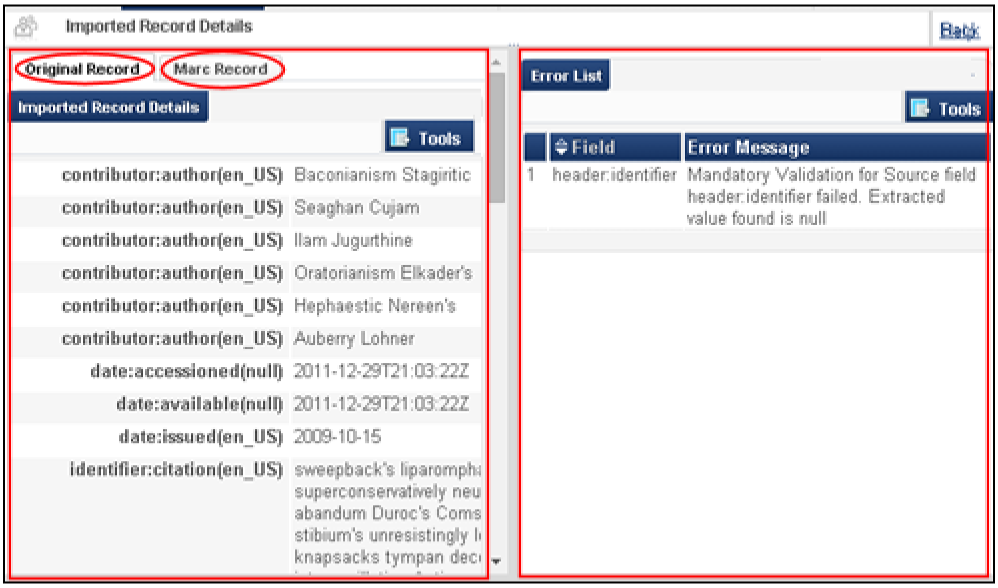


Figure 460: Imported Record Details Page

The left side of this page displays the record details in the following formats:

- Original record format
- MARC record format

Select the appropriate tab to display the view you prefer to see.

The right side of the page displays the error information. The Error List section on this page displays the same error information as displayed in the Error List section on the Handle Import Validation Errors page.

3 Using the **Tools** button, you can export the following information to an Excel file or click **Back** to return to the Handle Import Validation Errors page:

- Original record content
- MARC record content

- Error List section content

The content that is generated for export to Excel is determined by which **Tools** button you click (on the left side of the display or the right side of the display) and, for the left side of the display, which tab is open.

With the exported record content, you can make corrections and, subsequently, use the corrected content to import to Alma.

Editing Records With Validation Errors

The **Edit** option enables you to view the record details and validation errors and provides several options for managing the records/files with these errors.

To edit a record:

1. On the Resolve Import Validation Errors page, select **Actions > Edit** or click the link in the **Job ID** column for the relevant import file. The Handle Import Validation Errors page opens.

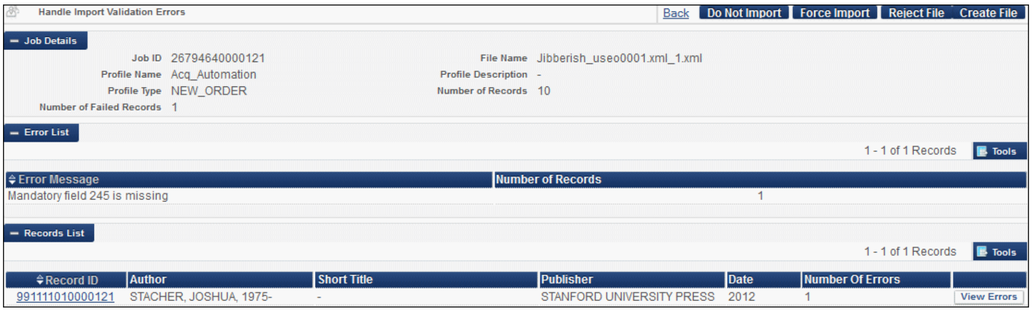


Figure 461: Handle Import Validation Errors Page

2. Choose one of the following page or row actions:
   - Page actions:
     - **Do Not Import** – Discards the records with validation errors while importing the valid records in the file.
     - **Force Import** – Imports all the records including those with errors.
     - **Reject File** – Discards the file containing records with validation errors. The file is removed from the Handle Import Validation Errors page.
     - **Create File** – Enables saving the record details to an external XML file in which you can edit the records. You can then re-import the file.
   - Row action:

- **View Errors** – Refer to step 2 and step 3 in the procedure **To view validation errors:** on page 592 for a description of the Imported Record Details page that displays.

Viewing Import Errors

The Resolve Import Errors page lists the import jobs with unexpected errors that occurred during the import process. These errors include any problems with file data not related to matching or the validation of records. Refer to the Monitor and View Imports page and **Monitoring Imports** on page 209 in the *Alma Acquisitions Guide* for more details.

To view import errors:

1 On the Resolve Import Issues page (**Acquisitions > Import > Resolve Import Issues** or **Resource Management > Import > Resolve Import Issues**), click **Errors**. The Resolve Import Errors page opens.

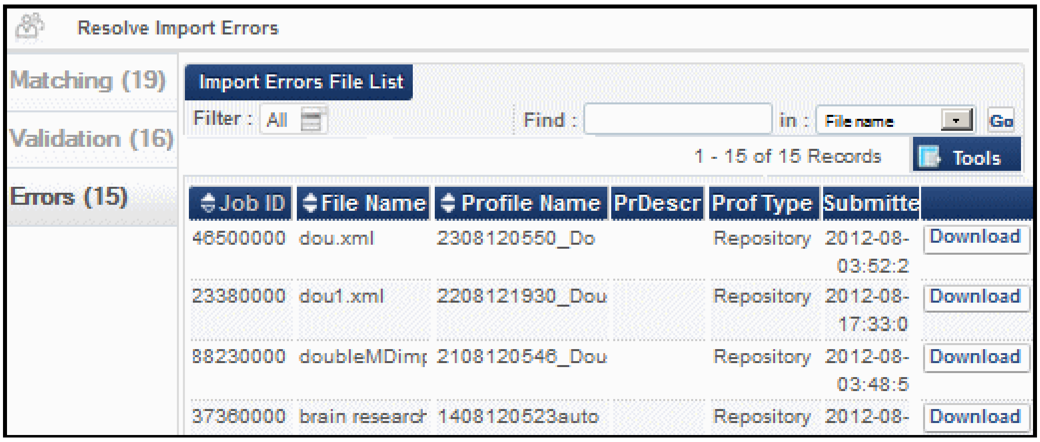


Figure 462: Resolve Import Errors Page

2 Click **Download** to download an XML or a binary file (depending on the format defined in the import profile) listing the records that did not import properly. For example:

```
  <?xml version="1.0" encoding="UTF-8"?>
- <collection xmlns="http://www.loc.gov/MARC21/slim">
  - <record xmlns="http://www.loc.gov/MARC21/slim">
      <leader>00096nam a2200049 i 4500</leader>
      <controlfield tag="003">EXL</controlfield>
    - <datafield tag="245" ind2="0" ind1="0">
        <subfield code="a">bibliographic record
          sample</subfield>
      </datafield>
    - <datafield tag="020" ind2="0" ind1="0">
        <subfield code="a">1234567890</subfield>
      </datafield>
    - <datafield tag="022" ind2="0" ind1="0">
        <subfield code="a">1234567890</subfield>
      </datafield>
    </record>
  </collection>
```


Figure 463: Error(s) in downloaded XML

3 Correct any errors you detect and run the import process again.

Job History Information and Solutions

In order to gather more detailed information about errors and how to correct them, you can view jobs and their errors through the Configuration Menu of the Acquisitions or Resource Management menu on Alma.

To handle errors and issues after running an import:

1. From the Run Import page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders section > Import Profiles** or **Resource Management > Resource Configuration > Configuration Menu > Record Import section > Import Profiles**), find the job whose import performance you want to view. (Use the filter or Find search tool at the top of the page to help you find the job.)
2. Select **Actions > Job History** in the row of the job with which you want to view more detailed information. The Job History page for the selected profile opens.

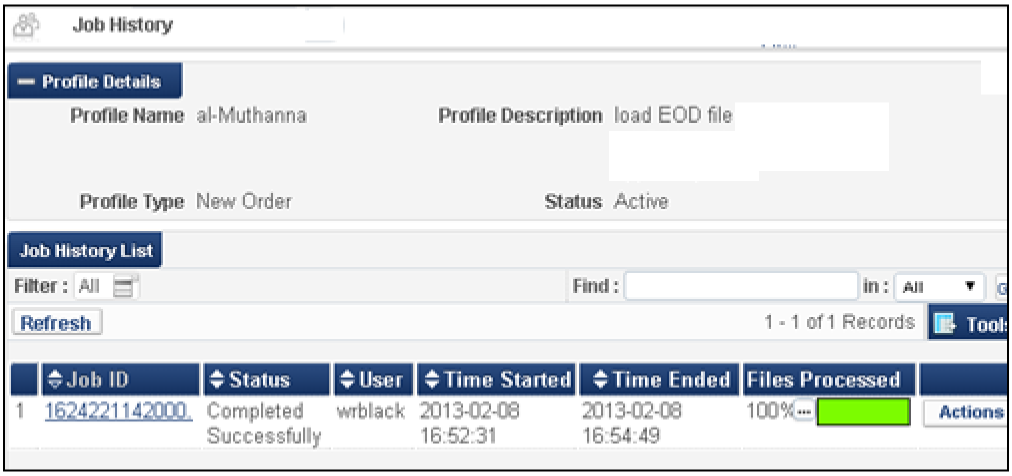


Figure 464: Job History Page

The Job History page lists the following information for each job that was run for the profile:

- Job ID
- Status
- User
- Time started
- Time ended
- Files processed (percentage complete)

The **Actions** button provides the following options for managing the jobs based on the job's status:

- Report
- View file details
- Events
- Imported records
- Imported PO lines

For information on addressing problems related to import jobs, see on page 570 and **Resolving Import Issues** on page 582.

7

Advanced Tools

Overlap Analysis

PERMISSIONS:

To work with overlap analysis, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Repository Manager
- Electronic Inventory Operator

Alma provides the capability to perform overlap analysis for electronic resources. When making acquisitions decisions, this facility enables you to compare the content of electronic collections in order to determine where there may be a subscription overlap. Alma provides the following types of comparisons:

- Set Comparison (refer to the procedure **To perform overlap analysis for a set:** on page **600** for more information)
- Selected Titles (refer to the procedure **To complete an overlap analysis for selected titles:** on page **606** for more information)

VIDEO:

For more information about Overlap Analysis, refer to the *Electronic Collection Overlap Analysis* video (7:46 mins.).

To perform overlap analysis for a set:

1. Open the Overlap Analysis page (**Resource Management > Advanced Tools > Overlap Analysis**).
2. Click **Submit New Report**. The system defaults to the Set Comparison type of report.
3. Click **Next**. The Compare Electronic Collections page opens.
4. Click **Definition of Source Set** and complete the usual repository steps to identify your source set of records.
5. Select the **Select All** option or select individual records from the repository search results to identify the records in your source set and click **Add Selected**.
6. Click **Done** when you have completed identifying the records for your source set. The system displays your source set on the Compare Electronic Collections page.

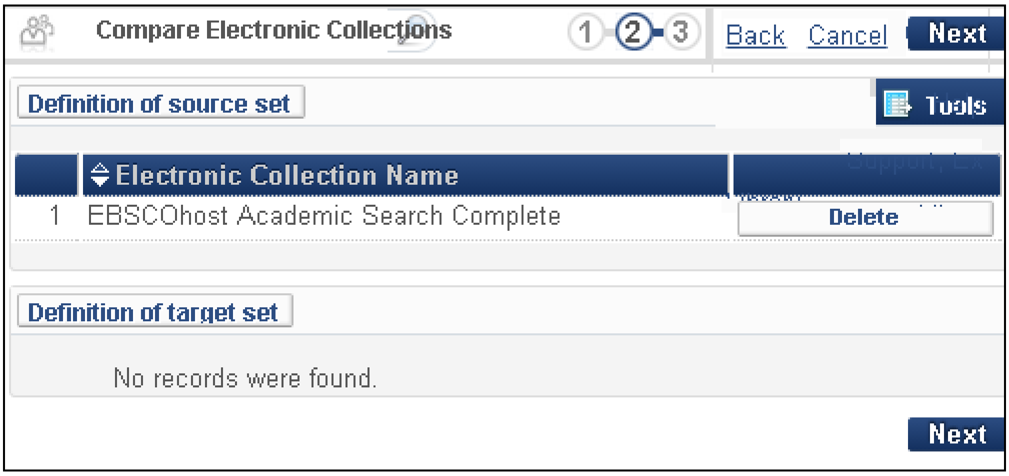


Figure 465: Source Set Defined

7. Click **Definition of Target Set** and complete the usual repository steps to identify your target set of records
8. Select the **Select All** option or select individual records from the repository search results to identify the records in your target set and click **Add Selected**.
9. Click **Done** when you have completed identifying the records for your target set. The system displays your target set on the Compare Electronic Collections page.

   You may repeat the **Definition of Target Set** steps again to define an additional target set for comparison.

10 When you have completed defining your source and target sets, click **Next**. The Compare Electronic Collections page refreshes to display the following:

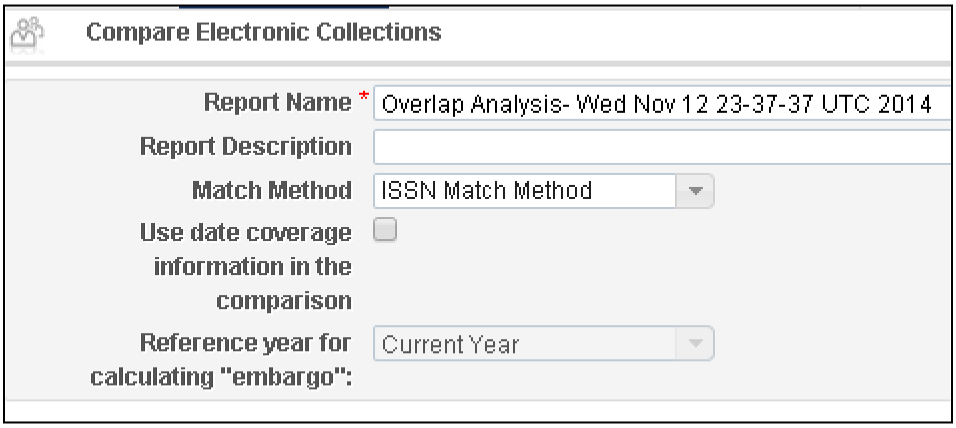


Figure 466: Compare Electronic Collections Parameters

11 Enter the following to match your requirements:

- Report name
- Report description
- Match method (ISSN, ISBN, Title, LCCN, or 035)
- Use date coverage information in the comparison (select the check box if you want to use this information)

  When you select this option, the following parameter becomes an active option.
- Reference year for calculating the embargo (make a selection from the drop-down list: Current Year, Current +1, Current +2, and so forth)

12 When you are finished setting the parameters, click **Submit**. The system displays a message confirming that your Overlap Analysis job has been successfully submitted.

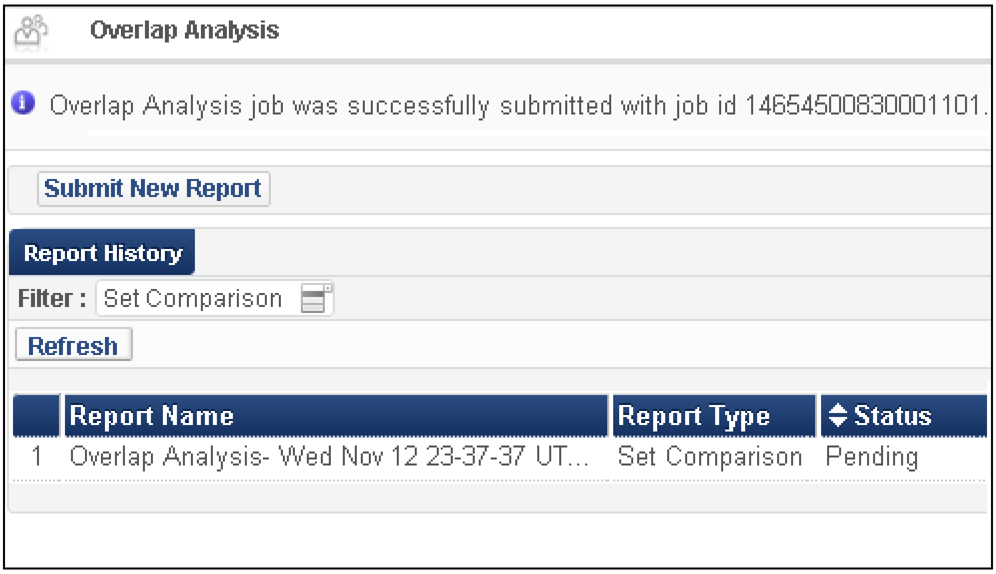


Figure 467: Successfully Submitted Overlap Analysis Job

13 Use **Monitor Jobs** (**Administration > Manage Jobs**) to track the progress of your Overlap Analysis report.

14 When your job has completed processing, select the **History** tab on the Monitor Jobs page and select **Actions > Report** to view your results. Use the **Repository** filter to more quickly locate your report. The report provides the following information:

- Process ID
- Name (of the job)
- Started on/Finished on dates and time
- Total run time
- Created by (user ID)
- Status
- Status date
- Records processed (total number)
- Records with exceptions (number)
- Links to the reports created

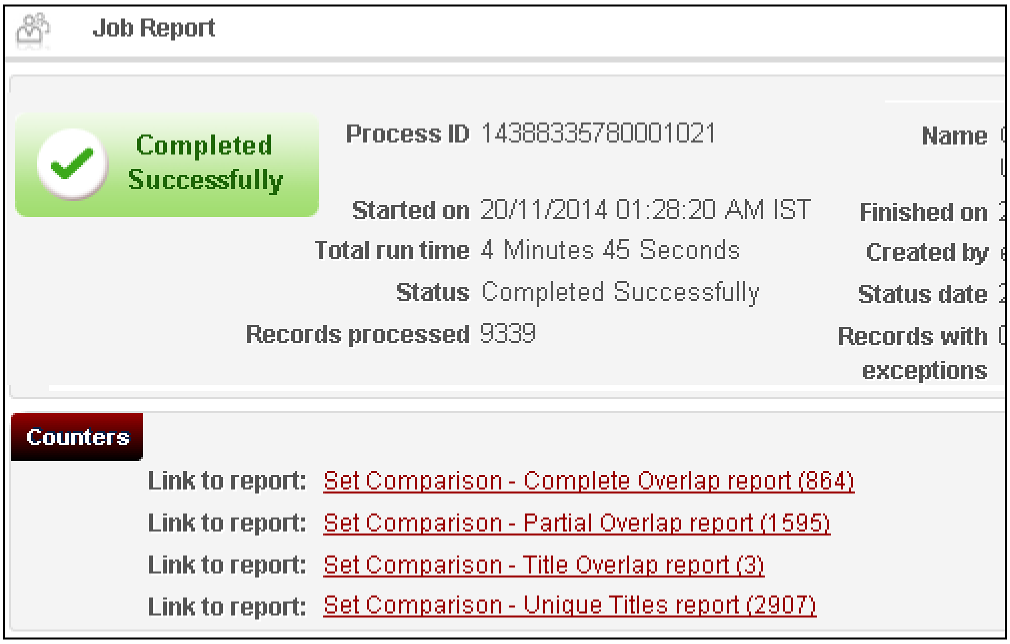


Figure 468: Overlap Comparison Report Links

15 Click the links in the results provided to view the following types of comparisons/reports (in Excel format):

- Complete Overlap Report – This report contains matching titles with identical coverage dates.
- Partial Overlap Report – This report contains matching titles with partially overlapping coverage dates.
- Title Overlap Report – This report contains matching titles with mutually exclusive coverage dates.
- Unique Titles Report – This report contains titles that are unique to the source set you created for the comparison.

Each report link has a number in parentheses indicating the number of titles in the report. For example, **Set Comparison - Title Overlap report (3)** indicates that there are three titles in the Title Overlap Report as a result of the comparison that was done.

The Complete Overlap Report, the Partial Overlap Report, and the Title Overlap Report contain the following columns:

- Title
- Identifier
- MMS ID
- Collection – Source Set

- Portfolio ID – Source Set
- Coverage – Source Set
- Collection – Target Set
- Portfolio ID – Target Set
- Coverage – Target Set

The Unique Titles Report contains the following columns:

- Title
- Identifier
- MMS ID
- Collection – Source Set
- Portfolio ID – Source Set
- Coverage – Source Set

In the Unique Titles Report, these titles are the ones that are unique to the source set that you created for the comparison.

Below is an example of a Partial Overlap Report that contains matching titles with partially overlapping coverage dates. This illustration is displayed in three sections showing rows 1 through 9 for columns A-C, D-G, and H-K of the report spreadsheet. Specifically, columns G and K show the source and target coverage overlap information. In row 2, for example, coverage years 2000 – 2011 overlap between the source and the target sets for "The South African archaeological bulletin" title.

	A	B	C
1	TITLE	Identifier	MMS ID
2	"The South African archaeological b	00381969	991271283800001021
3	"Near Eastern archaeology"	10942076 23255404	991274867700001021
4	"Proceedings of the American Philo	0003049X	991272488500001021
5	"The Athenian Agora"	23268662 15588610	991268339700001021
6	"Record of the Art Museum, Princet	0032843X 23257644	991287809000001021
7	"The classical journal"	00098353 23275812	991289980900001021
8	"African arts Arts d'Afrique."	00019933 19372108	991277629000001021
9	"Bulletin of the American Schools o	21618062 0003097X	991269716800001021

Figure 469: Partial Overlap Report Rows 1-9, Columns A-C

	D	E	F	G
1	Collection - Source Set	Interface - Source Set	Portfolio ID - Source Set	Coverage - Source Set
2	"JSTOR Arts & Scienc	"JSTOR"	53389654440001021	1945-2011
3	"JSTOR Arts & Scienc	"JSTOR"	53390424960001021	1998-2010
4	"JSTOR Arts & Scienc	"JSTOR"	53389917710001021	1838-2010
5	"JSTOR Arts & Scienc	"JSTOR"	53389001460001021	1953-2009
6	"JSTOR Arts & Scienc	"JSTOR"	53393103130001021	1948-2010
7	"JSTOR Arts & Scienc	"JSTOR"	53393576010001021	1905-2010
8	"JSTOR Arts & Scienc	"JSTOR"	53390973640001021	1967-
9	"JSTOR Arts & Scienc	"JSTOR"	53389313680001021	1921-2010

Figure 470: Partial Overlap Report Rows 1-9, Columns D-G with Source Coverage

	H	I	J	K
1	Collection - Target Set	Interface - Target Set	Portfolio ID - Target Set	Coverage - Target Set
2	"EBSCOhost Art Full Text "		53389654430001021	2000-
3	"EBSCOhost Art Full Text "		53390424950001021	1999-
4	"EBSCOhost Art Full Text "		53389917700001021	2004-
5	"EBSCOhost Art Full Text "		53423005970001021	2009-
6	"EBSCOhost Art Full Text "		53393103120001021	1996-
7	"EBSCOhost Art Full Text "		53393575990001021	1995-
8	"EBSCOhost Art Full Text "		53390973620001021	1997-2011
9	"EBSCOhost Art Full Text "		53389313670001021	1999-

Figure 471: Partial Overlap Report Rows 1-9, Columns H-K with Target Coverage

To complete an overlap analysis for selected titles:

1 Click **Submit New Report** on the Overlap Analysis page (**Resource Management > Advanced Tools > Overlap Analysis**).

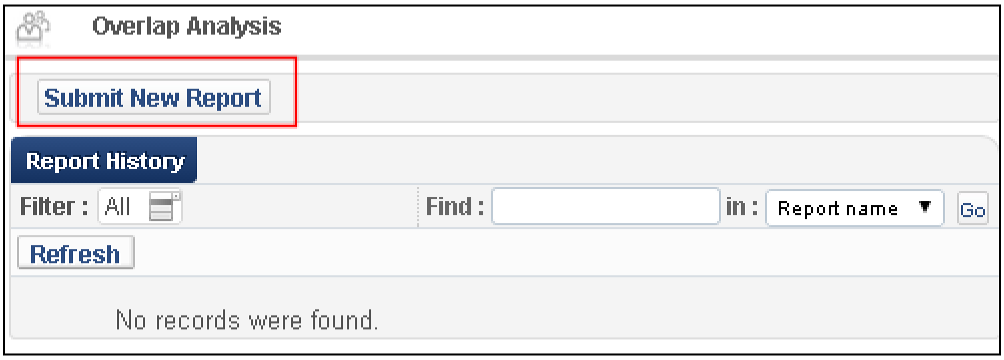


Figure 472: Submit New Report

The Overlap Analysis wizard opens.

2 From the Choose Report Type section of step 1, select the **Selected Titles** option and click **Next**.

3 From the Select File section in step 2, browse to locate the Excel file containing the unique identifiers for the selected titles you want to compare and click **Next**.

The column heading in the Excel file should identify the contents in the column as one of the following to use for matching records that you want to compare: ISBN, ISSN, LCCN, or TITLE. This Excel file is a single-column file (refer to the example below).

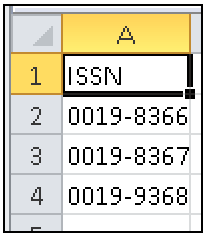


Figure 473: Example Single-Column Excel File

4 Complete the following information on the Compare Electronic Collections page:

- **Report name** – Specify a unique name or use the default that is supplied
- **Report description** – Use this option to further identify the report that his generated by Alma

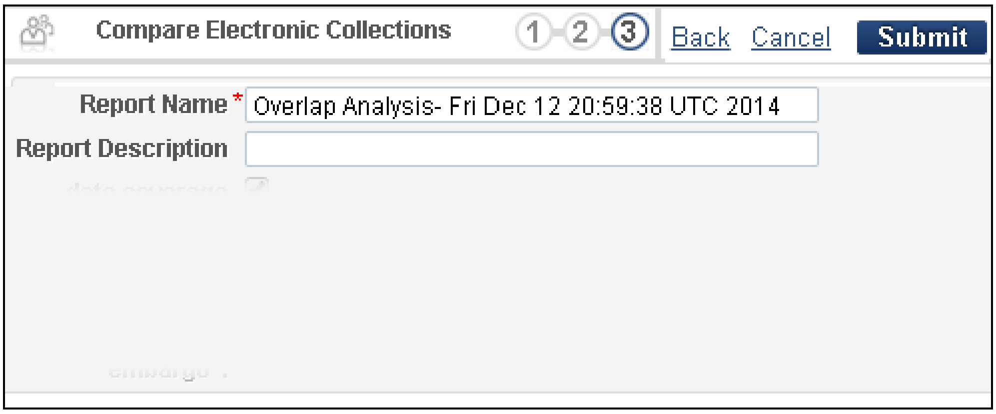


Figure 474: Compare Electronic Collections Page

5 Click **Submit**.

The system displays a message confirming that your Overlap Analysis job has been successfully submitted and displays your report job in the Report History section of the Overlap Analysis page.

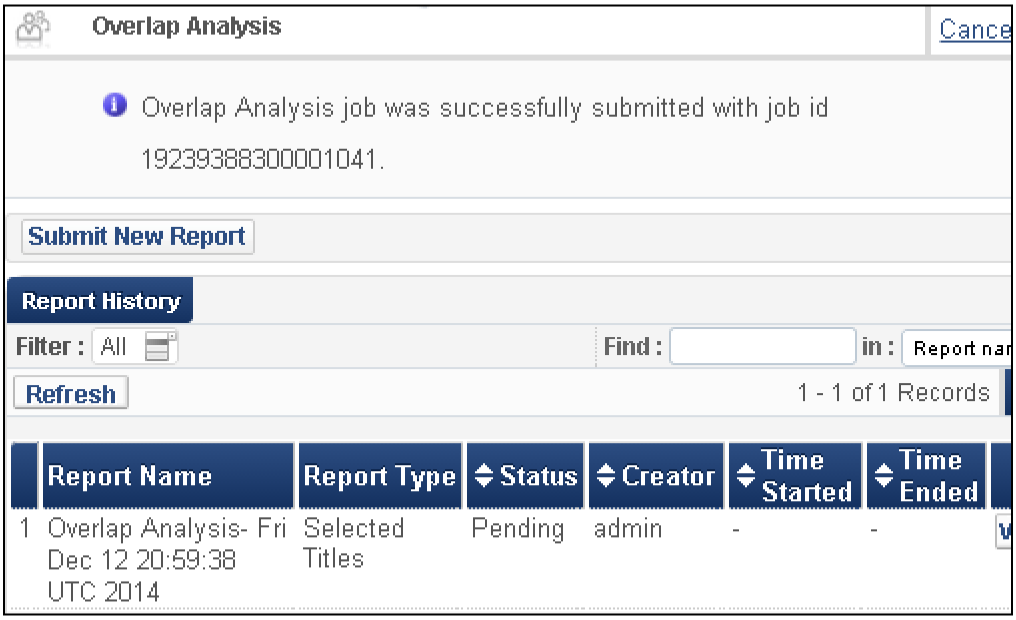


Figure 475: Overlap Analysis Job Details and Submitted Message

6 Use **Monitor Jobs** (**Administration > Manage Jobs**) to track the progress of your Overlap Analysis report.

7 When your job has completed processing, select the **History** tab on the Monitor Jobs page and select **Actions > Report** to view your results. Use the

Repository filter to more quickly locate your report. The report provides the following information:

- Process ID
- Name (of the job)
- Started on/Finished on dates and time
- Total run time
- Created by (user ID)
- Status
- Status date
- Records processed (total number)
- Records with exceptions (number)
- Links to the reports created

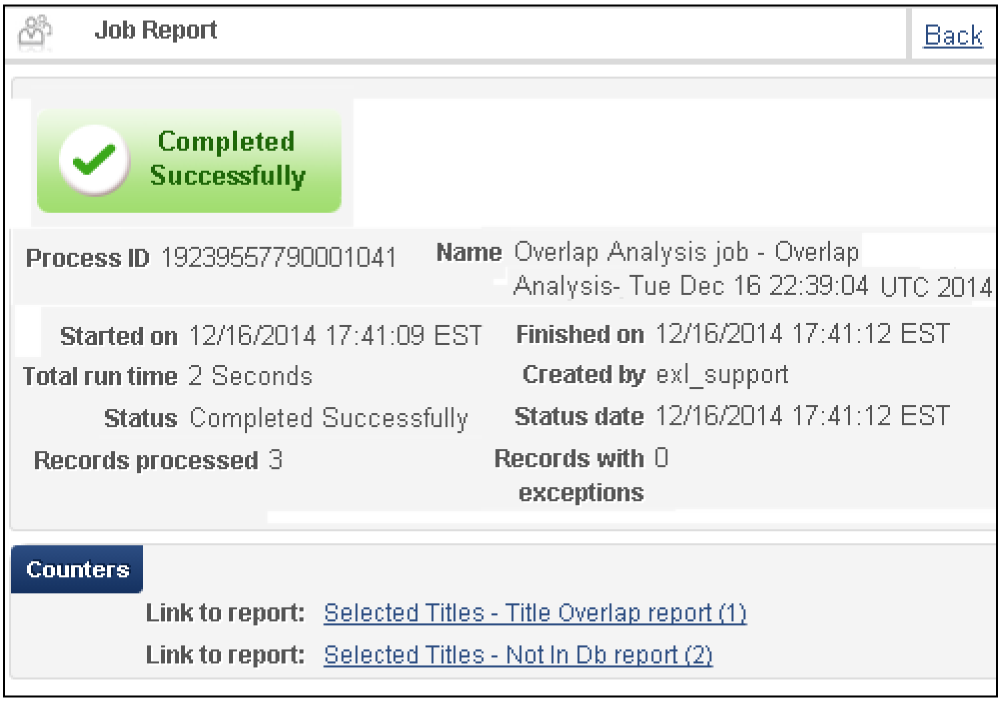


Figure 476: Overlap Comparison Report Links

8 Click the links in the results provided to view the following types of comparisons/reports (in Excel format):

- Selected Titles – Title Overlap Report – This report contains titles from the Excel file that the Overlap Analysis tool found to exist more than once in the repository.

- Selected Titles – Unique Titles Report – This report contains titles from the Excel file that the Overlap Analysis tool found to exist only once in the repository.
- Selected Titles – Not in DB Report – This report contains titles from the Excel file that the Overlap Analysis tool found did not have any matches in the repository.

Each report link has a number in parentheses indicating the number of titles in the report. For example, Selected Titles - Title Overlap report (1) indicates that there is one title in the Title Overlap Report as a result of the comparison that was done.

The Title Overlap Report and the Unique Titles Report contain the following columns:

- Title
- Identifier
- MMS ID
- Collection
- Interface
- Portfolio ID
- Coverage

The Not in DB Report contains the following column:

- Identifier

Below is an example of a Selected Titles – Overlap Report that contains matching titles with overlapping coverage dates. This illustration is displayed in four sections showing row 1 for columns A-C, D-E, F, and G of the report spreadsheet. Specifically, column G shows the coverage overlap information.

	A	B	C
1	TITLE	Identifier	MMS ID
2	"Industrial health."	00198366	99716758610001041

Figure 477: Row 1, Columns A-C

	D	E
1	Collection	Interface
2	"J-STAGE Free" "DOAJ Directory	"J-STAGE" "DOAJ Directory

Figure 478: Row 1, Columns D-E

	F
1	Portfolio ID
2	532514227580001041 532514227570001041 532561799330001041

Figure 479: Row 1, Column F

	G
1	Coverage
2	1963- 2000- 2013- 2013-

Figure 480: Row 1, Column G

8

Configuring Resource Management

This section includes:

Overview

Resource management comprises the administration of the library's many resources, processes, and search-related activities.

The infrastructure for the resource management workflows involves configuration of search methods, metadata, and creating, editing, viewing, copying, deleting, and using import and publishing profiles. The workflows include configuring search indexes, cataloging, and managing duplicate records.

This section describes how to configure the various resource management functions.

Configuring Resource Management Activities

PERMISSIONS:

To configure resource management activities, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Administrators configure the various resource management activities from the Resource Management Configuration page (from the Alma menu, select **Resource Management > Resource Configuration > Configuration Menu**).

NOTE:
During implementation, most of the Resource Management configuration can be performed only by Ex Libris Professional Services staff. Only the publishing profiles are available for customer configuration. Once your Alma system is "live" and your institution's administrators have received their Alma certification, this area is open to them.

The Configuration page displays the following:

- A filter option, enabling you to display the configuration options for configuring the institution (Main Campus) or libraries within the institution
- The available configuration options (refer to **Table 77** for a list))

NOTE:
All the configurations are available on both the institution and library levels.

The following table lists the available configuration options.

Table 77. Resource Management Configuration Options

Section	Configuration Item	Refer To:
Search Configuration	Search Indexes	**Configuring Search Indexes** on page **615**
	Customize Indexes Labels	**Configuring Index Labels** on page **627**
	External Search Resources	**Configuring External Search Resources** on page **632**
	External Search Profile	**Configuring External Search Profiles** on page **633**

Table 77. Resource Management Configuration Options

Section	Configuration Item	Refer To:
Cataloging	Metadata Configuration	**Configuring Metadata** on page **634**
	Controlled Vocabulary Registry	**Configuring Controlled Vocabulary Registry** on page **654**
Record Export	Publishing Profiles	**Configuring Publishing Profiles** on page **657**
	Exclude Process Type from Publishing	**Configuring Exclude Process Types from Publishing** on page **670**
	Map Holdings Field to Bib Records – OCLC	**Publishing to OCLC** in the *Alma Integrations with External Systems Guide*
	Institution OCLC Symbol	**Publishing to OCLC** in the *Alma Integrations with External Systems Guide*
	Map Holdings fields to Bib Records – Libraries Australia	**Publishing to Libraries Australia** in the *Alma Integrations with External Systems Guide*
	Institution NUC Symbol	**Publishing to Libraries Australia** in the *Alma Integrations with External Systems Guide*
	Export URLs	**Extracting Electronic Portfolio URLs** on page **671**
Record Import	Import Profiles	**Configuring Import Profiles** on page **675**
	Originating Systems for MD Records	**Configuring Originating Systems for MD Records** on page **676**
	Remote Digital Repositories	**Remote Digital Repositories** on page **680**
General	Other Settings	**Configuring Other Settings** on page **695**
	Processes	**Configuring Processes** on page **700**

Table 77. Resource Management Configuration Options

Section	Configuration Item	Refer To:
	Provenance Code	**Configuring Provenance Codes** on page **701**
	Accession Numbers	**Configuring Accession Numbers** on page **706**
	E Task Statuses	**Configuring E-Task Statuses** on page **710**
	Label Printing Tool	**Configuring the Label Printing Tool** on page **712**
	Call Number Parsing	**Configuring Call Number Parsing** on page **714**
	Barcode Generation	**Configuring the Barcode Generation Method** on page **723**
	Description Templates	**Configuring Description Templates** on page **725**
	Inventory Network Groups	**Configuring Inventory Available For Management Groups for Multicampus Environments** on page **730**
	Physical Item Sort Routines	**Configuring Physical Item Sort Routines** on page **734**
	Physical Material Type Descriptions	**Configuring Physical Item Material Type Descriptions** on page **740**

Search Configuration

This section describes:

- **Configuring Search Indexes** on page **615**
- **Configuring Index Labels** on page **627**
- **Configuring External Search Resources** on page **632**
- **Configuring External Search Profiles** on page **633**

Configuring Search Indexes

PERMISSIONS:

To configure search indexes, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Alma lets you configure which indexes are searched when conducting Simple and Advanced searches. You can configure the order that the indexes are searched and whether an index should be included in simple searches, advanced searches, or both. The indexes are available to be selected when performing a search. For example, locally configured indexes for the Simple search display in the Where drop-down list (see **Figure 481**).

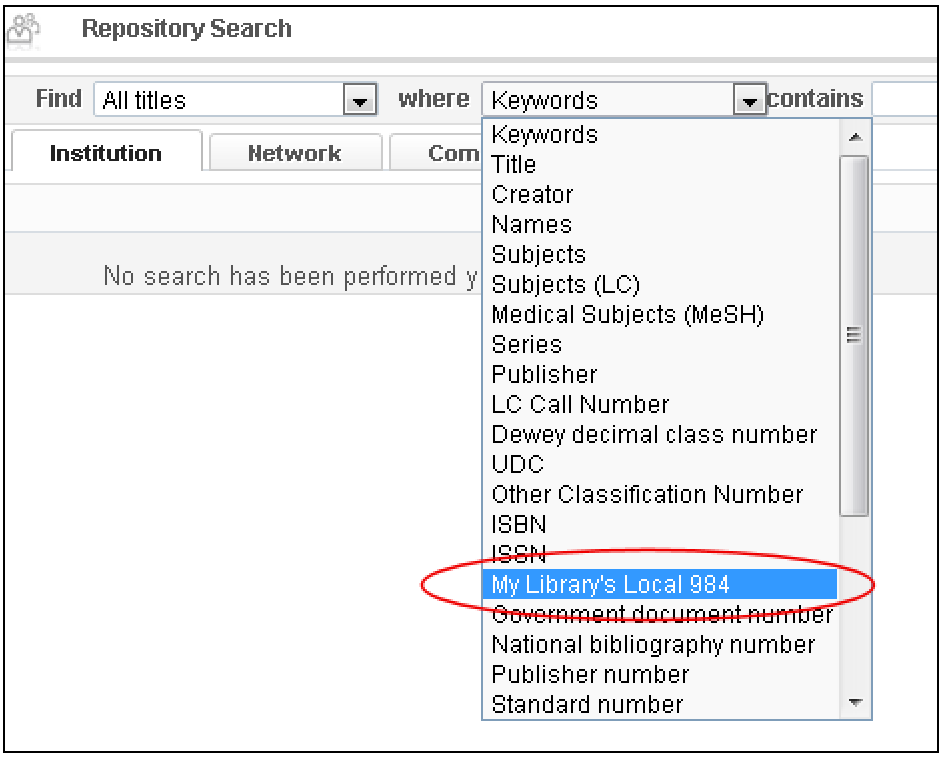


Figure 481: Local Index Configured

To customize the search index label that displays in the drop-down list, refer to **Configuring Index Labels** on page **627**.

Each MARC tag, such as the 984, is indexed as a separate searchable field and all of its subfields are indexed and searchable when the 984 is selected as the Where option.

Administrators configure search indexes from the Mapping Table page, by selecting **Search Indexes** from the **Search Configuration** section on the Configuration page (**Resource Management > Resource Configuration > Configuration Menu**).

The Mapping Table displays:

- Details about the table that contains the search indexes
- A list of the search indexes that are defined for each type of search
- A group of input fields that enable you to modify the search index

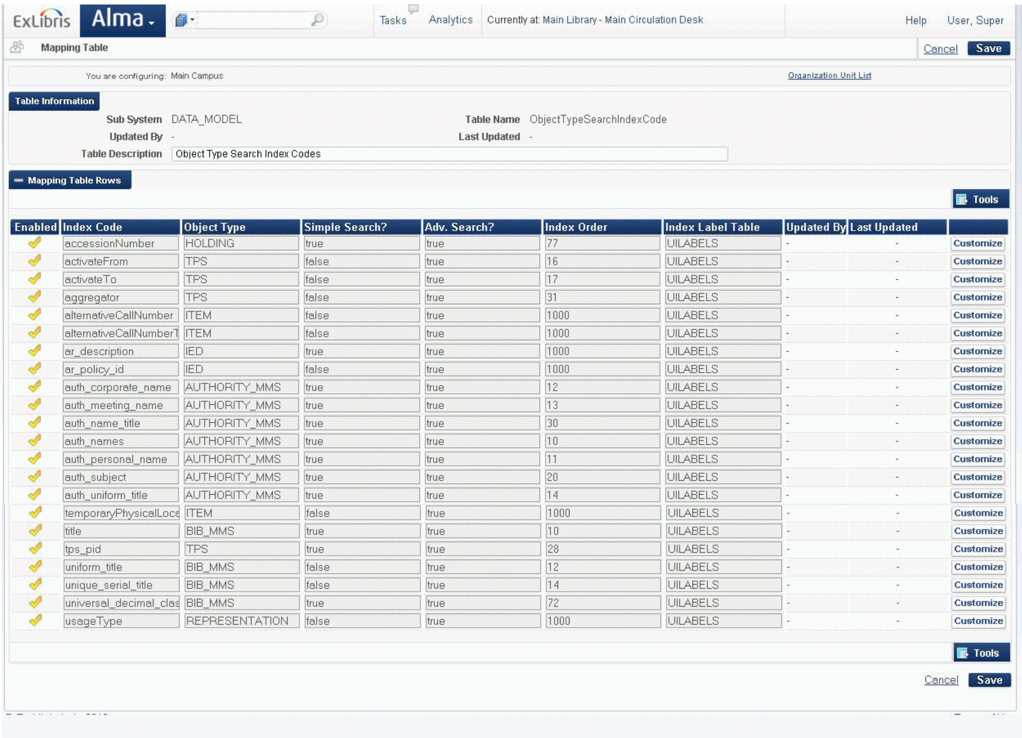
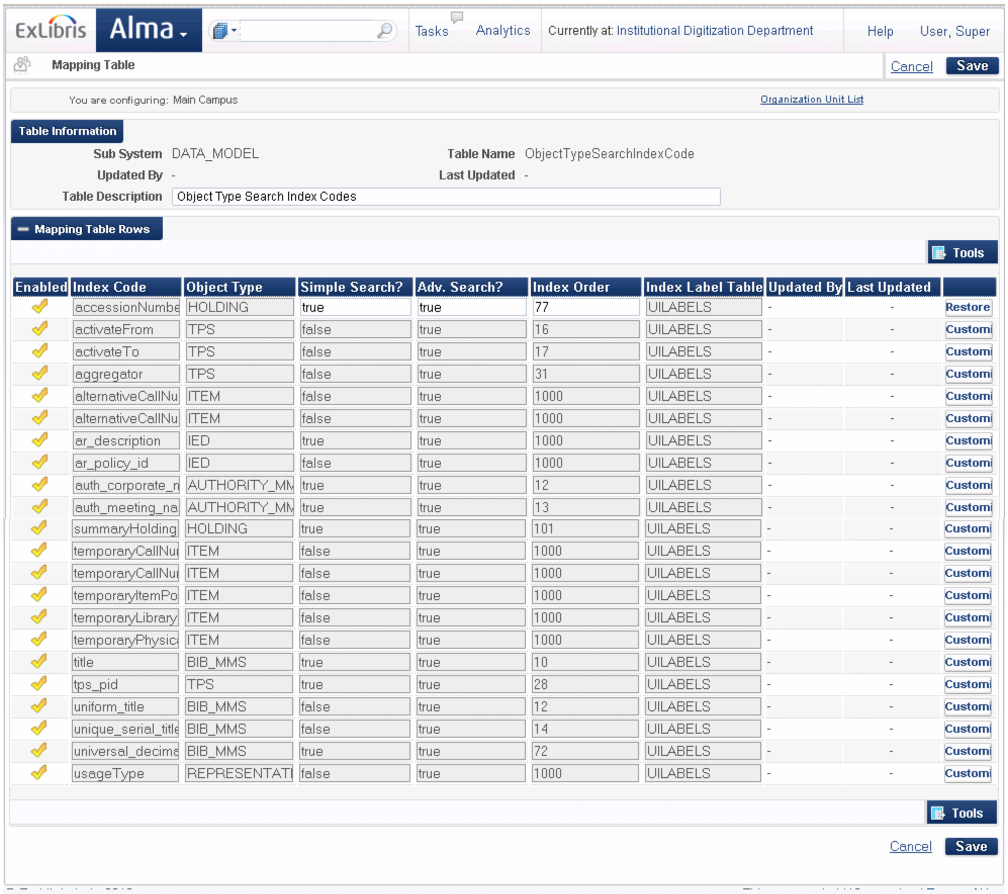


Figure 482: Mapping Table Page Search Indexes

To edit a search index:

1. On the Mapping Table page, under **Mapping Table Rows**, locate the search index that you want to edit.
2. Click **Customize**. The Mapping Table page opens for editing.



Enabled	Index Code	Object Type	Simple Search?	Adv. Search?	Index Order	Index Label Table	Updated By	Last Updated	
	accessionNumbe	HOLDING	true	true	77	UILABELS	-	-	Restore
	activateFrom	TPS	false	true	16	UILABELS	-	-	Customi
	activateTo	TPS	false	true	17	UILABELS	-	-	Customi
	aggregator	TPS	false	true	31	UILABELS	-	-	Customi
	alternativeCallNu	ITEM	false	true	1000	UILABELS	-	-	Customi
	alternativeCallNu	ITEM	false	true	1000	UILABELS	-	-	Customi
	ar_description	IED	true	true	1000	UILABELS	-	-	Customi
	ar_policy_id	IED	false	true	1000	UILABELS	-	-	Customi
	auth_corporate_n	AUTHORITY_MM	true	true	12	UILABELS	-	-	Customi
	auth_meeting_na	AUTHORITY_MM	true	true	13	UILABELS	-	-	Customi
	summaryHolding	HOLDING	true	true	101	UILABELS	-	-	Customi
	temporaryCallNu	ITEM	false	true	1000	UILABELS	-	-	Customi
	temporaryCallNu	ITEM	false	true	1000	UILABELS	-	-	Customi
	temporaryItemPo	ITEM	false	true	1000	UILABELS	-	-	Customi
	temporaryLibrary	ITEM	false	true	1000	UILABELS	-	-	Customi
	temporaryPhysic	ITEM	false	true	1000	UILABELS	-	-	Customi
	title	BIB_MMS	true	true	10	UILABELS	-	-	Customi
	tps_pid	TPS	true	true	28	UILABELS	-	-	Customi
	uniform_title	BIB_MMS	false	true	12	UILABELS	-	-	Customi
	unique_serial_title	BIB_MMS	false	true	14	UILABELS	-	-	Customi
	universal_decima	BIB_MMS	true	true	72	UILABELS	-	-	Customi
	usageType	REPRESENTATI	false	true	1000	UILABELS	-	-	Customi

Figure 483: Mapping Table Page Edit Search Indexes

3 Edit the search index as follows:

- To display a search index in the Simple Search, enter **true** in the **Simple Search** column.
- To hide a search index in the Simple Search, enter **false** in the **Simple Search** column.
- To display a search index in the Advanced Search, enter **true** in the **Adv. Search** column.
- To hide a search index in the Advanced Search, enter **false** in the **Adv. Search** column.

4 Edit the **Index Order** as follows:

- Alma uses the numerical order of the codes when applying the search indexes that are enabled and marked as **true**.
- The lower the number in the **Index Order** column, the higher the search index priority.

5 Click **Save**. The search indexes are stored in the Alma system.

NOTE:
You can, at any time, click **Restore** to restore the initial parameter value.

The following table maps the index codes as found in the Mapping Table page to the index labels as found in Alma:

Table 78. Index Codes to Search Index Labels Mapping

Index Codes	Search Index Labels
accessionNumber	Accession Number
all	Keywords
all_authority	Keywords
alternate_complete_edition	Edition
ar_description	AR description
auth_corporate_name	Corporate Name
auth_meeting_name	Meeting Name
auth_mms_id	MMS ID
auth_mms_originatingSystem	Originating System
auth_mms_sip_id	MMS SIP ID
auth_name_title	Name Title
auth_names	Names
auth_personal_name	Personal Name
auth_subject	Subject
auth_uniform_title	Uniform Title
barcode	Barcode
callNumberSuffix	Call number suffix
copyrights_note	Copyright Note
creatorName	Creator Name
depositSetId	Deposit set ID
description	Description
dewey_decimal_class_number	Dewey decimal class number
file_label	File Label

Table 78. Index Codes to Search Index Labels Mapping

Index Codes	Search Index Labels
file_note	File Note
file_pid	File PID
fulfilment_note	Fulfillment Note
general_note	Public note
generalNote	Public note
government_document_number	Government Document Number
handleId	Handle ID
harvestDate	Harvest date
holding_Note	Holding note
holding_pid	Holding PID
iec_external_system	External System
iec_external_system_id	External System Id
iec_label	Collection Name
iec_pid	Collection PID
ied_pid	IE PID
iepa_authenticationNote	Authentication Note
iepa_Library	Library
iepa_pid	Electronic Collection PID
iepa_POLineID	Collection PO Line ID
iepa_tps_accessRights	Access Rights
interfaceName	Interface Name
internal_note_1	Internal note 1
internalDescription	Internal Description
inventoryNumber	Inventory number
isbn	ISBN
issn	ISSN
issueYear	Issue year
item_pid	Item PID
itemPOLineID	PO Line

Table 78. Index Codes to Search Index Labels Mapping

Index Codes	Search Index Labels
itemSequenceNumber	Item sequence number
lc_class_number	LC Call Number
lcsh	Subjects (LC)
local_notes	Local notes
mesh	Medical Subjects (MeSH)
mms_id	MMS ID
mms_sip_id	MMS SIP ID
name	Names
national_bibliography_number	National bibliography number
notes	Notes
originating_system_id	Originating System ID
other_class_number	Other Classification Number
other_system_number	Other System Number
package_license_id	License ID
packageName	Electronic collection Name
PermanentCallNumber	Permanent call number
portfolio_accessRights	Access Rights
portfolio_authenticationNote	Authentication note
portfolio_internalDescription	Internal description
portfolio_license_id	Portfolio License ID
portfolio_pdaId	Portfolio PDA ID
portfolio_pid	Portfolio PID
portfolio_POLineID	Portfolio PO Line ID
pps_authenticationNote	Service Authentication Note
public_note	Public Note
publicNote	Public note
publisher	Publisher
publisher_number	Publisher number
representation_label	Representation Label

Table 78. Index Codes to Search Index Labels Mapping

Index Codes	Search Index Labels
representation_pid	Representation PID
series	Series
standard_number	Standard number
subjects	Subjects
summaryHolding	Summary holding
title	Title
tps_pid	Title Service PID
universal_decimal_class_number	UDC

The following table maps the search index labels as found in Alma to the index codes as found in the Mapping Table page:

Table 79. Search Index Labels to Index Codes Mapping

Search Index Labels	Index Codes
Access Rights	iepa_tps_accessRights
Access Rights	portfolio_accessRights
Accession Number	accessionNumber
AR description	ar_description
Authentication Note	iepa_authenticationNote
Authentication note	portfolio_authenticationNote
Barcode	barcode
Call number suffix	callNumberSuffix
Collection Name	iec_label
Collection PID	iec_pid
Collection PO Line ID	iepa_POLineID
Copyright Note	copyrights_note
Corporate Name	auth_corporate_name
Creator Name	creatorName
Deposit set ID	depositSetId
Description	description

Table 79. Search Index Labels to Index Codes Mapping

Search Index Labels	Index Codes
Dewey decimal class number	dewey_decimal_class_number
Edition	alternate_complete_edition
Electronic collection Name	packageName
Electronic Collection PID	iepa_pid
External System	iec_external_system
External System Id	iec_external_system_id
File Label	file_label
File Note	file_note
File PID	file_pid
Fulfillment Note	fulfilment_note
Government Document Number	government_document_number
Handle ID	handleId
Harvest date	harvestDate
Holding note	holding_Note
Holding PID	holding_pid
IE PID	ied_pid
Interface Name	interfaceName
Internal Description	internalDescription
Internal description	portfolio_internalDescription
Internal note 1	internal_note_1
Inventory number	inventoryNumber
ISBN	isbn
ISSN	issn
Issue year	issueYear
Item PID	item_pid
Item sequence number	itemSequenceNumber
Keywords	all
Keywords	all_authority
LC Call Number	lc_class_number

Table 79. Search Index Labels to Index Codes Mapping

Search Index Labels	Index Codes
Library	iepa_Library
License ID	package_license_id
Local notes	local_notes
Medical Subjects (MeSH)	mesh
Meeting Name	auth_meeting_name
MMS ID	auth_mms_id
MMS ID	mms_id
MMS SIP ID	auth_mms_sip_id
MMS SIP ID	mms_sip_id
Name Title	auth_name_title
Names	auth_names
Names	name
National bibliography number	national_bibliography_number
Notes	notes
Originating System	auth_mms_originatingSystem
Originating System ID	originating_system_id
Other Classification Number	other_class_number
Other System Number	other_system_number
Permanent call number	PermanentCallNumber
Personal Name	auth_personal_name
PO Line	itemPOLineID
Portfolio License ID	portfolio_license_id
Portfolio PDA ID	portfolio_pdaId
Portfolio PID	portfolio_pid
Portfolio PO Line ID	portfolio_POLineID
Public note	general_note
Public note	generalNote
Public Note	public_note
Public note	publicNote

Table 79. Search Index Labels to Index Codes Mapping

Search Index Labels	Index Codes
Publisher	publisher
Publisher number	publisher_number
Representation Label	representation_label
Representation PID	representation_pid
Series	series
Service Authentication Note	pps_authenticationNote
Standard number	standard_number
Subject	auth_subject
Subjects	subjects
Subjects (LC)	lcsh
Summary holding	summaryHolding
Title	title
Title Service PID	tps_pid
UDC	universal_decimal_class_number
Uniform Title	auth_uniform_title

The following table maps the Object Type column as found in the Mapping Table page to the search index types as found in Alma:

UI Search Index	Object Type									
	AUTHORITY_MMS	BIB_MMS	FILE	HOLDING	IEC	IED	ITEM	PORTFOLIO	REPRESENTATION	TPS
All Titles		x								
Authorities	x									
Collection		x			x					
Digital Titles		x	x			x			x	
Digital Files		x	x			x			x	
Electronic Collection		x						x		x
Electronic Portfolio		x						x		x
Electronic Titles		x						x		x
Physical Items		x		x			x			
Physical Titles		x		x			x			

Figure 484: Object Type to Search Index Types Mapping

Search Indexes Example

If the accession number is enabled, it is displayed as an option when performing an advanced search:

Enabled	Index Code
✓	accessionNumber

Figure 485: Accession Number Enabled

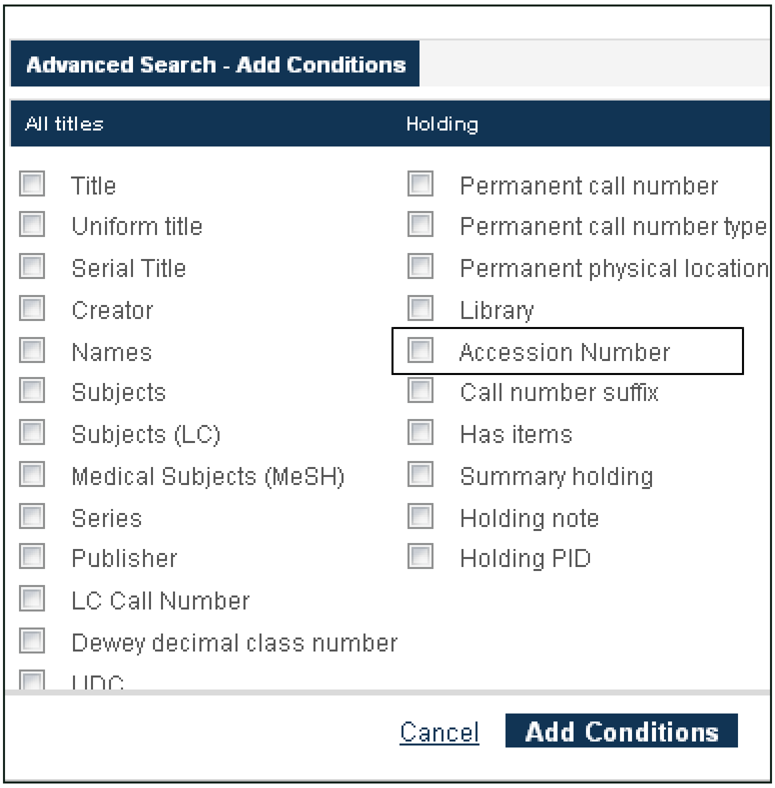


Figure 486: Accession Number Displayed

If the accession number is disabled, it is not displayed as an option when performing an advanced search:

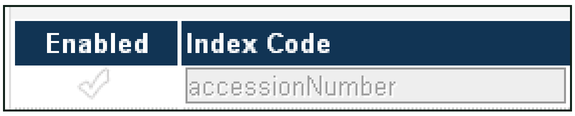


Figure 487: Accession Number Disabled

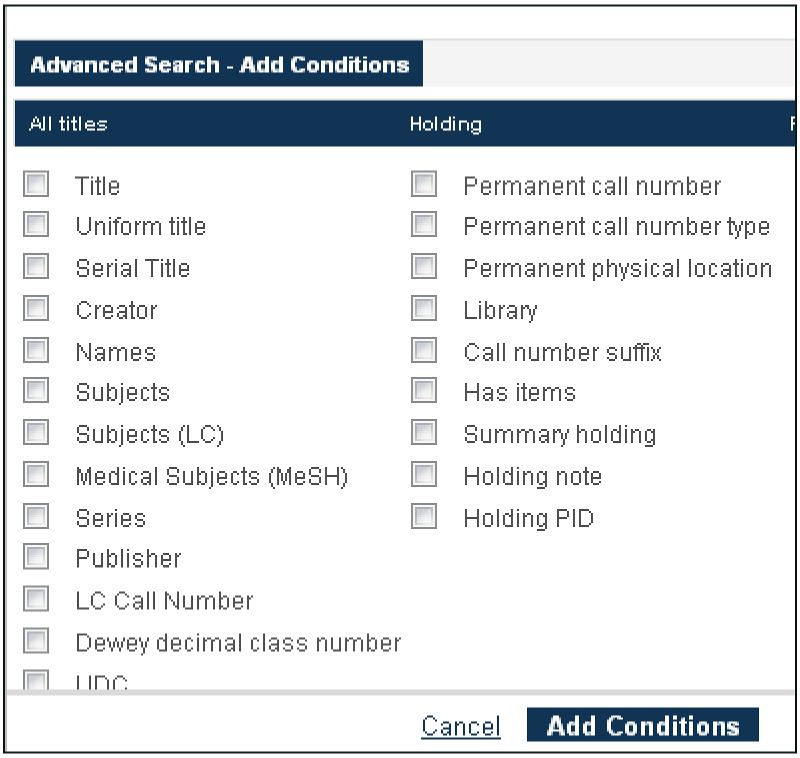


Figure 488: Accession Number Not Displayed

NOTE:

In addition, when the Accession Number is disabled, it is not searched when performing a simple search.

Refer to the How To Presentations folder in the Resource Management section of the Documentation Center (**Alma > Production Documentation > Resource Management**) for additional examples, such as the *How to Configure Indexing and Search for 9XX Fields*.

Configuring Index Labels

PERMISSIONS:

To configure index labels, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Alma lets you define the names of the index labels of local fields used in simple and advanced searches and the order in which they are displayed.

Administrators configure index labels from the Code Table page (select **Customize Indexes Labels** from the **Search Configuration** section of the **Resource Management > Resource Configuration > Configuration Menu**).

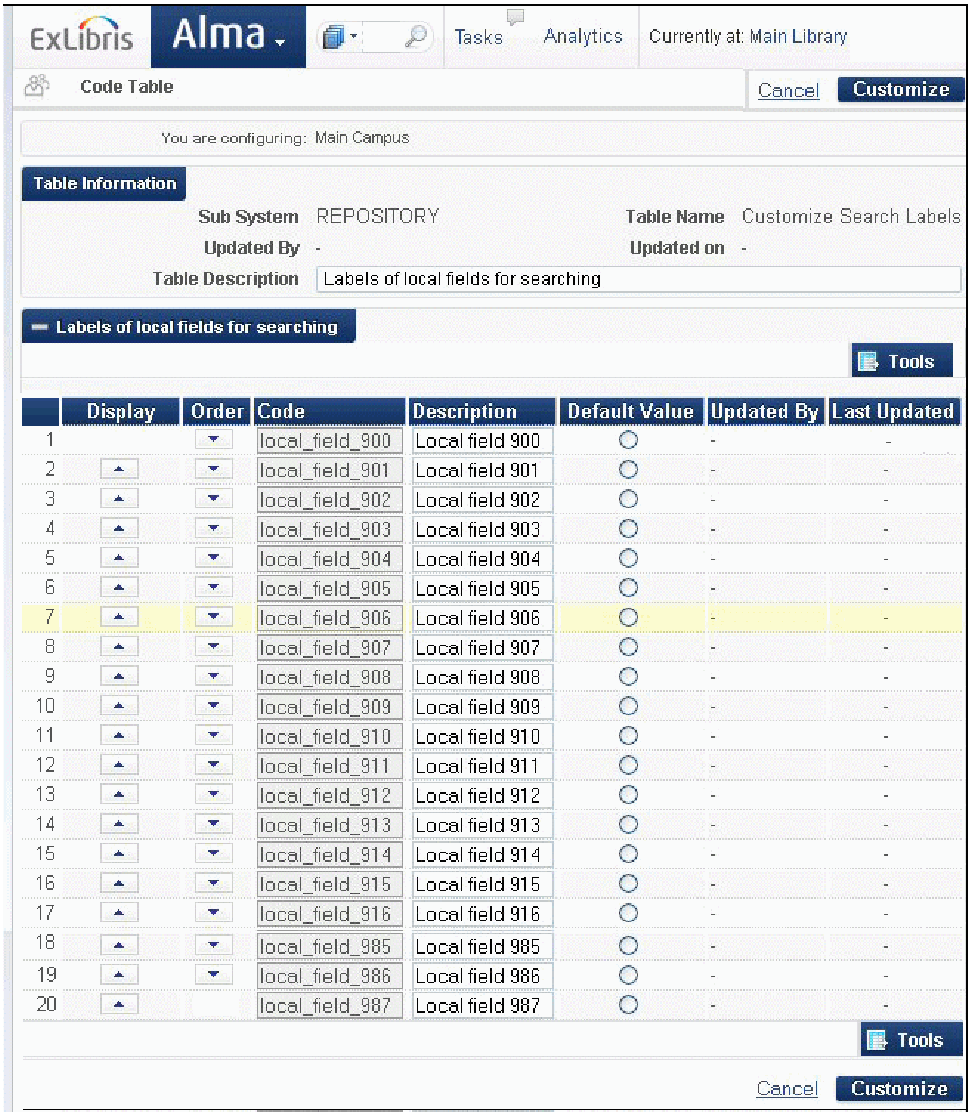


Figure 489: Code Table Page Index Labels

This page describes:

- **Navigating and Filtering the List of Index Labels** on page **629**
- **Editing (and Enabling/Disabling) Index Label Details** on page **630**

Navigating and Filtering the List of Index Labels

The Code Table page displays:

- Details about the table that contains the index labels for the institution.

  Most of the details are system-generated and cannot be edited.
- A list of the index labels that are defined for the institution
- A group of input fields that enable you to define and create a new index label

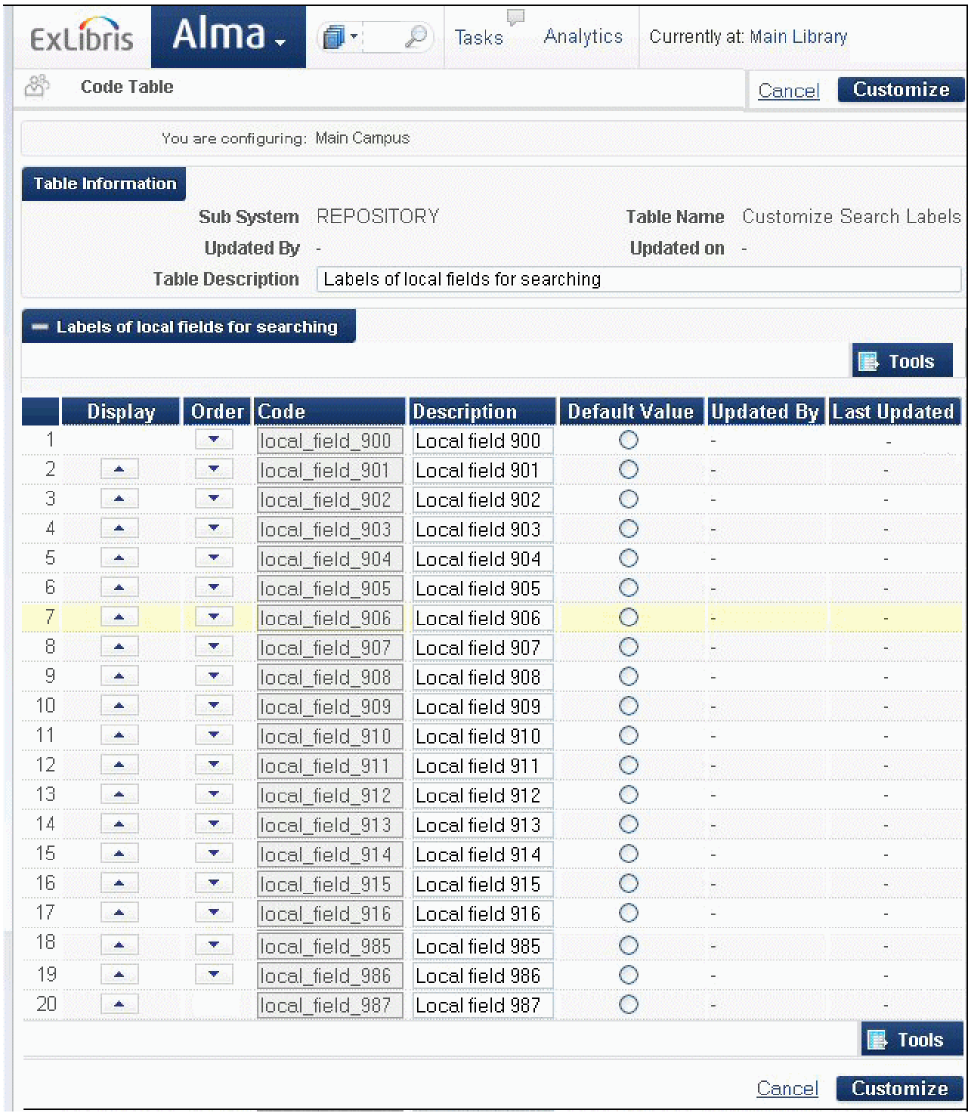


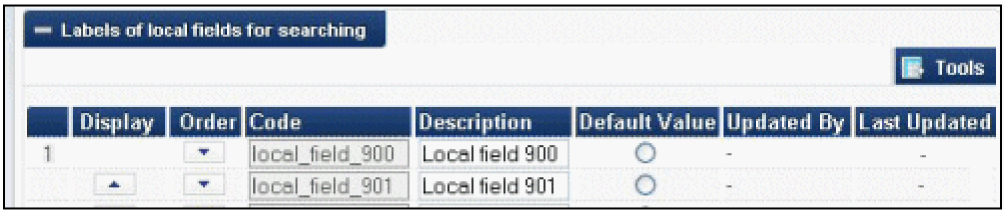
Figure 490: Code Table Page Index Labels

Editing (and Enabling/Disabling) Index Label Details

You can edit the details of any index label.

To edit the details of an index label:

1. On the Code Table page, under **Labels of local fields for searching**, locate the index label that you want to edit.



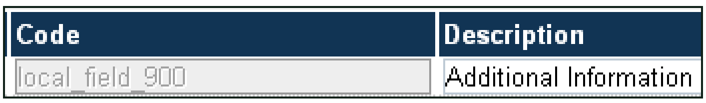
	Display	Order	Code	Description	Default Value	Updated By	Last Updated
1		▾	local_field_900	Local field 900	○	-	-
	▴	▾	local_field_901	Local field 901	○	-	-

Figure 491: Code Table Page List of Index Labels

2. Use the **Display** or **Order** up and down arrows to set the order of the index labels. The index labels display in the defined order in all **Labels of local fields for searching** drop-down lists such as the Where drop-down list in the Simple Search (see **Figure 481**).
3. Modify the index label code and description as required.
4. Select **Default Value** if the new index label is to be the default index label whenever a **Labels of local fields for searching** drop-down list is displayed.
5. Click **Customize** to store the modified index label in the system.

Configuring Index Label Example

If the local field 900 is named **Additional Information**, the Additional Information field is displayed when performing a search:



Code	Description
local_field_900	Additional Information

Figure 492: Local Field 900 – Additional Information

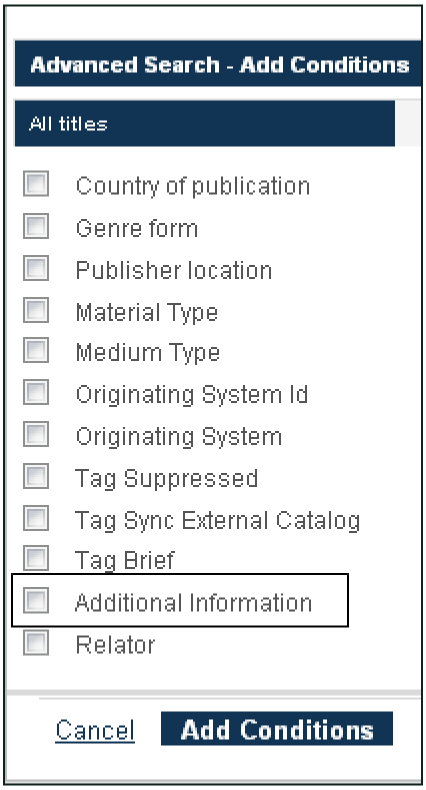


Figure 493: Advanced Search – Additional Information

If you change the name of the local 900 field to **More Information**, the More Information field is displayed when performing a search:

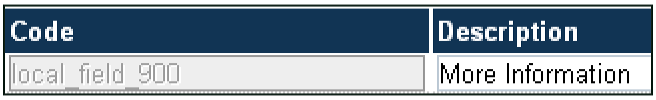


Figure 494: Local Field 900 – More Information

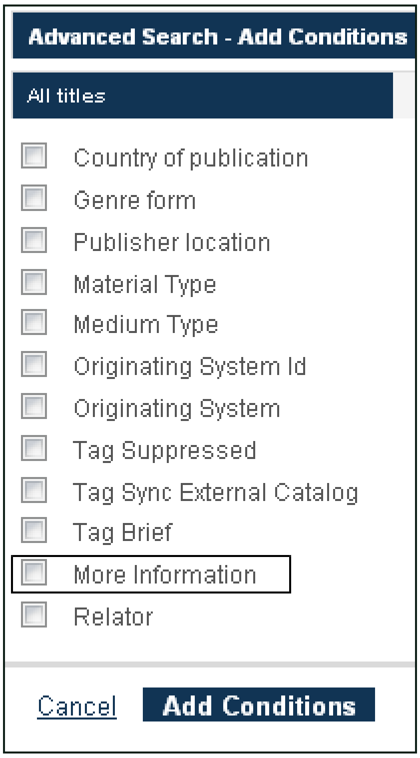


Figure 495: Advanced Search – More Information

Refer to the How To Presentations folder in the Resource Management section of the Documentation Center (**Alma > Production Documentation > Resource Management**) for additional examples such as the *How to Configure Indexing and Search for 9XX Fields*.

Configuring External Search Resources

You configure external resources from the Search External Resource Setup page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **External Search Resources** from the **Search Configuration** section on the Configuration page.

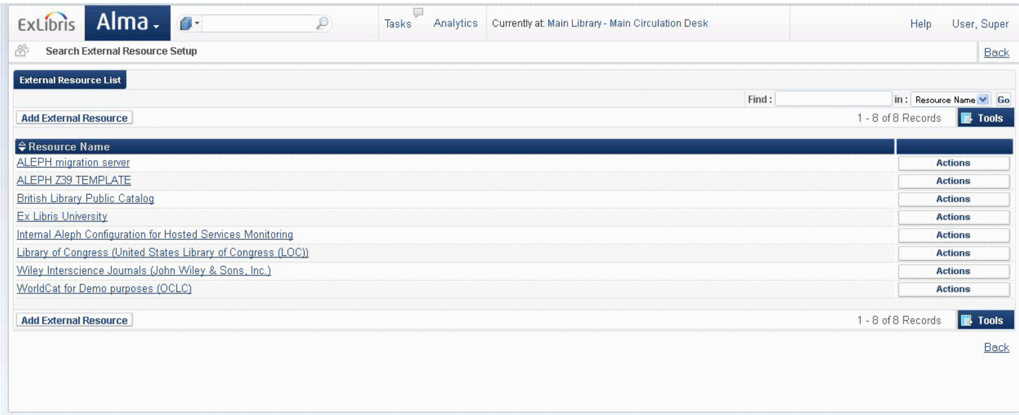


Figure 496: Search External Resource Setup Page

For information on configuring external search resources, see **External System Search** in the *Alma Integrations with External Systems Guide*.

Configuring External Search Profiles

PERMISSIONS:

To configure external search profiles, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Once you configure external search resources, you create a search profile that defines the order in which the external resources are searched, as well as the search conditions. For information on configuring external search profiles, see **External System Search** in the *Alma Integrations with External System Guide*.

You configure external profiles from the External Search Profile List page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **External Search Profile** from the **Search Configuration** section on the Configuration page.

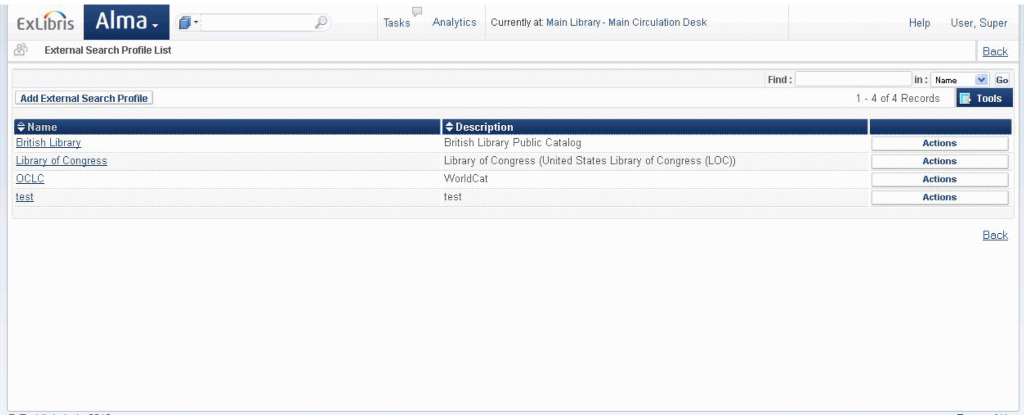


Figure 497: External Search Profile List

Cataloging

This section describes:

- **Configuring Metadata** on page **634**
- **Configuring Controlled Vocabulary Registry** on page **654**

Configuring Metadata

PERMISSIONS:

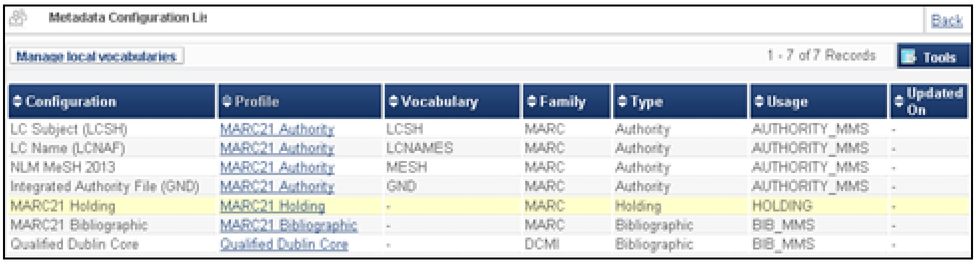
To configure metadata, you must have one the following roles:

- Cataloging Administrator
- General System Administrator

In this section you can configure the following characteristics of the MD Editor:

- which metadata fields and subfields display in the metadata editor and if they are repeatable
- if the subfields use a controlled vocabulary
- normalization processes
- validation processes

You configure the metadata fields from the Metadata Configuration List page (**Resource Management** > **Resource Configuration** > **Configuration Menu** > **Cataloging** > **Metadata Configuration**).



Metadata Configuration List

Back

Manage local vocabularies

1 - 7 of 7 Records

Tools

Configuration	Profile	Vocabulary	Family	Type	Usage	Updated On
LC Subject (LCSH)	MARC21 Authority	LCSH	MARC	Authority	AUTHORITY_MMS	-
LC Name (LCNAF)	MARC21 Authority	LCNAMES	MARC	Authority	AUTHORITY_MMS	-
NLM MeSH 2013	MARC21 Authority	MESH	MARC	Authority	AUTHORITY_MMS	-
Integrated Authority File (GND)	MARC21 Authority	GND	MARC	Authority	AUTHORITY_MMS	-
MARC21 Holding	MARC21 Holding	-	MARC	Holding	HOLDING	-
MARC21 Bibliographic	MARC21 Bibliographic	-	MARC	Bibliographic	BIB_MMS	-
Qualified Dublin Core	Qualified Dublin Core	-	DCMI	Bibliographic	BIB_MMS	-

Figure 498: Metadata Configuration List Page

Refer to **Working with Authority Records** on page **184** for additional information related to global and local authority records in Alma.

This section describes:

Viewing a List of Metadata Profiles

The Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration**) displays a list of metadata profiles that are defined for the institution, a link to each profile, and the following information (when available) for each profile:

- Vocabulary
- Family
- Type
- Usage
- Updated on (date)

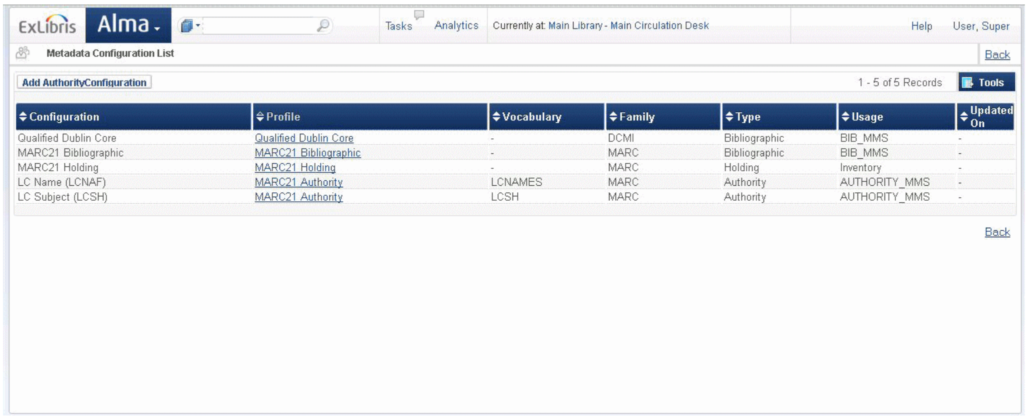


Figure 499: Metadata Configuration List Page

Viewing Metadata Profile Details

The Profile Details page displays a list of metadata profile details.

To view metadata profile details:

1 On the Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration**), click the name of the profile you want to view. The Profile Details page opens.

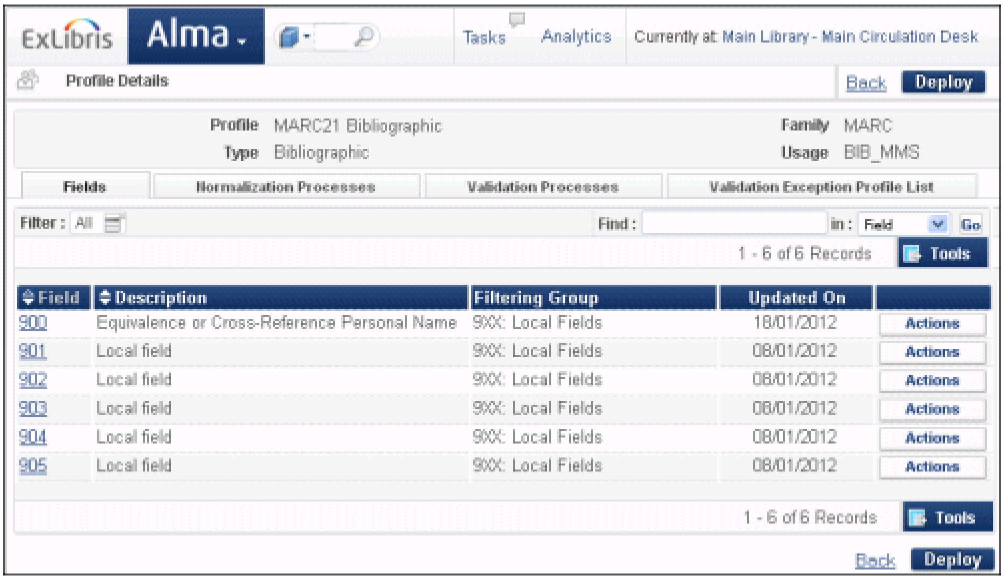


Figure 500: Profile Details Page

2 Select **Actions > View** for the profile details you want to view. The Field Details page opens.

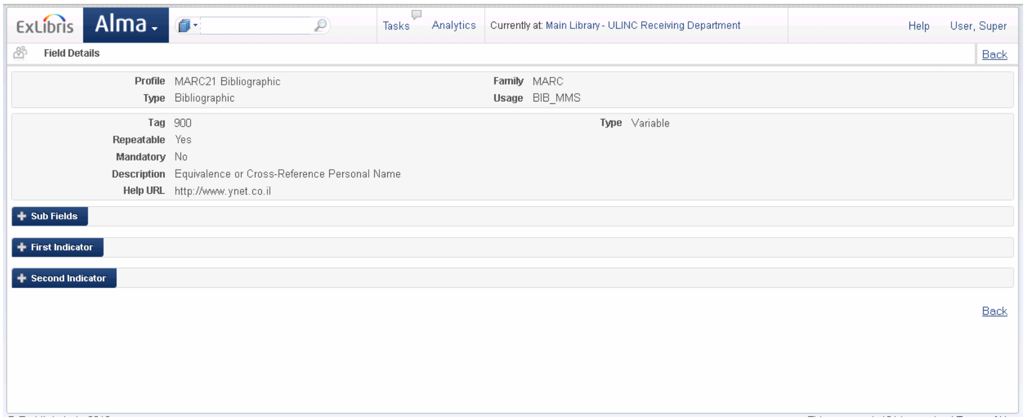


Figure 501: Field Details Page

3 Click **Back** to return to the Profile Details page.

Editing Profile Details

You can modify the details of a metadata profile using the options provided in the following tabs that display on the Profile Details page:

- Fields – see **Editing Fields** on page **638**
- Normalization Processes – see **Working with Normalization Processes** on page **643**
- Validation – see **Editing Validation Routines** on page **649**
- Validation Exception Profile List – see **Working with Validation Exception Profiles** on page **652**

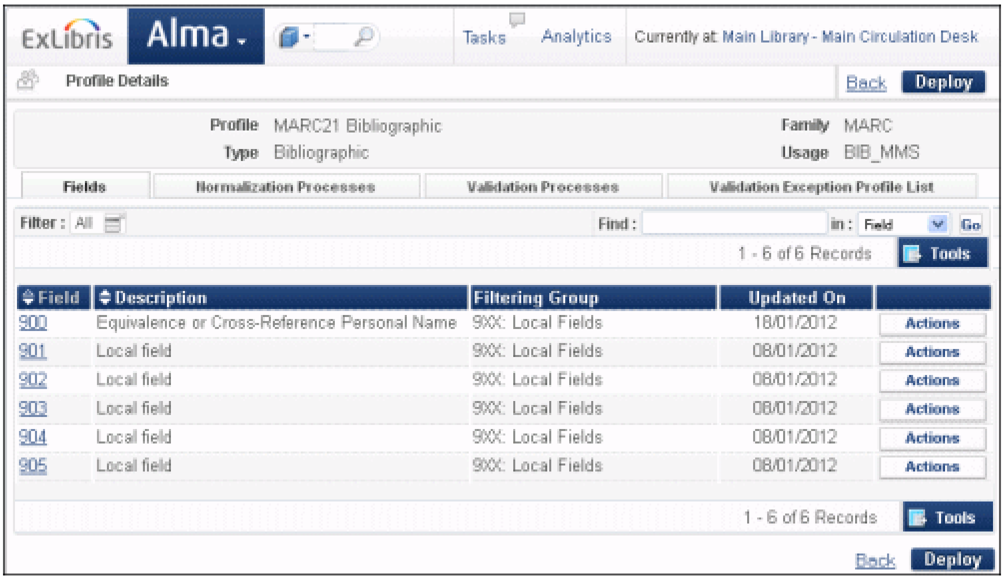


Figure 502: Profile Details Page

Editing Fields

From the Fields tab on the Profile Details page for a specific metadata configuration profile, you can edit (**Actions > Customize**) the fields of a metadata profile as described in the **To edit fields:** procedure below.

The fields that are available to edit is determined by profile link/type (bibliographic, holdings, authority, or Qualified Dublin Core) that you select on the Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration**). When you click the profile link, the Profile Details page opens to the Fields tab that displays all the fields that you are able to customize. Using the Filter and Find options enable you to easily locate the field that you want to customize.

Specific to the Qualified Dublin Core metadata configuration profile, you can also add fields in addition to editing fields (refer to **Adding a Field to the Qualified Dublin Core Metadata Configuration Profile** on page **642** for more information).

To edit fields:

NOTE:
This procedure describes the process for editing bibliographic fields. The process is similar for holdings, authority, and Qualified Dublin Core.

1 On the Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata**

Configuration), click the name of the profile you want to edit. The Profile Details page opens.

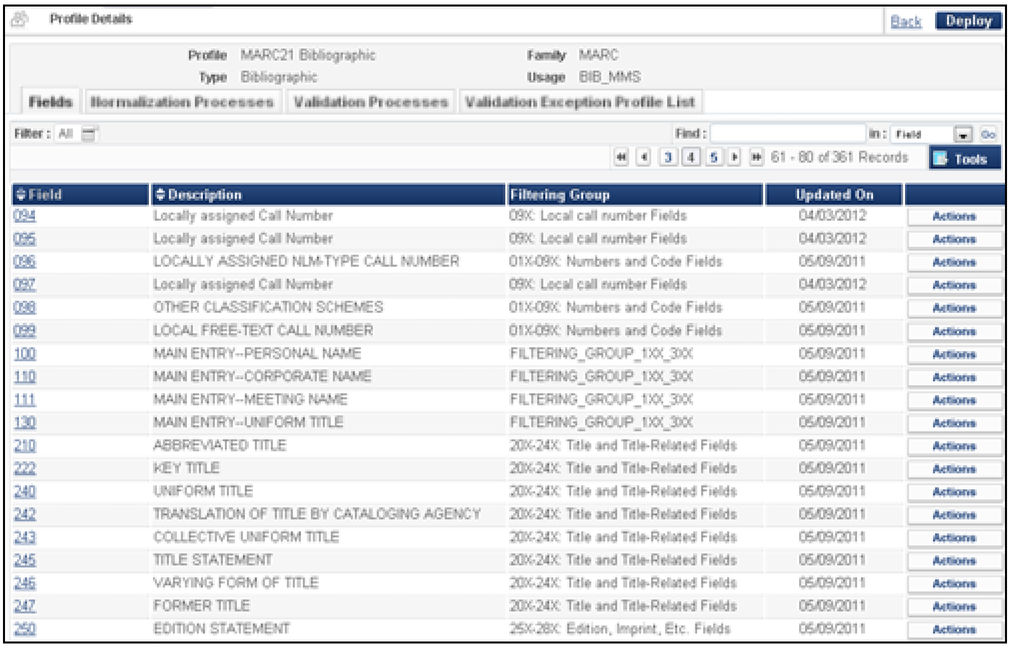


Figure 503: Profile Details Page

2 Locate the field you want to edit using the **Filter** drop-down list or the **Find** search option to locate a specific **Field** or **Description**.

3 Select **Actions > Customize** for the field you want to edit. The Field Details page opens.

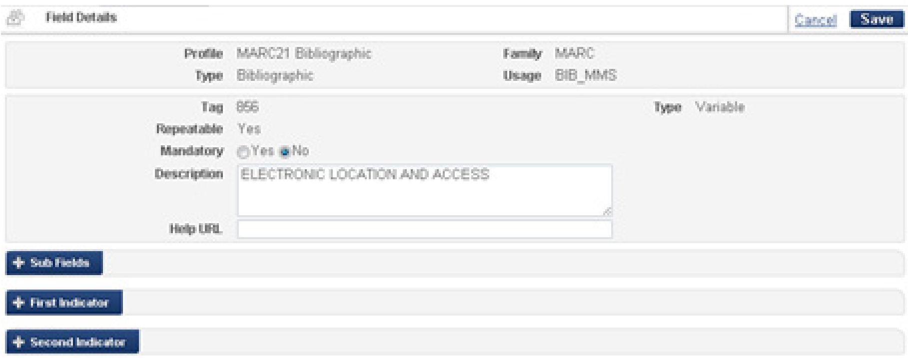


Figure 504: Field Details Page

4 Edit the following field options (which may vary) to match your requirements:

- Mandatory - Specify **Yes** or **No**.
- Description - Optionally edit to provide details for your reference.
- Help URL - Enter a URL that can be used for help.

  The help information that this URL points to displays on the Info tab in the MD Editor.

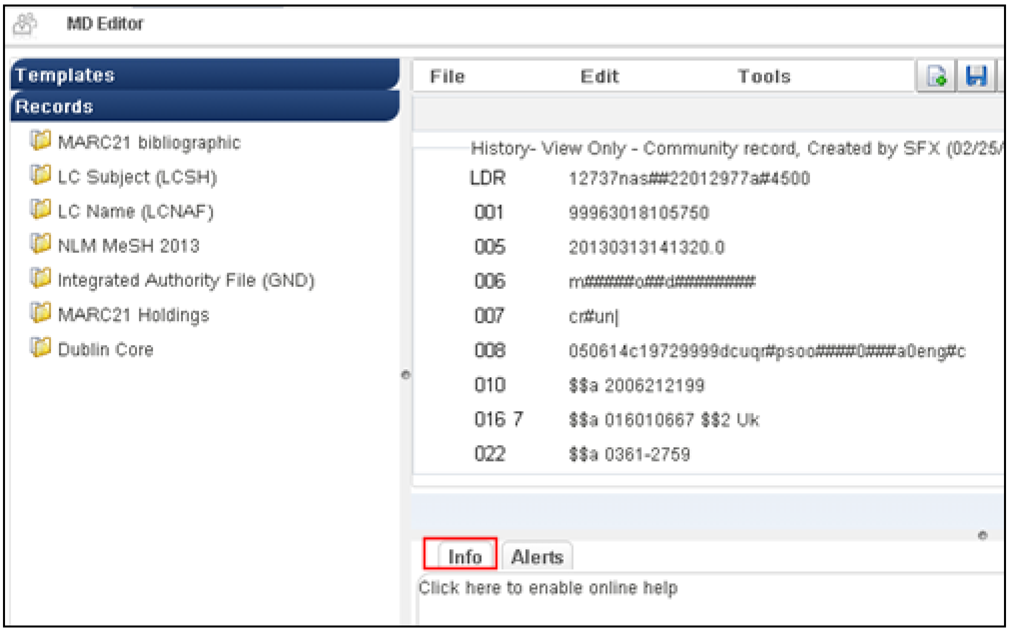


Figure 505: MD Editor Info Tab Related to the Help URL Option

- Subfields - Click the plus sign to expand this section, and click **Assign** for the subfield you want to edit.

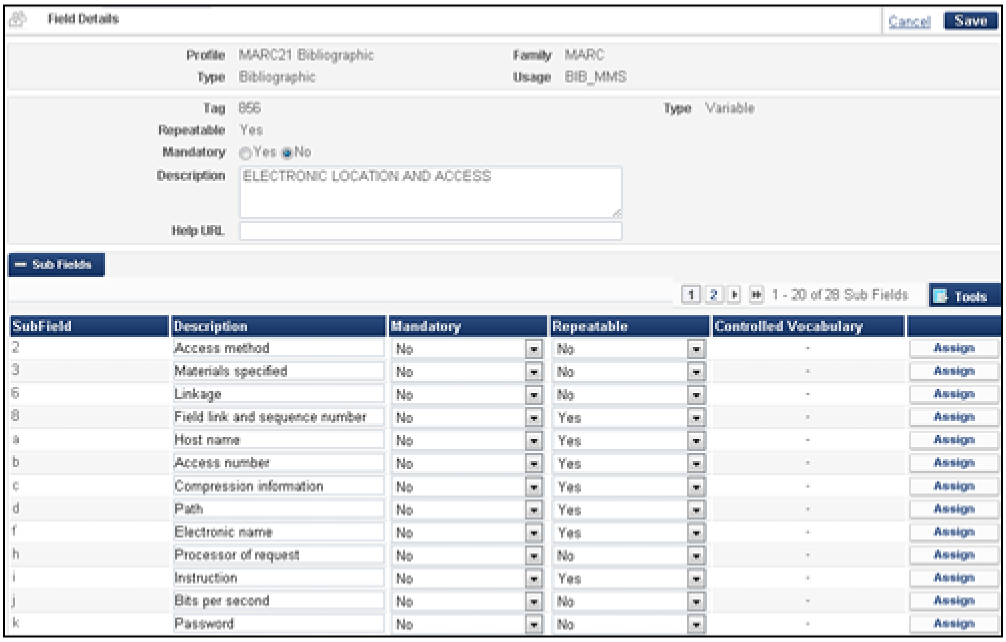


Figure 506: Subfields Section Expanded

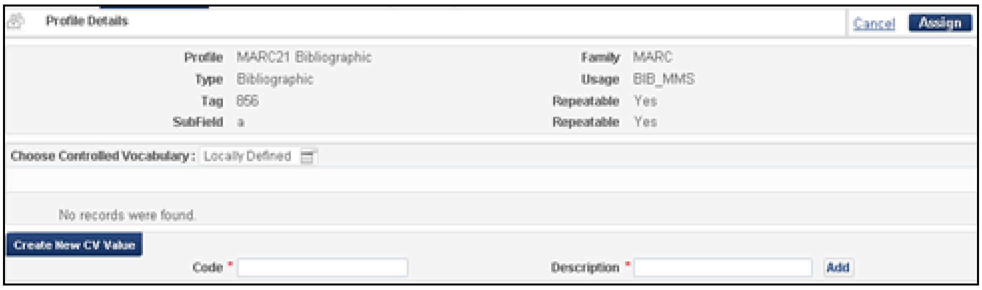


Figure 507: Assign Controlled Vocabulary

- Select a controlled vocabulary (CV) from the drop-down list and click **Assign**. The options displayed in this list are configured in **Configuring Controlled Vocabulary Registry** on page 654.
- For your convenience, you may use the **Create New CV Value** section to add controlled vocabulary terms. The terms that you add here will only apply to the field that you are editing. If you want to use these terms with another/different field, use the Controlled Vocabulary Registry (refer to **Configuring Controlled Vocabulary Registry** on page 654) to create a CV that may be used for more than one field.

To add a new controlled vocabulary value in the **Create New CV Value** section, enter a code and description and click **Add**. When you are finished adding terms, click **Assign**.

- First Indicator - Make any required changes.
- Second Indicator - Make any required changes.

5 Click **Save**. The field changes are saved in the metadata profile.

6 Click **Deploy**.

Adding a Field to the Qualified Dublin Core Metadata Configuration Profile

The Fields tab on the Profile Details page for the Qualified Dublin Core metadata configuration profile contains a list of each of the metadata fields contained in the profile. You can add a field to the metadata profile using the steps below. To edit the fields on the Fields tab, see **Editing Fields** on page **638**.

To add a field:

1 In the **Fields** tab, click the **Add Field** button (available for some of the profiles). The page for adding a field opens.

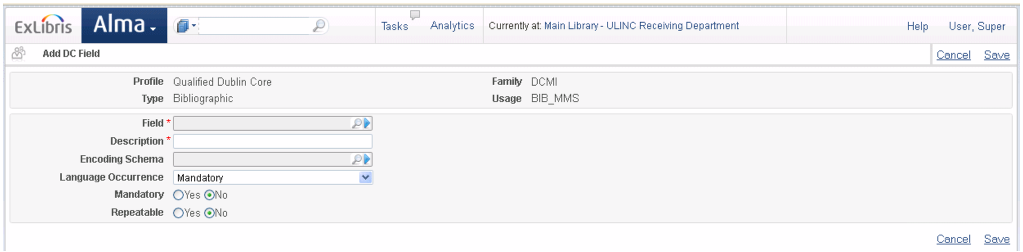


Figure 508: Adding a Field

2 In the **Field** field, select a field from the metadata list of fields.

3 In the **Description** field, enter a description for the new field.

4 In the **Encoding Schema** field, select a schema for the new field.

5 In the **Language Occurrence** drop-down list, select **Disallowed**, **Mandatory**, or **Optional**.

6 If the field you are adding is required, select the **Yes** radio button for **Mandatory**.

7 If the field you are adding is a repeatable field, select the **Yes** radio button for **Repeatable**.

8 Click **Save**. The field is saved in the metadata profile.

Restoring Profile Field Details

You can restore the profile details to the default values.

To restore the default profile field details:

1 On the Metadata Configuration List page, click the link in the Profile column for the profile that contains the field you want to restore. The Profile Details page opens on the Fields tab.

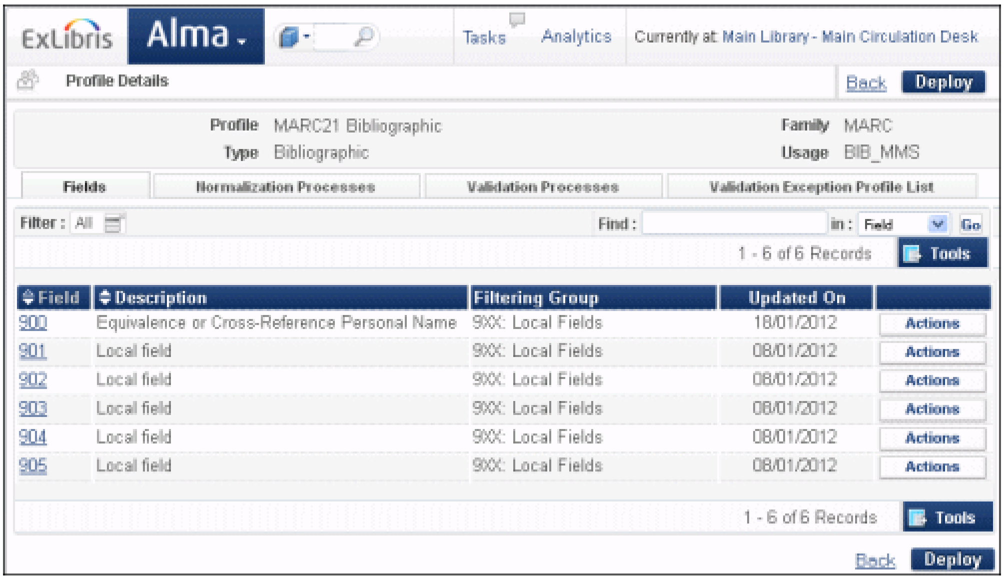


Figure 509: Profile Details Page

2 Select **Actions > Restore** for the profile details that you want to restore. The profile change that was locally customized is restored to the field's default value.

3 Click **Deploy**.

Working with Normalization Processes

Normalization processes are used to correct or update metadata records such as sorting a record's fields, removing empty fields, or stripping out fields containing order information.

You can perform the following actions in the **Normalization Processes** tab on the Profile Details page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration >** click **Profile Link**):

- Create a customized normalization process – Shared normalization rules can be defined through the MD Editor, then added to processes and used in profiles. See the **To add a process:** procedure below.

NOTE:

Normalization processes can be identified from the **Administration > Manage Jobs > Run a Job** by filtering on their type **MARC 21 Bib normalization**. Refer to the section **Running Jobs on Defined Sets** on page **305** for more information.

- Edit a normalization process – Select **Actions > Edit**.
- Disable a normalization process – If the normalization process is not currently required but may be required in the future, you can disable it by clicking the process' yellow check mark. The check mark turns gray to indicate that the rule is disabled. (To re-enable it, click the gray check mark.)

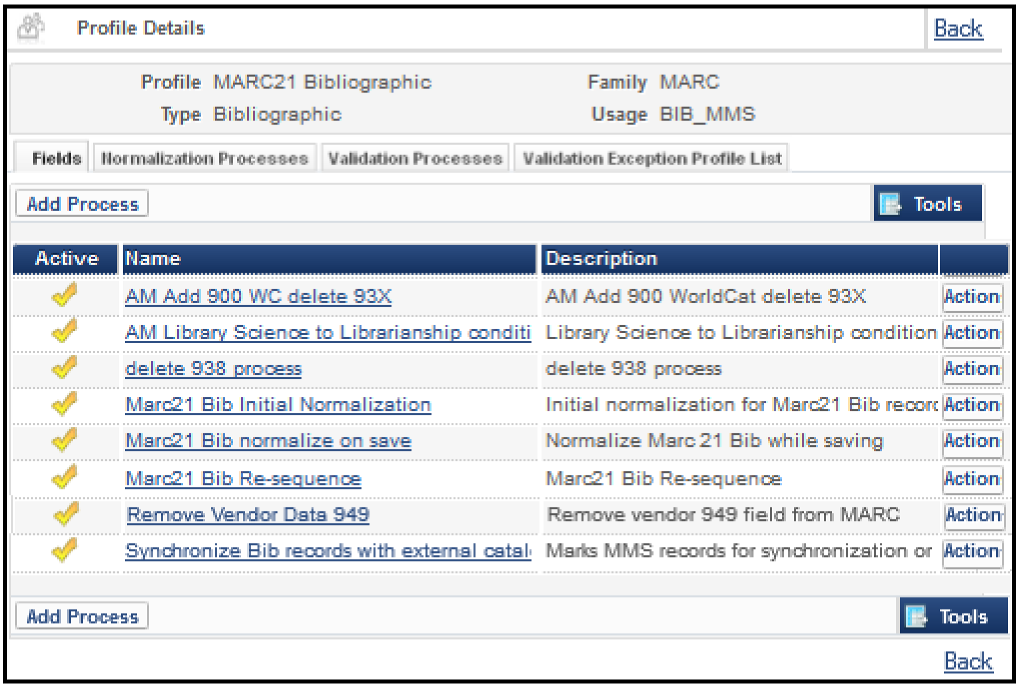


Figure 510: Profile Details Page, Normalization Processes Tab

To add a process:

1 In the **Normalization Processes** tab on the Profile Details page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration >** click **Profile Link**), click **Add Process**. The first page of the wizard opens.

Figure 511: Process Details Page

NOTE:
If you want to create a copy of an existing process, select **Actions > Copy**. Once you have copied the process, you can edit it as needed.

2 In the **General Information** section:

- Enter the name and description for the process. These values will be visible to users on the Process List page.
- In the **Status** field, select whether the process is available (**Active**) or not. A process that is inactive can be stored and edited in the system without being run. It can be made active at any time.

3 Click **Next**. The next page of the wizard opens.

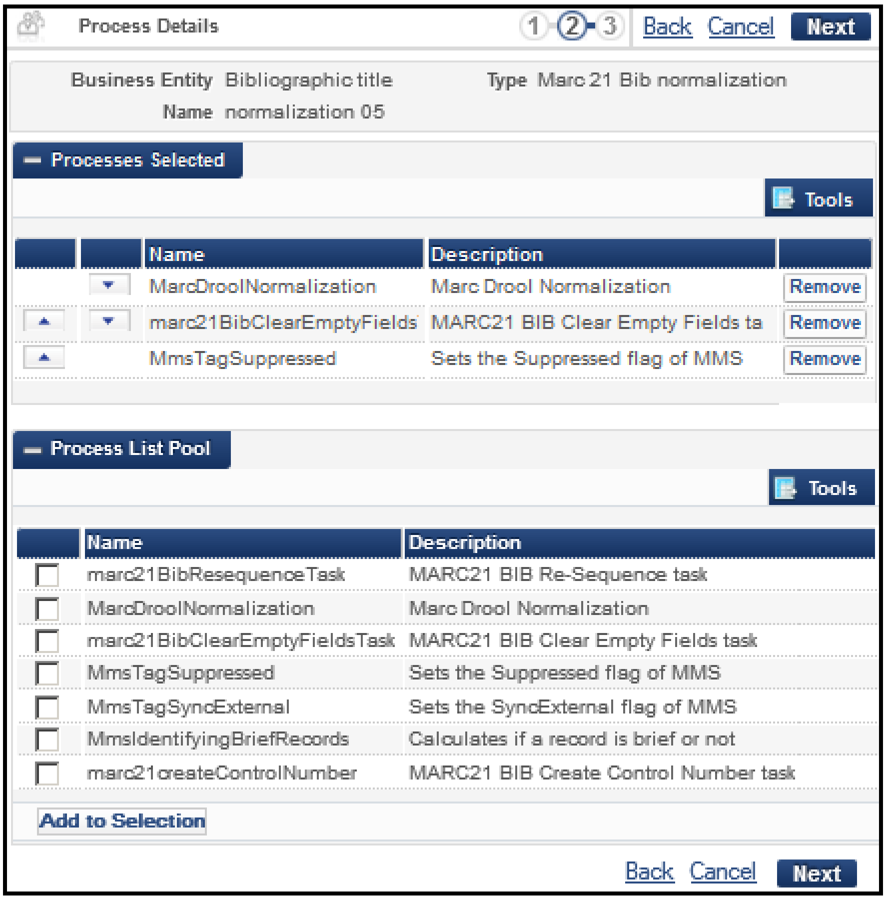


Figure 512: Process Details Page, Processes Selected

4 In the **Process List Pool** area, select one or more processes and click **Add to Selection**. The following table describes the available processes:

Table 80. Normalization Processes

Process Name	Description
MarcDroolNormalization	Runs the normalization rules that are selected as parameters in the Task Parameters tab
Marc21BibResequenceTask	Runs a task that resequences the bibliographic fields according to their proper order—for example, 001, 100, 200, and so forth
Marc21BibClearEmptyFieldsTask	Runs a task that deletes the bibliographic fields that are empty

Table 80. Normalization Processes

Process Name	Description
MmsTagSuppressed	Runs a task that suppresses/unsuppresses the bibliographic records from discovery according to the selected value (True/False) in the Task Parameters tab
MmsTagSyncExternal	Runs a task that sets the synchronization policy for the bibliographic records with the external catalog according to the selected value in the Task Parameters tab
MmsIdentifyingBriefRecords	Runs a task that checks whether the bibliographic records should be set as brief records
Marc21createControlNumber	Runs a task that creates a new control number from the bibliographic records' 001 and 003 fields and places it in the 035 field
MmsTagSyncNationalCatalog	Runs a task that sets the synchronization policy for the bibliographic records with the national catalog according to the selected value in the Task Parameters tab
Marc21HoldingClearEmptyFieldsTask	Runs a task that deletes the holdings fields that are empty
Marc21HoldingResequenceTask	Runs a task that resequences the holdings fields according to their proper order
852 field normalization	Runs a task that takes the control number from the bibliographic record and places it in the correct subfield in the holdings record
Marc21ExpandHoldingBy86XTask	Runs a task that adds a description to the holdings record (in another 86X field)
Marc21AuthClearEmptyFieldsTask	Runs a task that deletes the authority fields that are empty
Marc21AuthResequenceTask	Runs a task that resequences the authority record fields according to their proper order
DcBibClearEmptyFieldsTask	Runs a task that deletes the Dublin Core fields that are empty
DcBibResequenceTask	Runs a task that resequences the Dublin Core fields according to their proper order

5 Use the up and down arrows to arrange the order in which the tasks will be performed as part of the routine.

6 Click **Next**. The next page of the wizard opens.

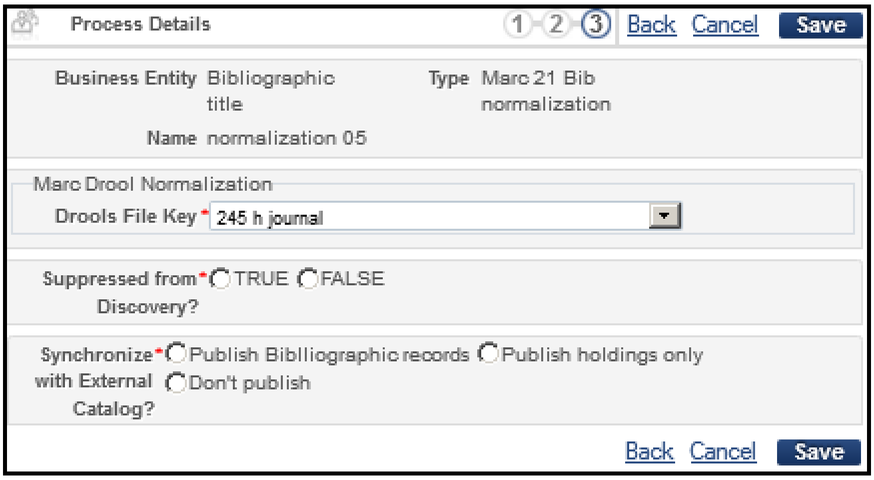


Figure 513: Task Parameters Tab for Normalization Process

NOTE:
Depending on the processes you selected on page 2 of the wizard, you may see none or all of the selections that you see here.

7 For **Marc Drool Normalization**, select a normalization rule from the drop-down menu. For more information regarding working with and creating normalization rules, refer to **Working with Normalization Rules** on page **220** and **Normalization Rules – Syntax and Examples** on page **224**.

NOTE:
Only normalization rules that are created as shared rules in the MD Editor are displayed in the drop-down list to be selected.

8 For the **Suppression from Discovery** field, select **True** for records to be suppressed from publishing to Primo, **False** to allow records to be published to Primo.

9 For the **Synchronize with External Catalog** field, select one of the following:

- **Publish bibliographic records**: marks bibliographic records to be included in exports to OCLC
- **Publish holdings only**: marks holdings records to be included in exports to OCLC
- **Don’t publish**: marks records to be excluded from exports to OCLC

10 Click **Save**. The process is added to the profile in the Alma system.

Editing Validation Routines

There are two out-of-the-box validation routines:

- MARC21 Bib match validation – defines the way in which validation is handled when a bibliographic record match is performed during the import process or in the MD Editor
- MARC21 Bib validation on save – defines the way in which validation is handled when importing MARC records using an import profile, copy cataloging via an external resource (such as WorldCat or LoC), and saving a bibliographic record in the MD Editor.

You can edit these routines, but you cannot create new validation routines.

If the routine is not currently required but may be required in the future, you can disable it by clicking the yellow check mark to the left of the routine. The check mark becomes gray to indicate that the routine is disabled. (To re-enable a routine, click the gray check mark.)

To edit a validation routine:

1 In the Profile Details page's **Validation Processes** tab (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration > [profile name]) > Validation**), select **Edit** for the routine that you want to edit.

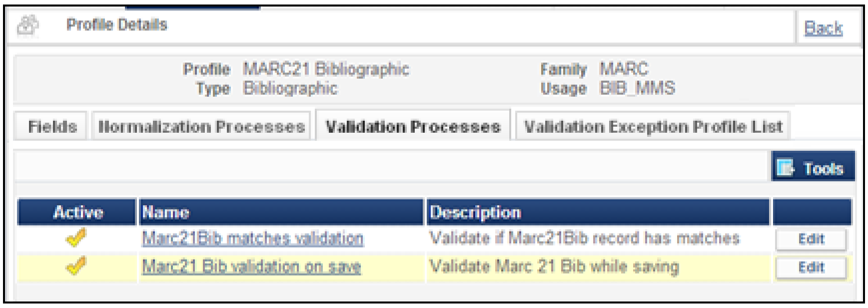


Figure 514: Validation Processes Tab

The Process Details page opens to the General Information tab.

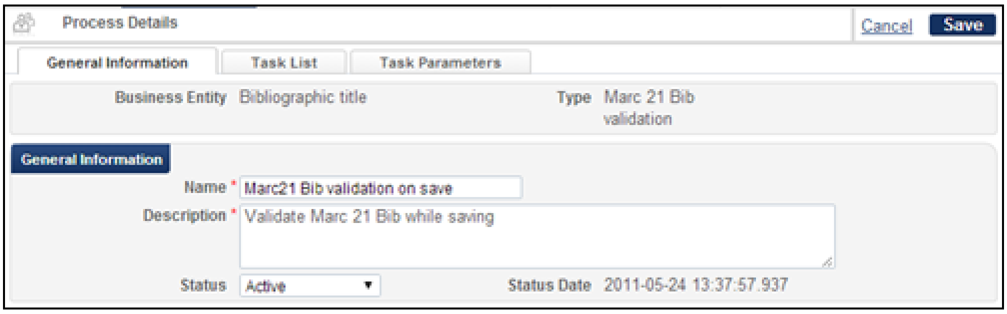


Figure 515: Process Details Page, General Information Tab

2 Edit the validation details as required, selecting the tabs to access the information you want to modify.

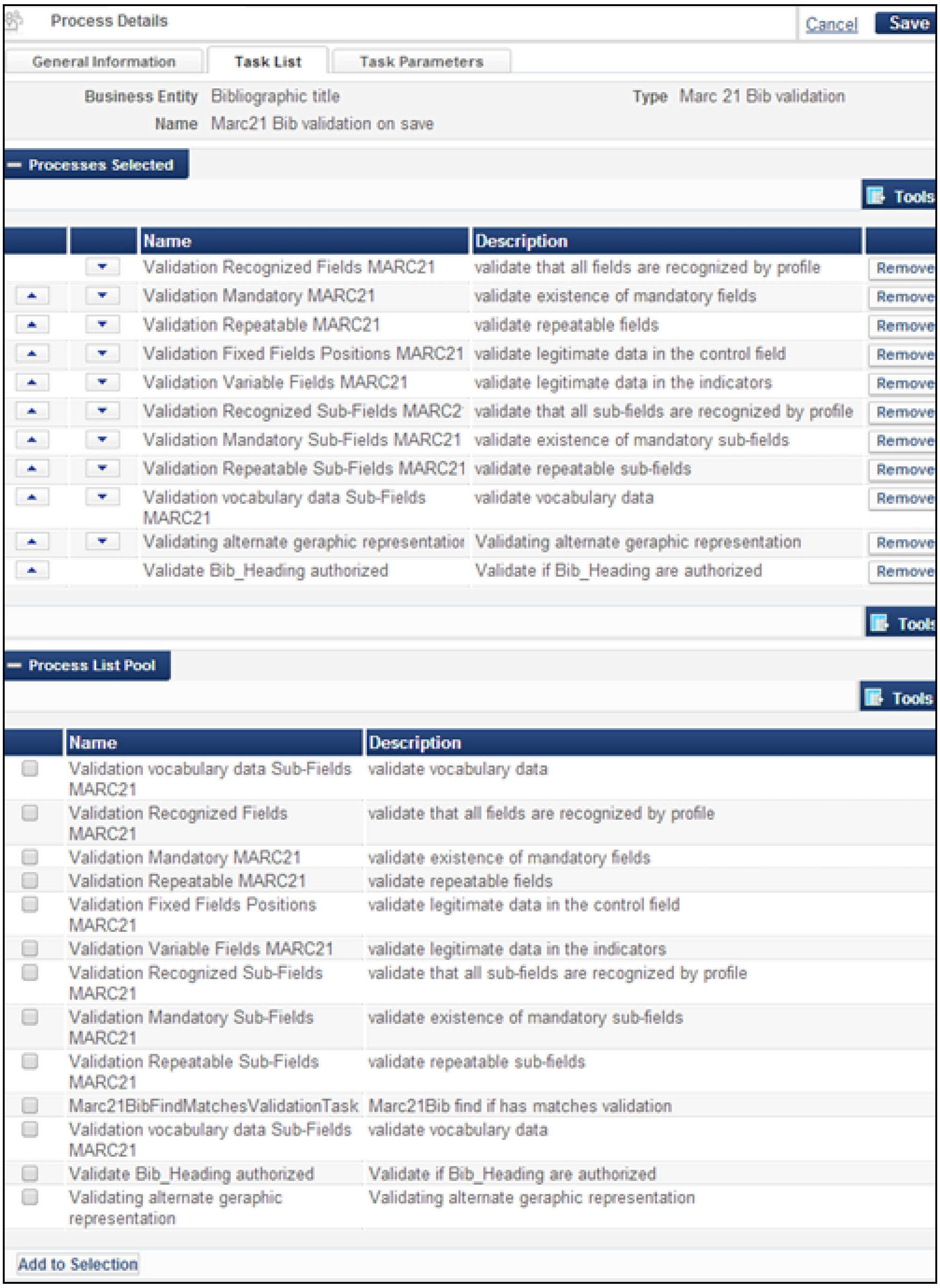


Figure 516: Task List Tab for a Validation Routine

3 Click **Save**. The validation routine is saved in the Alma system.

Working with Validation Exception Profiles

The Validation Exception Profile List tab (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration > [profile name]) > Validation Exception Profile List**) displays the validation exception profiles that are used to determine the severity of the validation issues that are identified using the validation profiles (see **Editing Validation Routines**).

There are two out-of-the-box validation exception profiles:

- MARC XML Bib Import
- MARC XML Bib Metadata Editing on Save

The MARC XML Bib Metadata Editing on Save exception profile is used when copy cataloging via an external resource (such as WorldCat or LoC) and when saving a bibliographic record in the MD Editor. When defining an import profile, you define the validation exception profile to be used during the import. It is recommended that you select the MARC XML Bib Import exception profile to handle invalid data as it is being imported.

Unlike validation profiles, you can define additional exception (severity) profiles. You can also edit the existing profiles or delete them (**Actions > Delete**).

NOTE:

For information on configuring an error message to be displayed when adding 9XX fields to Network Zone records, see **Configuring an Error Message to Be Displayed When Manually Adding 9XX Fields to Network Zone Records** in the *Working with Collaborative Networks (Consortia) in Alma Guide*.

To add a severity validation profile:

1. On the Profile Details page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration > [profile name]**), click the **Validation Exception Profile List** tab.

NOTE:

If you want to create a copy of an existing Validation Exception Profile List, select **Actions > Copy**. Once you have copied the Validation Exception Profile List, you can modify it as needed.

Figure 517: Add Severity Validation Profile Area

2 In the **Add Severity Validation Profile** area, do the following:

- Enter a name (required) and description for the severity validation profile you want to add.
- In the **Default Severity** field, select the type of severity, an error or a warning.

3 Click **Add Severity Validation Profile.** The profile is added to the list of Validation Exception Profiles.

To edit a severity validation profile:

1 On the Profile Details Page, in the **Validation Exception Profile List** tab, select **Actions > Edit** for the validation exception that you want to update.

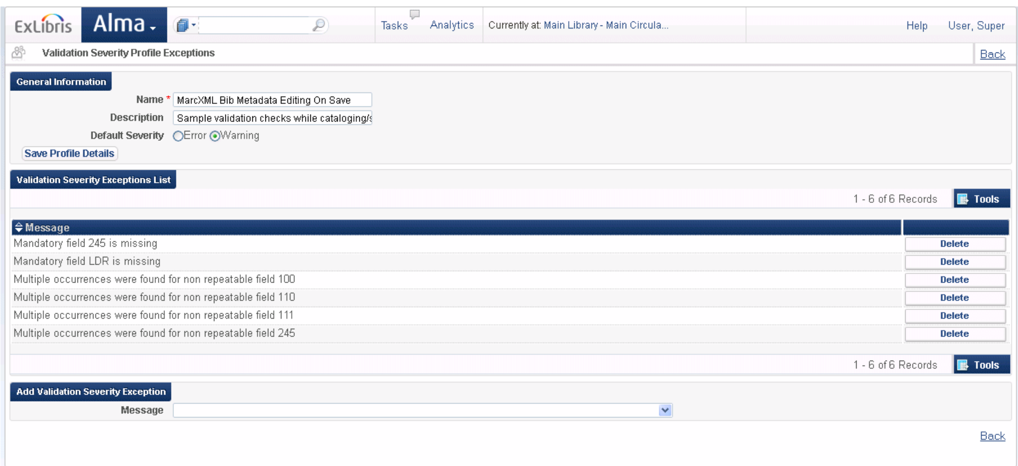


Figure 518: Validation Severity Profile Exceptions Page Edit

2 In the **General Information** area, make changes to name, description, or default severity as required. The default severity determines whether violations of the field-level parameters defined in the **Fields** tab (for example, mandatory, non-repeatable) are treated as warnings (which can be overridden) or as errors (which must be resolved).

3 In the **Message** area, select a message to be deleted, as required, and click **Delete**.

4 The **Add Validation Severity Exception** area allows configuration of new validation exceptions. In the **Message** drop-down list, select a validation exception message. The syntax of the message is not configurable.

5 Click **Save**. The validation exception profile is saved in the Alma system.

Configuring Controlled Vocabulary Registry

PERMISSIONS:

To configure the controlled vocabulary registry, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Alma supports validation of subfield values based on a controlled vocabulary (a list of acceptable values for that subfield). To implement a controlled vocabulary (CV), you need to:

1 Create a controlled vocabulary

2 Assign the controlled vocabulary to a specific MARC 21 subfield

Refer to the procedure in **Editing Fields** on page **638** and the steps that describe editing field options.

You configure controlled vocabularies (CVs) from the Metadata Configuration List page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **Controlled Vocabulary Registry** from the **Cataloging** section on the Configuration page.

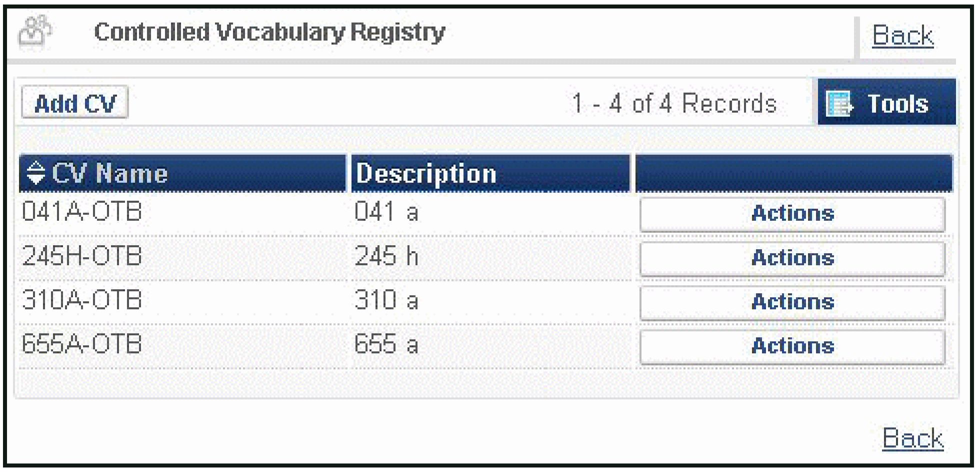


Figure 519: Controlled Vocabulary Registry Page

You can perform the following actions on this page:

- View the controlled vocabulary details (**Actions > View**)
- Add a controlled vocabulary (see **Adding a Controlled Vocabulary** on page 655)
- Delete a controlled vocabulary (**Actions > Customize**, then click **Delete** on the Controlled Vocabulary Details page)

Adding a Controlled Vocabulary

You can add a new controlled vocabulary.

To add a controlled vocabulary:

1 On the Controlled Vocabulary Registry page (**Resource Configuration > Configuration Menu > Cataloging section > Controlled Vocabulary**

Registry), click the **Add CV** button. The Controlled Vocabulary Details page opens.

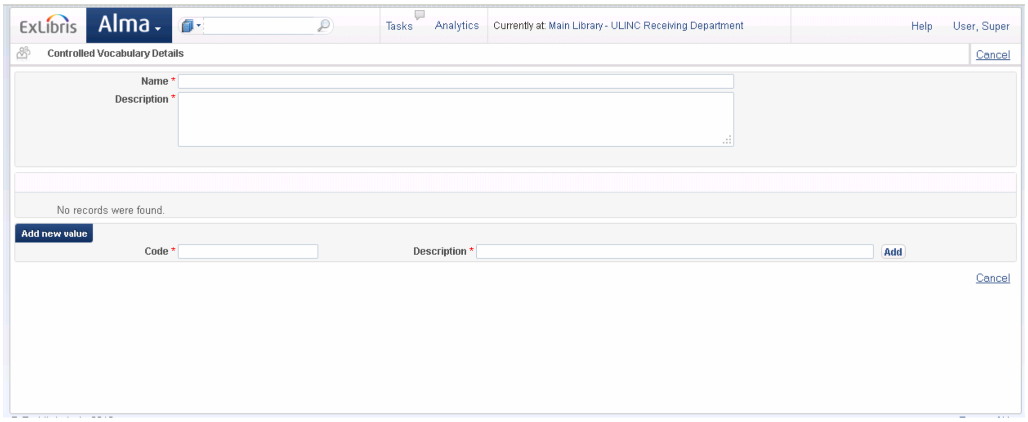


Figure 520: Controlled Vocabulary Details Page

2 Specify a name and enter a description.

This name and description displays on the Controlled Vocabulary Registry page and in the drop-down list of options for **Choose Controlled Vocabulary** when you assign a CV to a MARC 21 subfield.

3 In the **Add new value** area, specify a code and enter a description.

The code that you enter is the term that is validated or provided as an option when entering a record in the Metadata Editor.

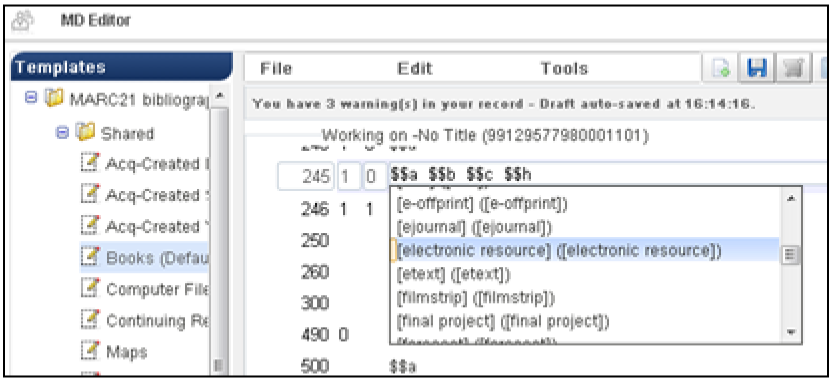


Figure 521: 245 $h CV Example

In the 245 $h example above, the codes that you enter display first in each row, and the description displays to the right of each code in parentheses.

The description for the code that you enter in the CV registry can provide additional information regarding the term that you entered.

4 Click **Add**. The controlled vocabulary name is added to the list of controlled vocabulary registries.

5 Repeat steps 3 and 4 to add any additional codes (terms).

6 Click **Cancel** to return to the Controlled Vocabulary Registry page. The controlled vocabulary registry records are saved in the Alma system.

Record Export

This section describes:

- **Configuring Publishing Profiles** on page **657**
- **Configuring RSS in Alma** on page **658**
- **Configuring Exclude Process Types from Publishing** on page **670**
- **Extracting Electronic Portfolio URLs** on page **671**

Configuring Publishing Profiles

PERMISSIONS:

To configure publishing profiles, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Alma lets you configure publishing profiles for RSS feeds, Primo, Primo Central, Google Scholar, OCLC, COPAC, Libraries Australia, and PubMed.

You can configure publishing profiles from the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu**, then select **Publishing Profiles** from the Configuration page, **Record Export** section).

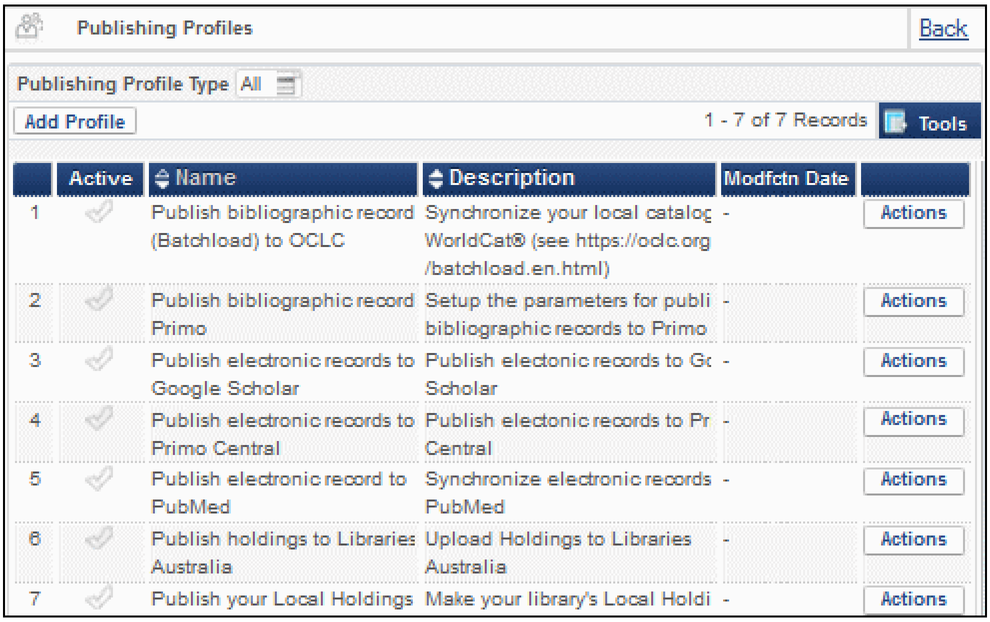


Figure 522: Publishing Profiles Page

NOTE:

Publishing profiles are now available for configuration during the Alma implementation process.

For information on configuring an RSS profile, refer to **Configuring RSS in Alma** on page **658**.

For information on configuring the other types of publishing profiles, refer to **Resource Management** in the *Alma Integrations with External Systems Guide*.

Configuring RSS in Alma

PERMISSIONS:

To set up an RSS feed, you must have one of the following roles:

- General System Administrator
- Repository Administrator
- Catalog Administrator

The RSS (Rich Site Summary, www.whatisrss.com) feature in Alma provides a feed to the discovery interface (Primo), identifying new items published or added to the inventory. This feature enables you to create a new book list (refer to the **New Book List Workflow** on page **659**).

The library items to be included in the RSS are determined by set management selections and by the relative date spans set up in the RSS publishing profile.

Alma uses `ItemToRSSNormalizer` to normalize records for RSS files.

IMPORTANT:

Internet Explorer fully supports RSS. Firefox offers some support, and Chrome does not support RSS at all. To use RSS with a browser other than IE, consult the help for that browser to find an add-on or work-around.

VIDEO:

See *Configuring RSS Feeds for New Book Lists* for an "Ask the Expert" session on this functionality (40 mins).

New Book List Workflow

Creating a new book list, by utilizing the Alma RSS feature, involves the following key workflow steps:

- Create a physical items set (refer to **Saving Queries** on page **32**)

  Use this step to identify the set of records within which you expect to locate your list of new books. You will need to specify the name of this set in the RSS publishing profile that you create in a later part of the workflow.

- Create the RSS discovery URL (refer to **Creating the RSS Discovery URL** on page **663**)

  After you have identified all the parts and created the RSS discovery URL that you need to use for your new book list process, you need to enter the URL in the `rss_discovery_url` parameter that is located on the **Mapping Table** page of **Other Settings** (**Administration > General Configuration > Configuration Menu > General Configuration section**).

- Create an RSS publishing profile (refer to **Configuring an RSS Publishing Profile** on page **660**)
- Create the RSS feed URL (refer to **Creating the RSS Feed URL** on page **667**)
- Optionally, confirm that new books have been added/received to your database (within the set that you previously saved above)
- Confirm that the RSS publishing profile has successfully completed processing by using **Monitor Jobs** (**Administration > Manage Jobs**) and checking the **Completed** tab (filter on **Publishing**)

  For more information refer to **Monitoring Jobs** on page **286** in the *Alma Administration Guide*.

- Use the RSS feed URL (created above) to view the new book list by entering the URL into a browser and viewing the results in Primo. Refer to **RSS Feed Job Processing** on page **668**.

Configuring an RSS Publishing Profile

To implement RSS, an authorized user must:

- Configure a publishing profile that includes a definition of new that is between 90 and 2 days ago (refer to the **Max number of days ago** and **Min number of days ago** settings described in the procedure below related to the definition of new)
- Create and/or select a physical item set to be used with the RSS publishing profile
- Define a new customer parameter, `rss_discovery_url` (**Administration > General Configuration > Configuration Menu > General Configuration > Other Settings**), that links to Primo at the institution level. Refer to **Creating the RSS Discovery URL** on page **663**.

The RSS feed can then be run (see **RSS Feed Job Processing** on page **668**).

NOTE:
Alma's RSS feed pertains to physical items only.

To configure the RSS feed:

1. From the Configuration page of the Resource Management component (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** in the Record Export section. The Publishing Profiles page opens, listing all preconfigured publishing profiles.
2. Click the **Add Profile** button, and select the **RSS** option. The Publishing Profile Details page opens to a blank RSS profile.

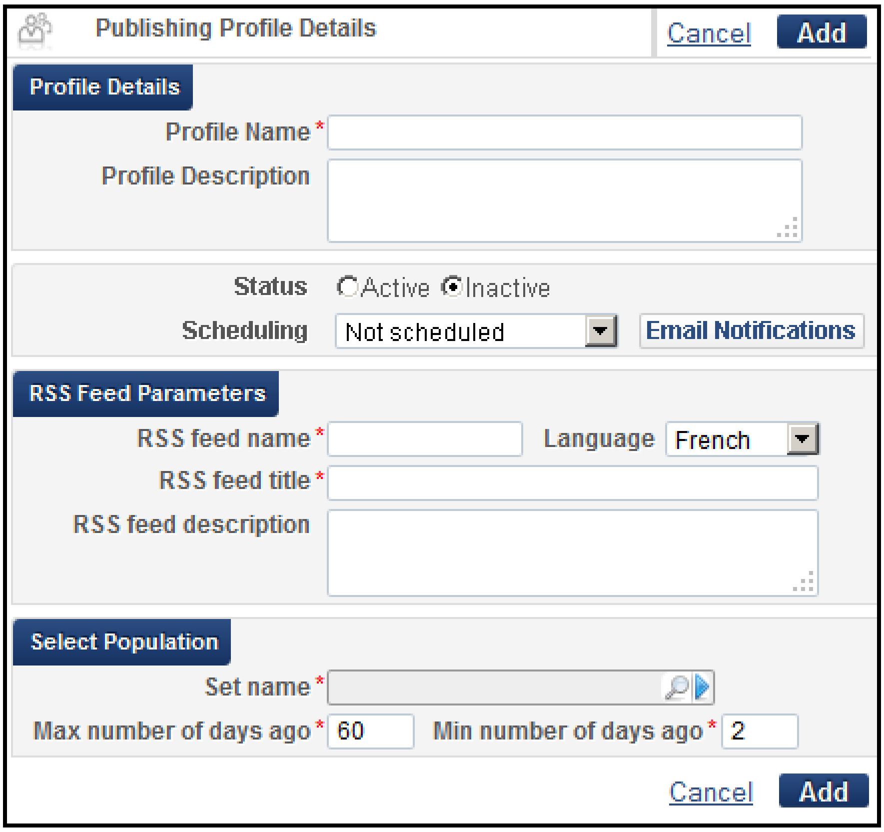


Figure 523: Publishing Profile Details for RSS

3 Configure the RSS publishing profile using the table below that describes your options.

Table 81. RSS Publishing Profile

Field	Description
Profile Details	
Profile name	The unique name of this RSS feed publishing profile. Used to identify the profile on the list of Publishing Profiles page.
Profile description	Provides more information about the profile and displays it on the Publishing Profiles page as well.
Status	Determines whether the status is: ■ Active (yellow check mark), meaning it is in use or can be used, or ■ Inactive (clear check mark), meaning it is unable to be used at present.

Table 81. RSS Publishing Profile

Field	Description
Scheduling	Select a time or interval from the drop-down menu to identify when you want publishing to be run that uses this profile.
Email Notifications	Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.
RSS Feed Parameters	
RSS feed name	The name used to generate the link to the feed. Avoid spaces in the name.
RSS feed title	Displays as the name of the profile in the Publishing Profiles list. This also displays in the RSS feed results.
RSS feed description	A description of the profile that displays in the Publishing Profiles list. This also displays in the RSS feed results.
Language	A drop-down list from the languages code table. Default is empty. Once a value has been selected, it becomes the default on subsequent uses of the profile.
Select Population	
Set name	The set of physical items that the RSS action will be applied to. Click the arrow to open a list of physical item sets to browse or search, then select one.
Max number of days ago	The maximum number of days past to look for new items for the feed. New is determined by the item's **Receiving date** identified on the Physical Item Editor page. The default number of days is 60. This number cannot exceed 90.
Min number of days ago	The minimum number of days past to look for new items. The default is 2, and two days is the minimum to ensure synchronization with the Primo. This number cannot exceed the **Max number of days ago**.

4 Click the **Save**. The Publishing Profile list page opens with the new RSS feed publishing profile listed.

Creating the RSS Discovery URL

The RSS discovery URL has several component parts. Use the following template to define your RSS discovery URL:

```
http://<primo domain>/primo_library/libweb/action/
dlSearch.do?institution=<institution>&vid=<view>&tab=<tab
code>&indx=1&bulkSize=10&query=any,contains,<value>
```

An example of a functional RSS discovery URL may look something like:

```
http://demo.alma.exlibrisgroup.com:1701/primo_library/
libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
10&query=any,contains,primo_alma@@ALMA_IND@@
```

This template can be divided into the following components some of which you need to locate and other parts that are provided:

1. Primo domain

   ```
   http://demo.alma.exlibrisgroup.com:1701/primo_library/
   libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
   Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
   10&query=any,contains,primo_alma@@ALMA_IND@@
   ```

   This can be obtained from the Primo URL.

2. RSS discovery URL string provided (1)

   ```
   http://demo.alma.exlibrisgroup.com:1701/primo_library/
   libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
   Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
   10&query=any,contains,primo_alma@@ALMA_IND@@
   ```

3. Institution code

   ```
   http://demo.alma.exlibrisgroup.com:1701/primo_library/
   libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
   Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
   10&query=any,contains,primo_alma@@ALMA_IND@@
   ```

   This is the Primo institution code not the Alma institution code. This can be located in the Primo back office by editing the Primo institution (**Primo Home > Ongoing Configuration Wizards > Institution Wizard**). For more information, refer to the *Primo Back Office Guide*.

4. vid (view ID)

   ```
   http://demo.alma.exlibrisgroup.com:1701/primo_library/
   libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
   Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
   10&query=any,contains,primo_alma@@ALMA_IND@@
   ```

   Use the `vid` value that you find in the Primo URL.

5 View tab

http://demo.alma.exlibrisgroup.com:1701/primo_library/
libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
Alma**&tab=default_tab**&search_scope=Alma&indx=1&bulkSize=
10&query=any,contains,primo_alma@@ALMA_IND@@

This is the tab code name (case sensitive) for the desired view in the Primo back office at **Primo Home > Ongoing Configuration Wizards > Views Wizard** as shown below. For more information, refer to the *Primo Back Office Guide*.

Figure 524: Primo Tab Code

6 Scope name within the selected tab

http://demo.alma.exlibrisgroup.com:1701/primo_library/
libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
Alma&tab=default_tab**&search_scope=Alma**&indx=1&bulkSize=
10&query=any,contains,primo_alma@@ALMA_IND@@

You identify the scope name to be used from the ones defined in the Primo back office for the view tab you identified in the previous component. For more information, refer to the *Primo Back Office Guide*.

Scopes for default_tab Tab

No.	scope Name
1	Alma_PC
2	Alma
3	PC
4	Alma_Consortium

Figure 525: Scope Name (Primo Back Office)

7 RSS discovery URL string provided (2)

```
http://demo.alma.exlibrisgroup.com:1701/primo_library/
libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
10&query=any,contains,primo_alma@@ALMA_IND@@
```

8 sourceid

```
http://demo.alma.exlibrisgroup.com:1701/primo_library/
libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
10&query=any,contains,primo_alma@@ALMA_IND@@
```

The `sourceid` can be found in the Primo back office **Data Sources Configuration** (**Primo Home > Ongoing Configuration Wizards > Pipe Configuration Wizard >Data Sources Configuration**) or by viewing the `<sourceid>` in a Primo PNX record. For more information, refer to the *Primo Back Office Guide*.

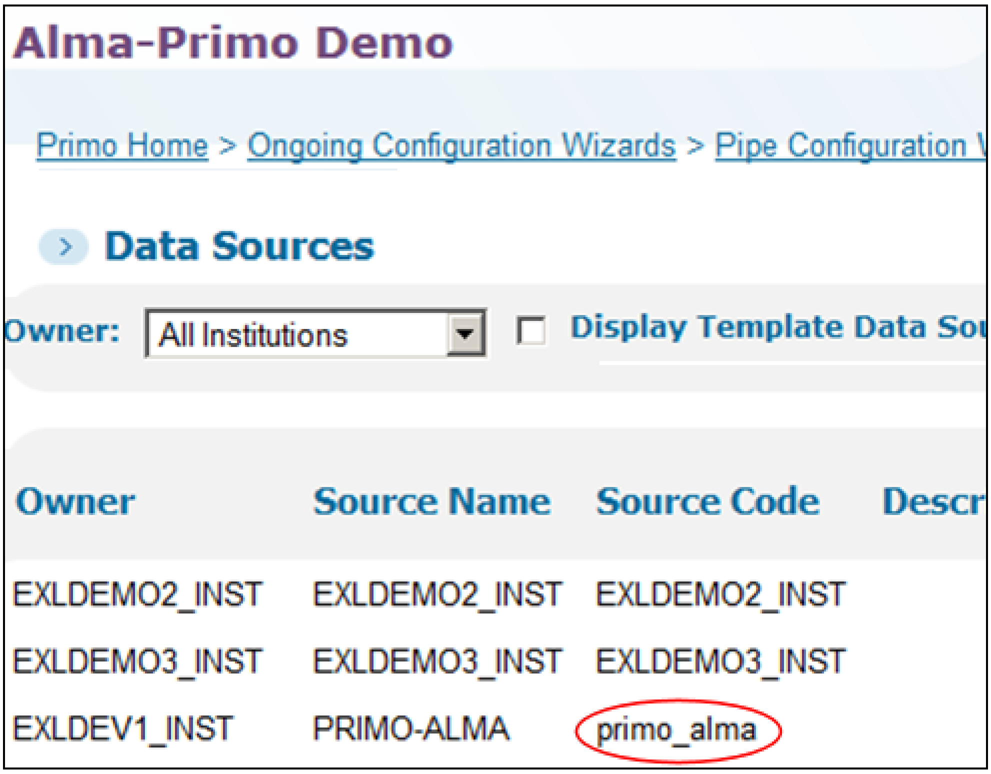


Figure 526: Primo sourceid

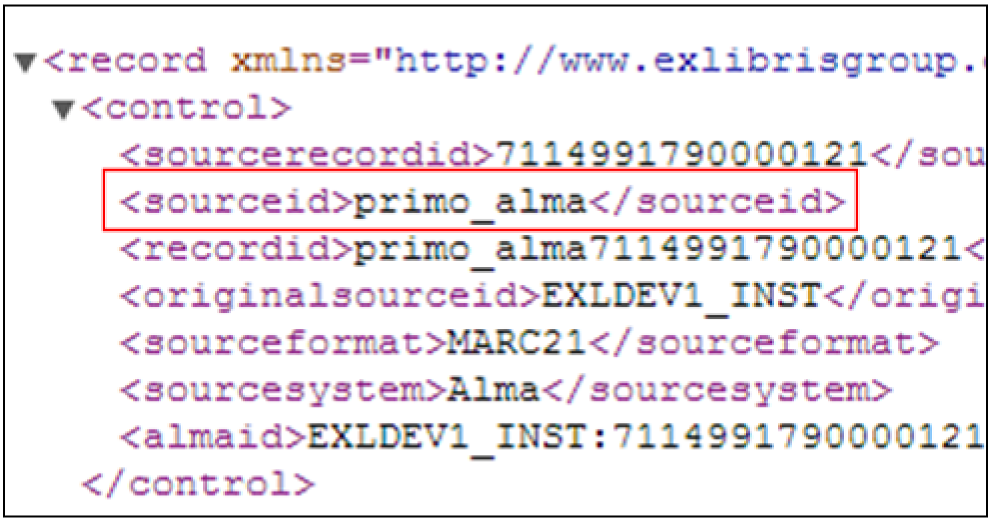


Figure 527: Primo sourceid from a PNX Record

9 RSS discovery URL string provided (3)

```
http://demo.alma.exlibrisgroup.com:1701/primo_library/
libweb/action/dlSearch.do?institution=EXLDEV1_INST&vid=
Alma&tab=default_tab&search_scope=Alma&indx=1&bulkSize=
10&query=any,contains,primo_alma@@ALMA_IND@@
```

Once you have defined your RSS discovery URL, you can enter it in the `rss_discovery_url` parameter that is located on the **Mapping Table** page of **Other Settings** (**Administration > General Configuration > Configuration Menu > General Configuration section**).

Creating the RSS Feed URL

The RSS feed URL is used to retrieve the records in the RSS feed. After each time that the RSS publishing job is run, the RSS feed includes records in the results with items that have a receiving date that meets the criteria for **minimum/ maximum number of days ago** that you set in the RSS publishing profile. These records make up the list of new books for your new book list. Patrons may sign up for the RSS feed or a link to the RSS feed URL may be placed in Primo or on another library web page.

The following is an example of an RSS feed URL:

```
http://demo.alma.exlibrisgroup.com:1801/rep/
getFile?institution_code=EXLDEV1_INST&file=
library_science_RSS_name&type=RSS
```

The RSS feed URL is made up of the following component parts (using the example above):

1 Alma URL

```
http://demo.alma.exlibrisgroup.com:1801
```

2 RSS feed URL string provided (1)

```
/rep/getFile?institution_code=
```

3 Alma institution code

```
EXLDEV1_INST
```

4 RSS feed URL string provided (2)

```
&file=
```

5 RSS feed name as defined in the RSS publishing profile

`library_science_RSS_name`

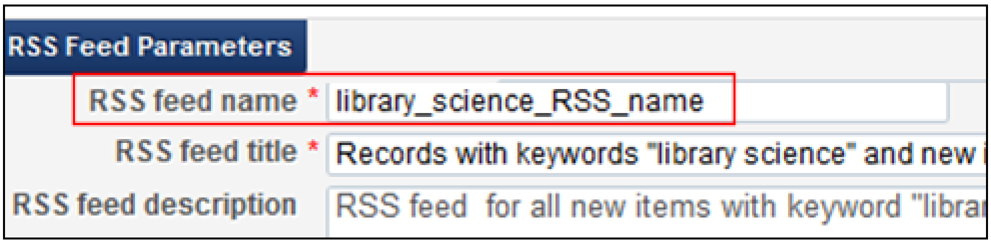


Figure 528: RSS Feed Name from the RSS Publishing Profile

6 RSS feed URL string provided (3)

`&type=RSS`

RSS Feed Job Processing

After you have completed the RSS feed publishing profile, the RSS feed job is run per the schedule you defined in the profile. To view the progress of the job, find it using the **Publishing** filter on the Monitor Jobs page in the **Running** or **Completed** tab (**Administration > Manage Jobs > Monitor Jobs**) or select **Actions > History** for the RSS profile on the Publishing Profile page to display the results on the Monitor Jobs page.

For completed jobs, selection Actions > Report to open the Job Report page. In addition to the files created as a result of the RSS feed job being run, Alma generates a summary link (displayed on the Job Report page) for each RSS job in the following format:

```
http://[Alma URL]/rep/getFile?institution_code=[Alma Institution
Code]&file=[RSS feed name]&type=RSS
```

This is the same URL format as described in **Creating the RSS Feed URL** on page 667. To display the results of the RSS feed publishing profile, that is, the new book list, you can click the link provided on the Job Report page; or you can copy/paste the RSS feed URL that you created in the section **Creating the RSS Feed URL** on page 667 into a browser (refer to the figure below).

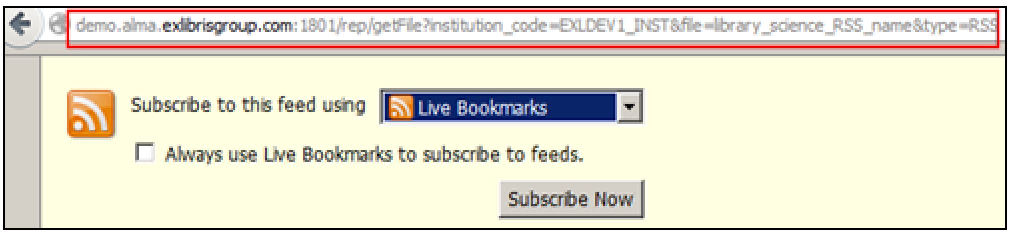


Figure 529: RSS Feed URL Entered into a Browser

Either method opens a page similar in format to the figure below that contains a list of items matching the date span criteria that you provided in the publishing profile. This is your new books list.

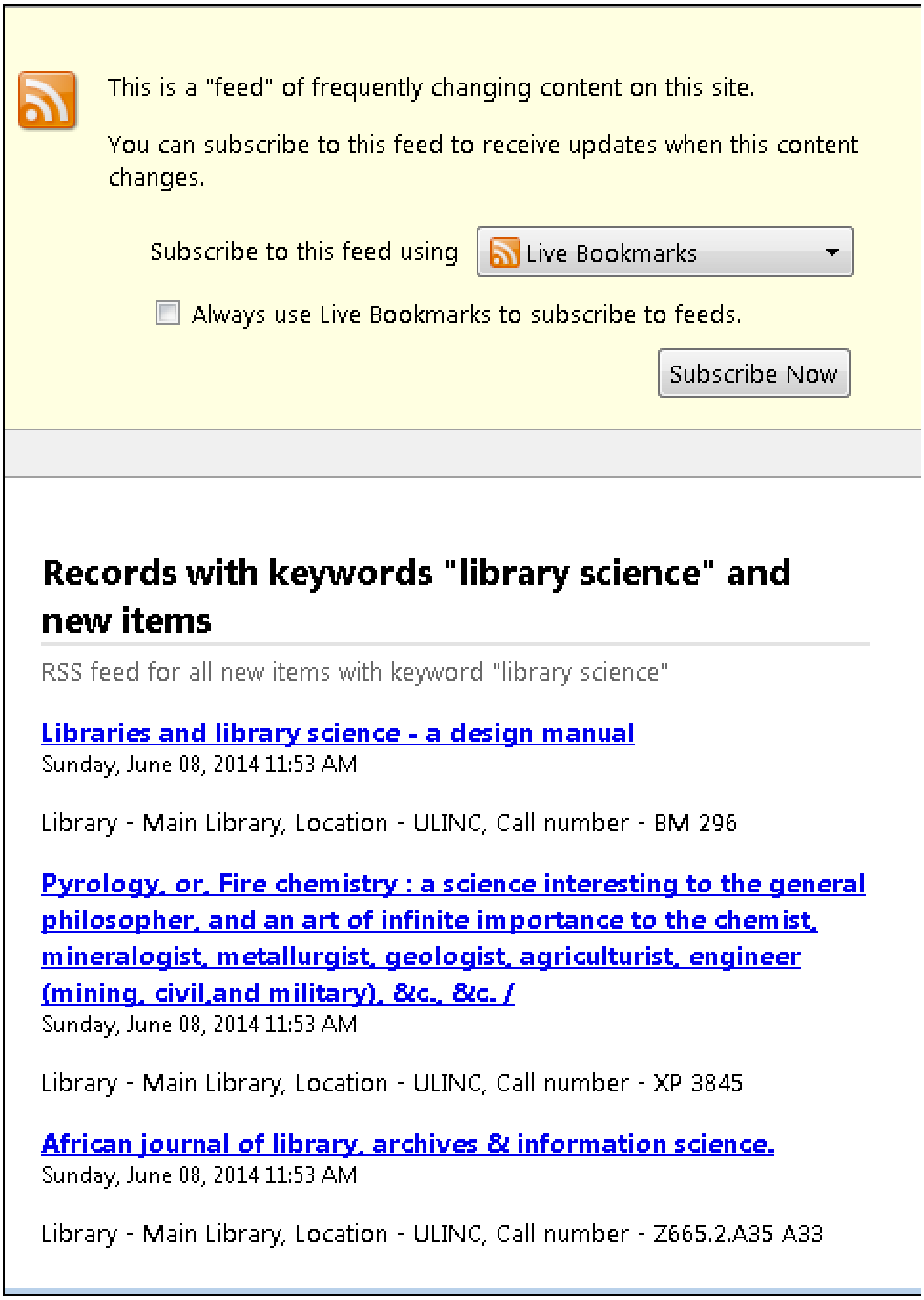


Figure 530: RSS Feed Results/New Books List

When you click the link for one of the records in the RSS feed results list (the new books list), the item opens in your discovery tool/Primo as shown in the figure below.

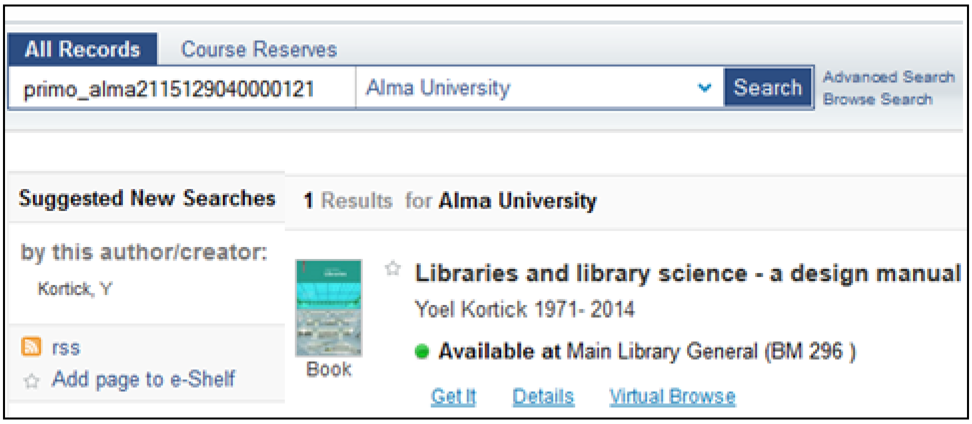


Figure 531: New Item Displayed in Primo

Configuring Exclude Process Types from Publishing

You configure exclude process types from publishing from the Mapping Table page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **Exclude Process Types from Publishing** from the **Record Export** section on the Configuration page.

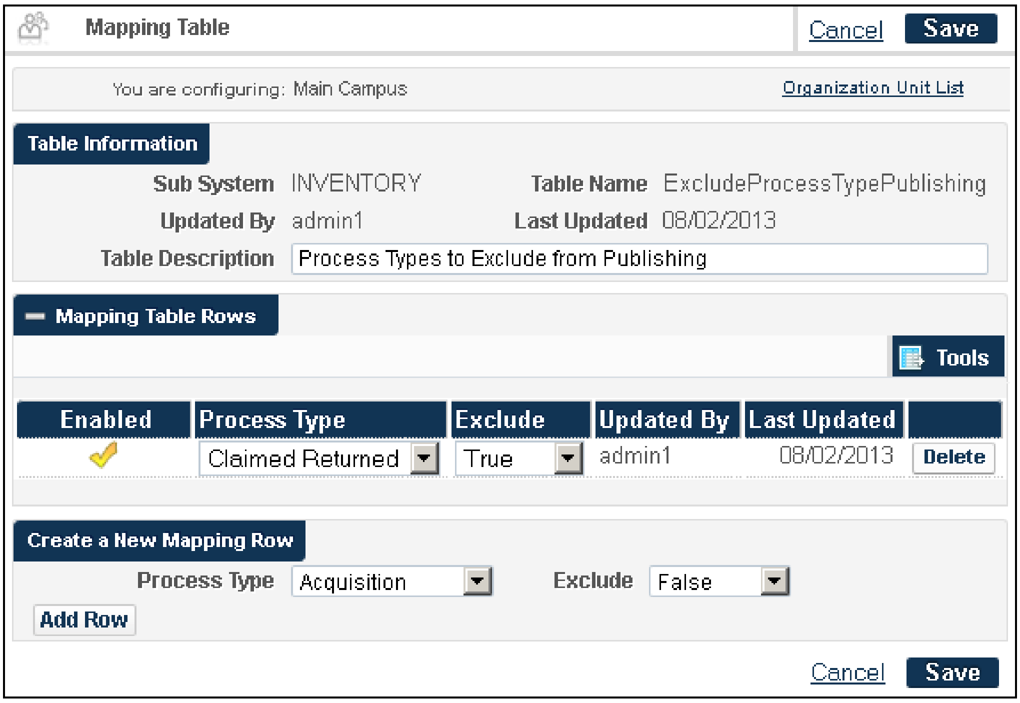


Figure 532: Exclude Process Types from Publishing

NOTE:

It is not possible to create new process types.

For information on configuring exclude process types from publishing, see **Excluding Process Types from Publishing** in the *Alma-Primo Integration Guide*.

Extracting Electronic Portfolio URLs

PERMISSIONS:

To extract electronic portfolio URLs, you must have one of the following roles:

- Inventory Operator
- General System Administrator

The Export URLs option provides a method for extracting electronic portfolio URLs from Alma for synchronizing with a proxy server. With this utility, you can run a job to extract all electronic portfolio URLs or a logical set of URLs. The utility extracts the portion of the URL up to the query string, as in the bolded portion of the example below:

`http://www.yahoo.com/articles``?artid=1234`

To extract electronic portfolio URLs:

1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Export URLs** in the Record Export section. The Export Electronic Resource URLs page opens.

Figure 533: Export Electronic Resource URLs Page

2 Specify one of the following options from the Input URLs drop-down list:

a **All** and skip to step 5.

b **Logical Set** and continue with the next step.

Figure 534: Logical Set Option

3 Browse to locate the set that you previously saved (using Repository Search and Save Query).

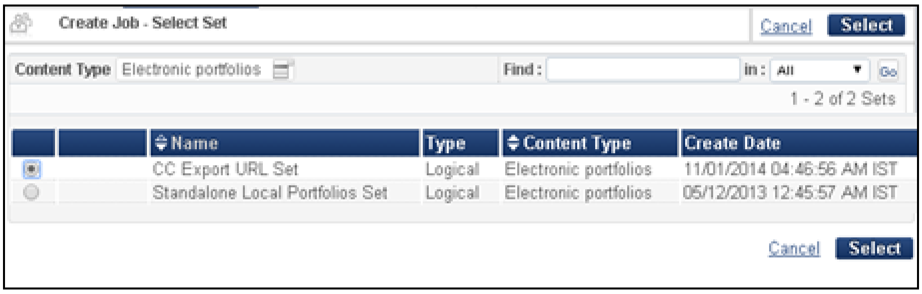


Figure 535: List of Available Sets

4 Click the appropriate radio button for the set you want to use and click **Select**.

Figure 536: Set Selected

5 Click **Save**. A confirmation message displays with the ID number of the job that is being run to extract the URLs.

Figure 537: Confirmation Message with Job ID Number

6 View the job results.

a From the Completed tab on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click **Actions > Report** for the Export Electronic Resource URLs job that you just ran.

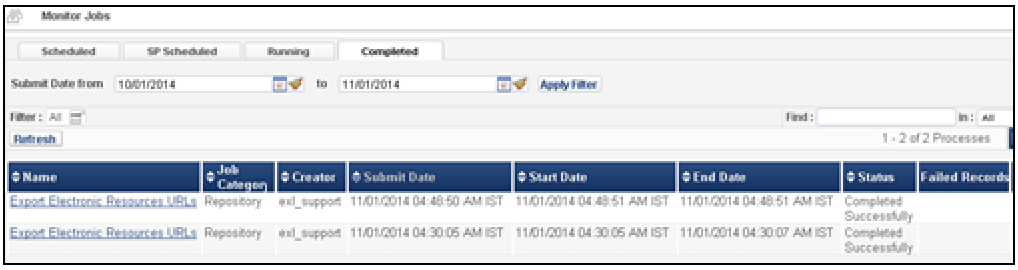


Figure 538: Completed Tab on the Monitor Jobs Page

b On the Job Report page, click the **Link to exported records** link.

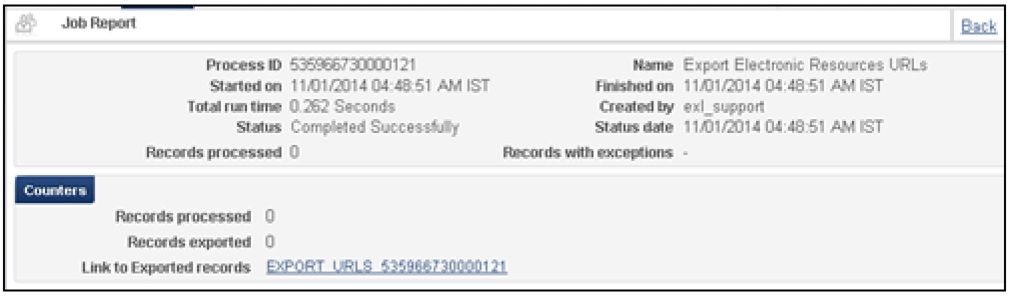


Figure 539: Job Report Page

c Select **Actions > Download**.

d Open the .csv file created that contains the extracted URLs.

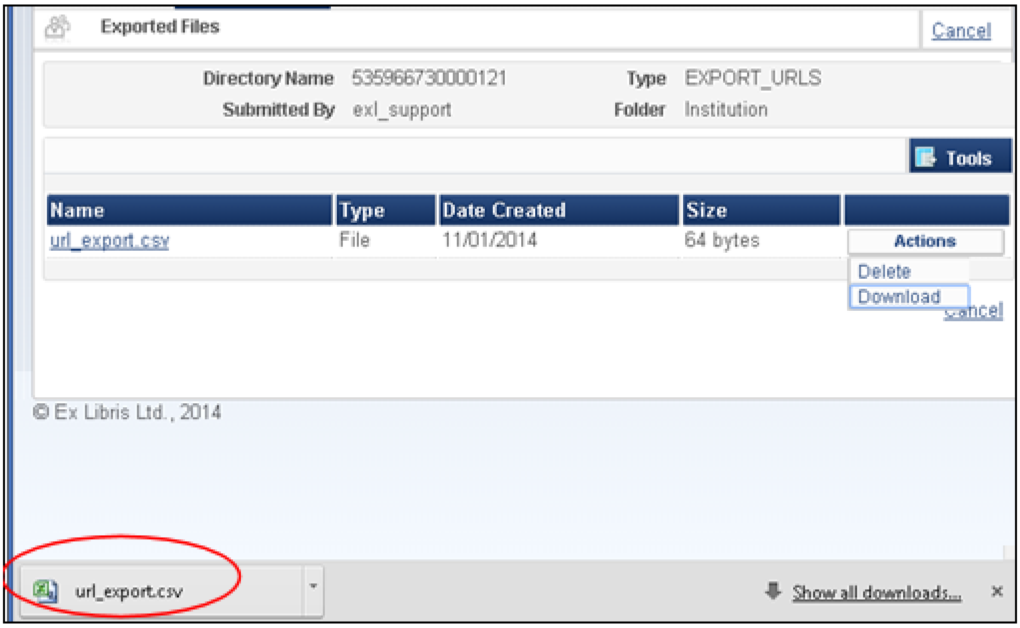


Figure 540: Open the .csv File

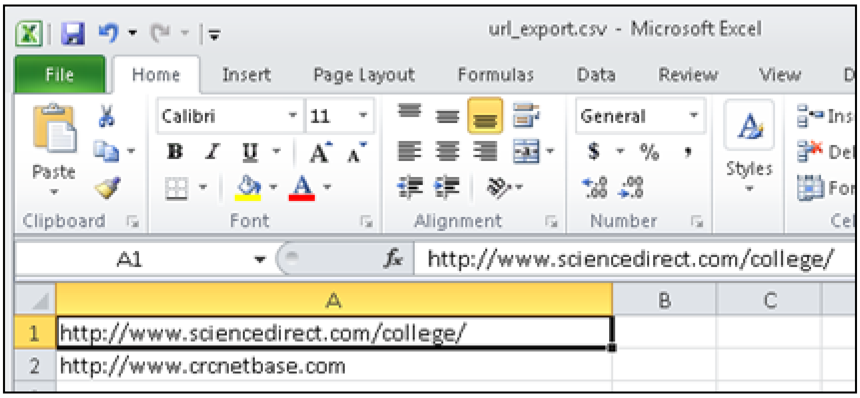


Figure 541: .csv File

Record Import

This section describes:

Configuring Import Profiles

PERMISSIONS:

To configure import profiles, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Import profiles enable you to define how to import metadata and order information into the Alma repository. The definitions include source format, mapping definitions, and normalization routines to be executed during the import process. Profiles are created for each vendor with specific configurations for the purchases that are being processed from that vendor. There could be multiple import profiles for a vendor with specific configurations for a particular purchase type. For example, you would have different import profiles for purchases of material being funded through different funds, or for purchases for different libraries in the institution.

For more information on import profiles see **Managing Profiles for Record Imports** on page **511**.

Configuring Originating Systems for MD Records

PERMISSIONS:

To configure originating systems for MD records, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

You can configure the originating system to be used when creating import profiles (such as WorldCat or Library of Congress). The originating systems that you configure in this section are available in the Originating System drop-down list when creating import profiles. For more information on import profiles, see **About Import Profiles** on page **511**.

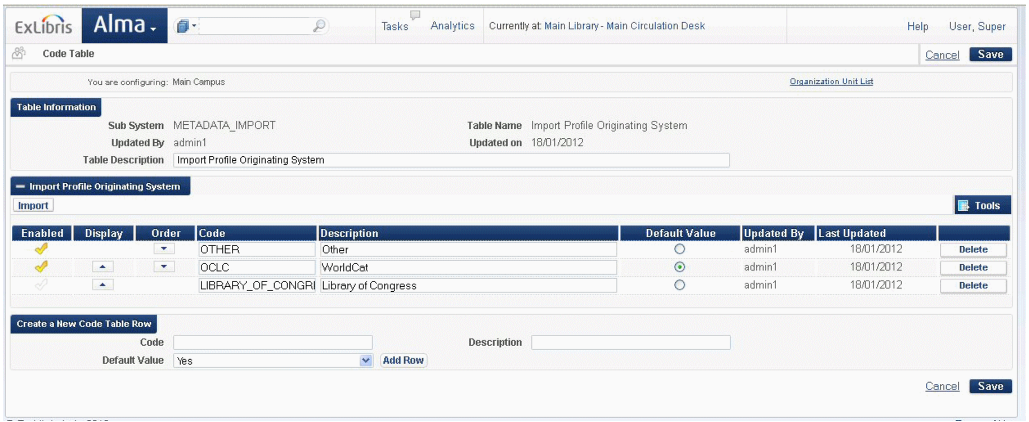


Figure 542: Configuration Files Page - Originating Systems for MD Records

You configure the Originating Systems for MD Records from the Configuration Files page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **Originating Systems for MD Records** from the **Record Import** section on the Configuration page.

This section describes:

- **Viewing Originating Systems for MD Records** on page **677**
- **Adding an Originating System for MD Records Code** on page **677**
- **Editing Originating System for MD Records Codes Details** on page **678**
- **Deleting and Disabling an Originating System for MD Records Code** on page **679**

Viewing Originating Systems for MD Records

The Code Table page displays:

- details about the table that contains the Originating Systems for MD Records codes for the institution. Most of the details are system-generated and cannot be edited.
- a list of the Originating Systems for MD Records codes that are defined for the institution.
- a group of input fields that enable you to define and create a new Originating System for MD Records code.

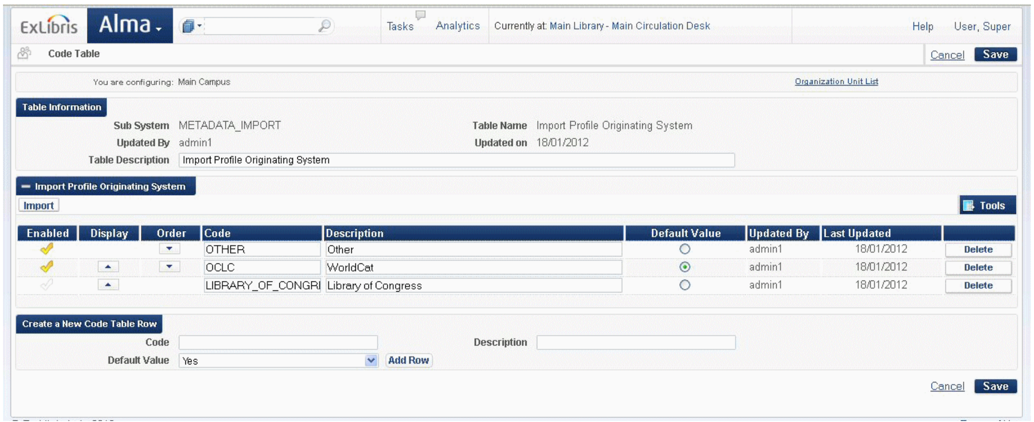


Figure 543: Code Table Page Originating Systems for MD Records Code

Adding an Originating System for MD Records Code

You can add new originating systems for MD records codes to the institution. The originating systems for MD records codes that you add apply to all libraries within the institution.

If you prefer to use the Import option to populate the code table, see **Importing Information to Code Tables** on page **283** *in the Alma Administration Guide* for more information.

To add a new originating systems for MD records code to the institution:

1. On the Code Table page, under **Create New Code Table Row**, enter a code for the new originating system for MD records code.

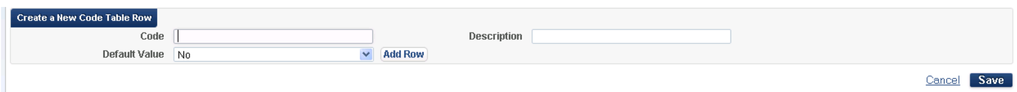


Figure 544: Create New Reporting Code Row Section of the Code Table Page

2 Enter a code and description for the new originating system for MD records code.

3 From the **Default value** drop-down list, select **Yes** if the new originating system for MD records code will be the default reporting originating system for MD records whenever an **Originating Systems for MD Records** drop-down list is displayed.

4 Click the **Add Row** button. The new originating system for MD records code is displayed at the bottom of the list of defined originating systems for MD records. Note that by default, each new originating systems for MD records code is enabled. To disable a reporting code, click the yellow check mark to the left of the originating system for MD records code.

5 Click **Save** to store the new originating system for MD records code details in the system.

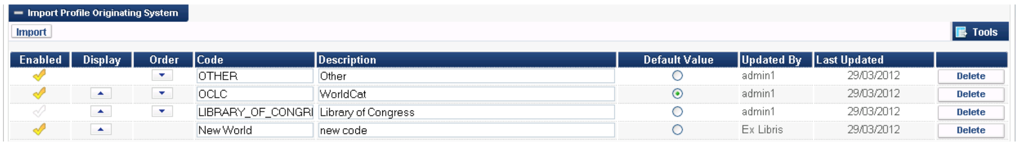


Figure 545: Code Table Page Originating System for MD Records Code

The originating system is displayed in the Originating System drop-down list when creating import profiles.

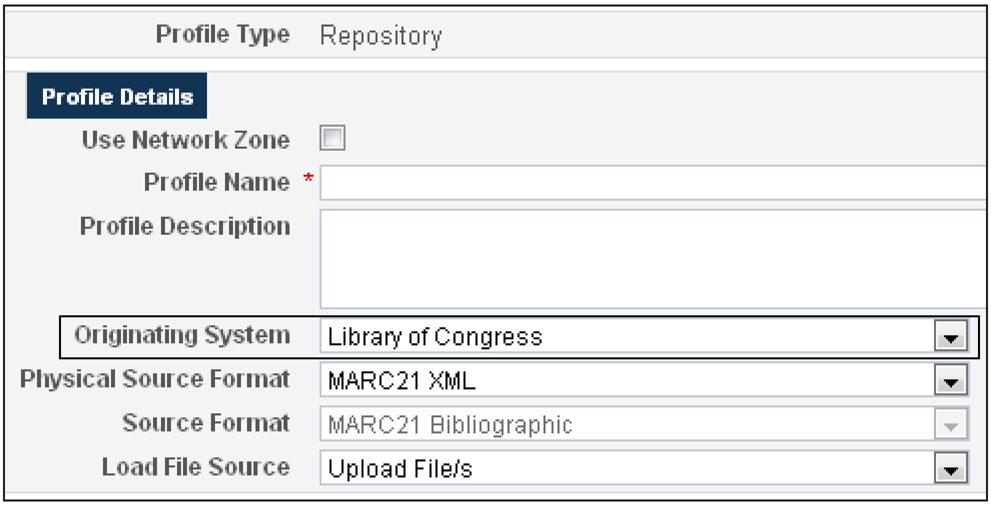


Figure 546: Originating System Drop-Down List

Editing Originating System for MD Records Codes Details

You can edit the details of any originating system for MD records code.

To edit the details of an originating system for MD records code:

1 On the Code Table page, under **Code**, locate the originating system for MD records code that you want to edit.

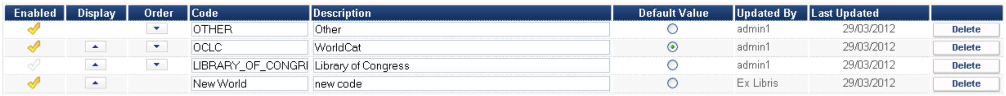


Figure 547: Code Table Page List of Originating Systems for MD Records Codes

2 To disable an enabled originating system for MD records code, click the yellow check mark to the left of the originating system for MD records code.

3 To enable a disabled originating system for MD records code, click the gray check mark to the left of the originating system for MD records code.

4 Use the **Display** or **Order** up and down arrows to set the order of the originating system for MD records codes. The originating system for MD records codes will appear in the defined order in all **Originating System for MD Records** drop-down lists.

5 Modify the group code and description as required.

6 Select **Default Value** if the new originating system for MD records code will be the default originating system for MD records code whenever an **Originating System for MD Records** drop-down list is displayed.

7 Click **Save** to store the modified Originating System for MD Records code in the system.

Deleting and Disabling an Originating System for MD Records Code

You can delete an originating system for MD records code if the originating system for MD records code is no longer required. Alternatively, if the originating system for MD records code is not currently required but may be required in the future, you can disable it.

To delete an originating system for MD records code:

1 Click the **Delete** button to the right of the originating system for MD records code that you want to delete.

2 In the Confirmation Message dialog box, click **Confirm**.

3 Click **Save** to store the list of originating system for MD records codes without the deleted originating system for MD records code.

To disable an originating system for MD records code:

Click the yellow check mark to the left of the originating system for MD records code. The check mark becomes gray to indicate that the originating system for MD records code is disabled. To enable an originating system for MD records code, click the gray check mark to the left of the originating system for MD records code. The check mark becomes yellow to indicate that the originating system for MD records code is enabled.

Remote Digital Repositories

PERMISSIONS:

To configure remote digital repositories, you must have one of the following roles:

- Remote Digital Operator

This functionality allows institutions to integrate their local Digital Asset Management System (such as Rosetta or DSpace) with Alma. This entails the remote digital system providing a bibliographic metadata record (full or partial) with the digital-specific record ID and any additional digital-oriented inventory information embedded as bibliographic field information. This feed ensures that the digital inventory from the remote system is reflected in Alma for new, updated, and deleted digital inventory–ensuring that inventories of all types (physical, electronic, and digital) can be catalogued in one place and managed by one staff.

NOTES:

- At this stage, the synchronization is one-way only: metadata is sent from the local Digital Asset Management (DAM) System to Alma.
- Alma currently supports imports in OAI formats only (either directly online through the http OAI-PMH protocol or using downloaded files in the following OAI formats): `oai_dc` (simple or qualified) , `oai_marc21` or DSpace's simple archive format. If you are working with a different format (such as non-OAI Dublin Core, non-OAI Marc21, or delimited text), convert it to one of the supported OAI formats before attempting to import.

Related Areas of the System

The repositories configured in this section are available in the **Remote digital repository instance** drop-down field during the creation of a new digital import profile.

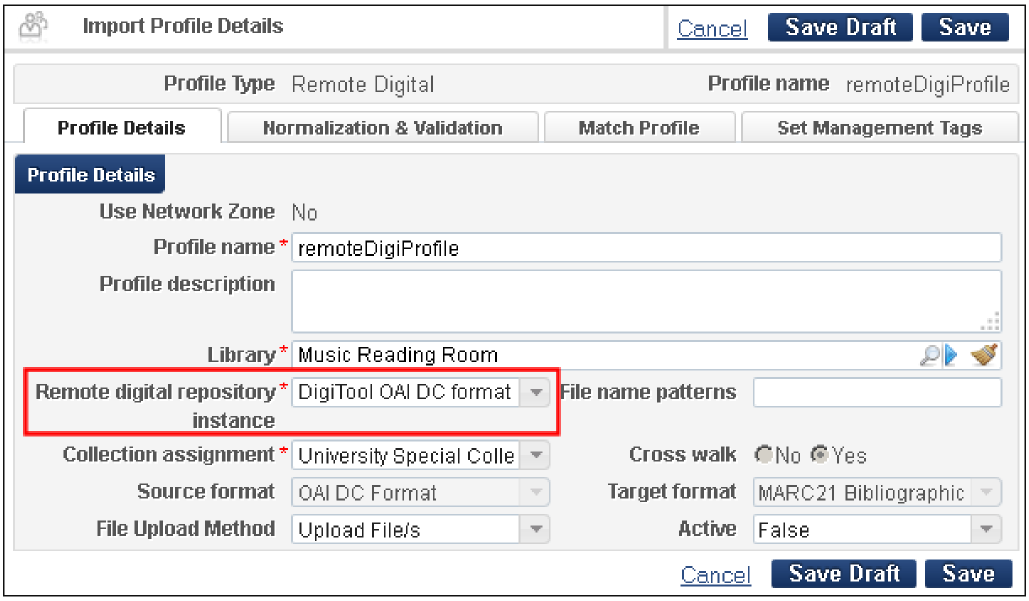


Figure 548: Remote Digital Import Profile Page

For further information, see **Profile Types** on page **512** and **Creating the Profile Using the Wizard** on page **517**. For the broader workflow and links to related information, see **Integrating Remote Digital Asset Management Systems** on page **31** of the *Integrations with External Systems Guide*.

Configuring Remote Digital Repositories

To access configuration for remote digital repositories, select **Resource Management > Resource Configuration > Configuration Menu > Record Import > Remote Digital Repositories**.

The Remote Digital Repositories page opens (**Figure 549**).

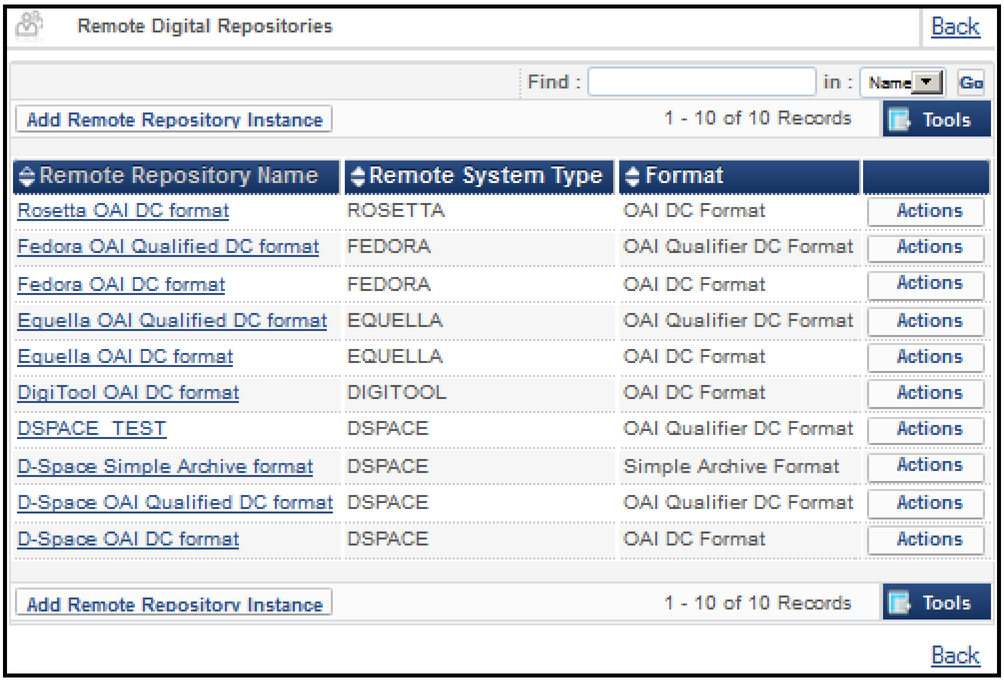


Figure 549: Remote Digital Repositories Page

NOTE:

Out of the box, Alma provides a set of remote digital repositories for D-Space, Rosetta, Digitool, Fedora, Equella, Omeka, and Bepress/DigitalCommons with selected OAI formats. If your format differs, you may choose one of the other system's formats, while ensuring your local format adheres to one of the supported OAI-PMH standards. If none of the supported standard OAI formats can be supplied, new repository types and formats may be considered for enhancement and added by Ex Libris in the future.

From this page, you can add a new instance of a remote repository or you can edit some values of the existing Alma-supplied repository types/formats. When you add a new instance, use the Add Remote Repository Instance button. This will start the three-step wizard that allows you to add a remote repository instance. The three steps correspond to the three tabs of a digital repository definition.

General Information Tab (Wizard Step 1)

The General Information Tab opens first when you edit or view an existing remote repository configuration. The tab contains the same fields as Step 1 of the wizard, when you are adding a repository instance.

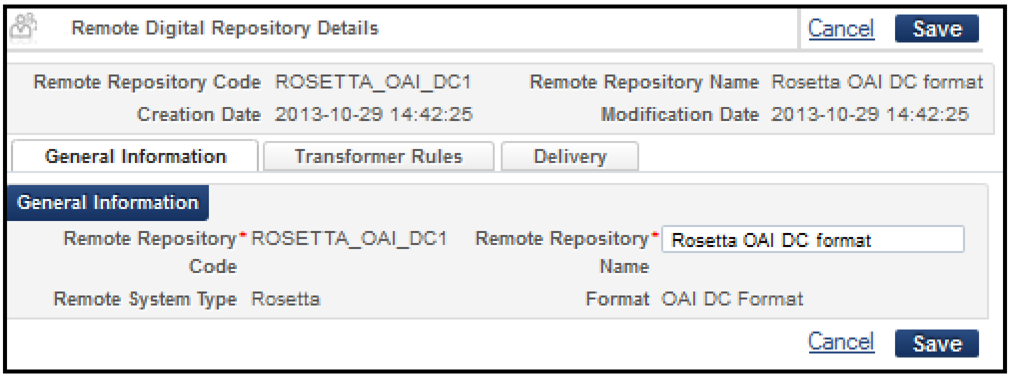


Figure 550: General Information Tab for Remote Digital Repository

The remote repository is defined by the following parameters on this page:

- Remote Repository Code — a unique code that is set when the repository or repository instance is first created. If you are adding a repository instance, the field is blank and you can create a code that indicates the remote system type and format (such as ROSETTA_OAI_QDC for a remote system using Rosetta from a source with the format of OAI QDC).
- Remote Repository Name — the name of the remote digital repository. This name displays as one option in the import profile drop-down list for remote repositories.
- Remote System Type — indicates the external digital system (such as Rosetta or Fedora).
- Format — the format of the records to be imported. Alma supports `OAI-DC`, `Simple-DC`, `oai_marc21`, and `DSpace simple archive`. More formats will be added based on customer needs.

Transformer Rules (Wizard Step 2)

The remote digital repository definitions include a set of rules that determine how the metadata and bibliographic records of digital remote representation resources should be created based on the imported bibliographic records.

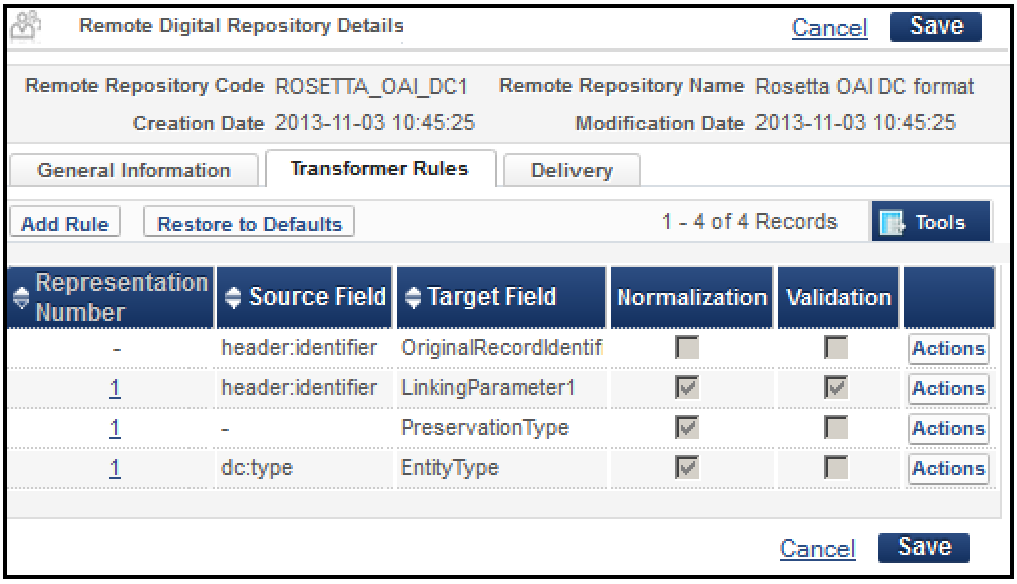


Figure 551: Transformer Rules Tab for Remote Digital Repositories

Transformer rules are logically split into two types:

- General rules — The record identifier, which is used internally in Alma to import the digital resource, does not have a target section and cannot be deleted.
- Representation rules — Rules that define a mapping between the import record values and the remote representation. These rules may be edited, deleted, and added.

NOTE:

The remote digital system integration allows you to build base URL templates to the remote system for digital delivery. Ex Libris recommends that the remote system metadata feed pass only the record ID of the remote digital record rather than a full URL to its delivery. This allows greater flexibility should the digital system base URL change in the future.

Setting Transformer Rules

Representation rules define how information is mapped from the source record to the representation's definition in Alma. In addition, you can create multiple representations in Alma for a single import record when your remote digital system maintains more than one version of a digital inventory record (for instance, high resolution master versus a low resolution copy).

You can configure representation rules per representation instance by selecting **Actions > Edit** in the row of the rule you want to edit or by clicking **Add Rule** in the Transformer Rules tab.

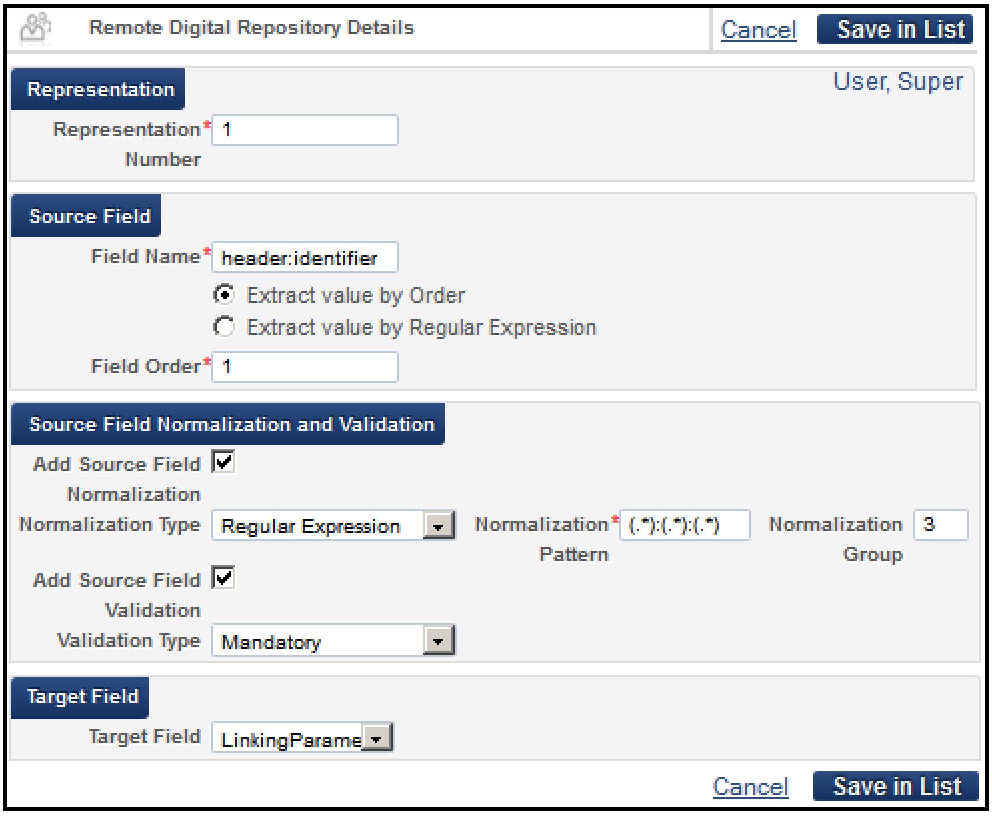


Figure 552: Representation Rules

Representation rules contain the following settings:

Table 82. Representation Rule Settings

Field	Description
Representation section:	
Representation number	The representation instance to which this rule applies. This allows you to specify rules for multiple representations. If you do not want to create multiple representations for an import record, specify **1** for all rules. **NOTE:** Because general rules apply to all representations for the import record, they are not assigned a representation number.

Table 82. Representation Rule Settings

Field	Description
Source Field section: This section is required only if you need information from the source record to create a representation.	
Field name	The name of the field from which to extract its value in the harvested record. A source field value can be retrieved by using one of the following methods: field order or regular expression.
Extract value by order	Allows you to select which occurrence of the field to use. This method requires you to specify the **Field order** field.
Field order	If using the field order method, specify the occurrence of the field. For example, specify **1** in the **Field order** field to select the first occurrence of the field in the import record
Extract value by regular expression	Allows you to match the first value of the field that matches a given regular expression. This method requires you to specify the **Regular expression value extraction** field.
Regular expression value extraction	If using the regular expression method, specify a regular expression to find the field in the import record.
Source Field Normalization and Validation section: This section is required only if you want to change or validate information retrieved from the import record.	
Add source field normalization	Select this field if you want to normalize information retrieved from the import record. Refer to the following fields for more information.

Table 82. Representation Rule Settings

Field	Description
Normalization type	Select one of the normalization methods: ■ **Code table** – Uses the DigitalNormalizerValue code table to retrieve the corresponding codeValue for the source field value. ■ **Constant** – Replaces the value retrieved from the source record with the constant value specified in the **Normalization Pattern** field. ■ **Regular expression** – Specify a regular expression that groups information in the source field's value so that you can extract information for a particular group. For more information, refer to the **Normalization pattern** and **Normalization group** fields.
Normalization Pattern	For the regular expression method, specify a regular expression that separates the source field's value into groups of information so that you can extract information from a particular group, which is specified in the **Normalization group** field. For the constant normalization method, specify a value that will replace the source field's value in the representation.
Normalization group	For the regular expression method only, specify which group of information (as determined by the **Normalization pattern** field) to extract from the source field's value.
Add source field validation	Select this field if the source field's value is required to create the representation. Otherwise, no validation is performed on the source field's value. Refer to the **Validation type** field, for more information.
Validation type	Set this field to **Mandatory** if a value is needed to create the representation. Otherwise, the representation will created even if the field's value does not exist in the import record.

Table 82. Representation Rule Settings

Field	Description
Target Field section:	
Target field	Specify one of the following fields, which will be populated on the Digital Representation Resource Editor page for the representation: ■ **Entity Type** – can be used for storing values such as Web site, E-book, Digitized photo and more. ■ **Linking Parameter 1 - 5** – a value that is needed to create View It and Thumbnail links. This can be the ID of the object in the remote system that should be used as part of the delivery URL (for example, `http://some-system.com?view={Linking Parameter}`) ■ **Representation Type** – can be used to tell if a representation is an **Access Copy** or a **Master**

Transformer example:

This example shows how the linking ID, which is stored in the <identifier> element of an OAI-DC import record, is normalized, stored in the LinkingParameter1 target field, and used to build the URL that allows users to view the item in the remote digital respository.

```
<OAI-PMH xmlns="http://www.openarchives.org/OAI/2.0/" xmlns:xsi="http://www.w3.org/20
    <responseDate>2014-11-02T06:56:24Z</responseDate>
    <request verb="ListRecords" metadataPrefix="oai_dc" set="testForOaiDc2Alma">
http://dc03vg0053eu.hosted.exlibrisgroup.com:8881/OAI-PUB
    </request>
    <ListRecords>
        <record>
            <header>
                <identifier>oai:digitool-demo.exlibrisgroup.com:343143</identifier>
                <datestamp>2014-10-07T10:38:03Z</datestamp>
                <setSpec>testForOaiDc2Alma</setSpec>
            </header>
            <metadata>
                <oai_dc:dc xmlns:oai_dc="http://www.openarchives.org/OAI/2.0/oai_dc/"
                    <dc:title>The Market and the Social Economy</dc:title>
                    <dc:creator>Willie Cheng</dc:creator>
                    <dc:subject>New Social Models</dc:subject>
                    <dc:publisher>Select Books Pte. Ltd.</dc:publisher>
                    <dc:contributor>Singapore Management University. Li Ka Shing Libr
                    <dc:identifier>
                    http://dc03vg0053eu.hosted.exlibrisgroup.com:1801/webclient/Deliv
                    </dc:identifier>
                    <dc:identifier>THUMBNAIL:343173</dc:identifier>
                </oai_dc:dc>
            </metadata>
        </record>
    </ListRecords>
</OAI-PMH>
```

Figure 553: Example OAI-DC Import Record - Linking ID

To extract the linking ID and build the delivery URL:

1. On the Resource Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Remote Digital Repositories** under **Record Import** to open the Remote Digital Repositories page.
2. Select **Actions > Edit** for your remote digital repository.
3. The General Information tab opens on the Remote Digital Repository Details page.
4. Select the Transformer Rules tab to display the list of defined transformation rules.

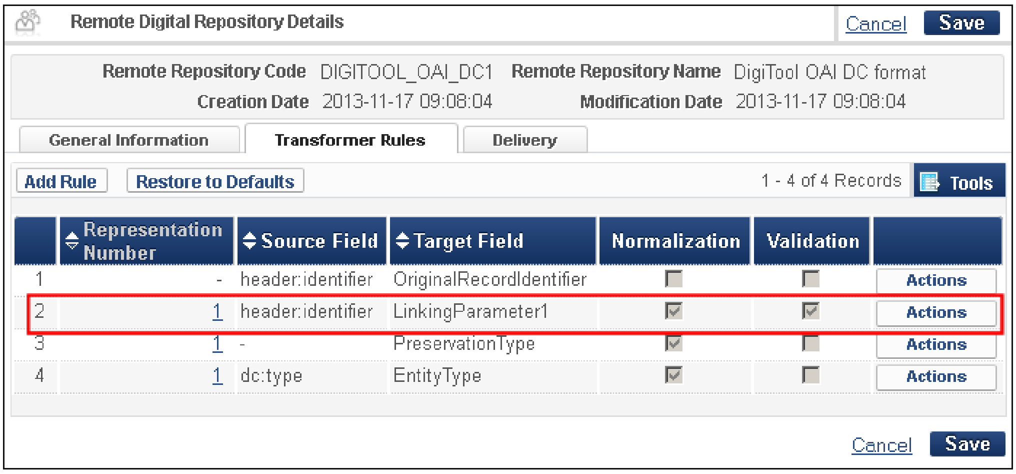


Figure 554: Transformer Rules Tab

5 Select **Actions > Edit** for the **LinkingParameter1** target field.

The transformation details for the linking parameter opens in the editor page.

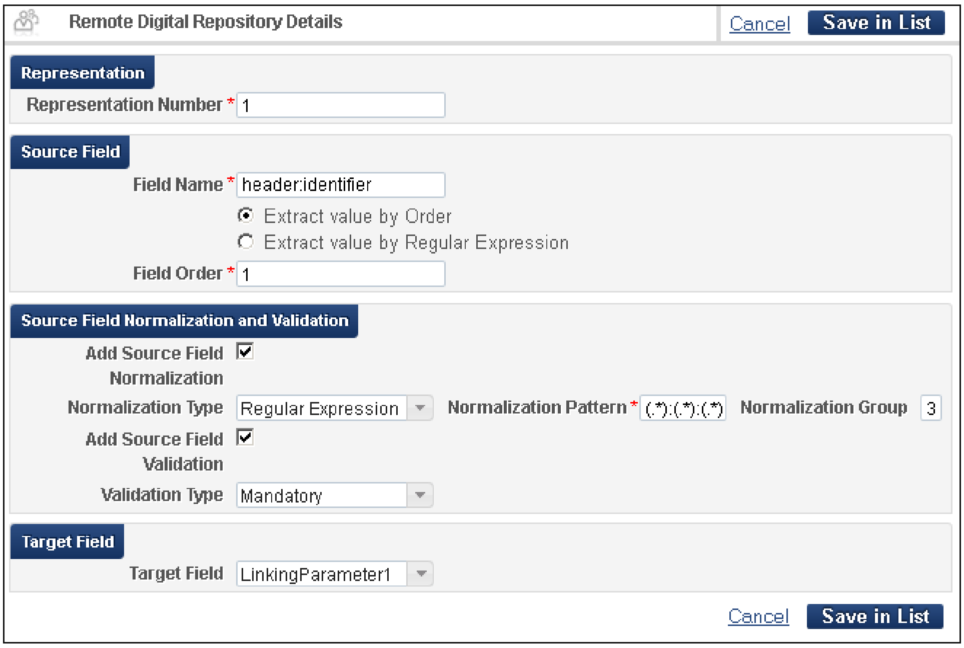


Figure 555: Transformer Rules Editor

NOTE:

If additional information from the input record was needed to build the URL, you would have to create additional rules to pass that information to additional linking parameter fields (**LinkingParameter2** - **LinkingParameter5**), as needed.

6 Specify the following fields:

Table 83. Representation Rule Settings

Field	Description
Representation section:	
Representation number	Because you are only creating one representation per import record, specify **1**.
Source Field section:	
Field name	Specify **header:identifier**, which is the field that contains the object's ID in the import record (see **Figure 553**). For this example, the following value is extracted from the import record: `oai:digitool-demo.exlibrisgroup.com:343143`
Extract value by order	Select this method to extract the value.
Field order	Specify **1** to extract the entire value from the first and only **header:identifier** field for this record.
Source Field Normalization and Validation section:	
Add source field normalization	Select this field because information is needed from the import record.
Normalization type	Select **Regular Expression**.
Normalization Pattern	Specify the following regular expression to separate the value of the identifier into three groups, where each group is separated by a colon in the value: `(.*):(.*):(.*)`
Normalization group	Specify group **3**, which holds the ID number for the object. For this example, the following value is extracted: `343143`
Add source field validation	Select this field to make sure that an ID exists for the object.
Validation type	Set this field to **Mandatory**.

Table 83. Representation Rule Settings

Field	Description
Target Field section:	
Target field	Select the **LinkingParameter1** field. For this example, the following value is stored in the **LinkingParameter1** field: `343143`

7 Select the Delivery tab to configure the template that Alma uses to build the URL that displays the object in the remote digital repository.

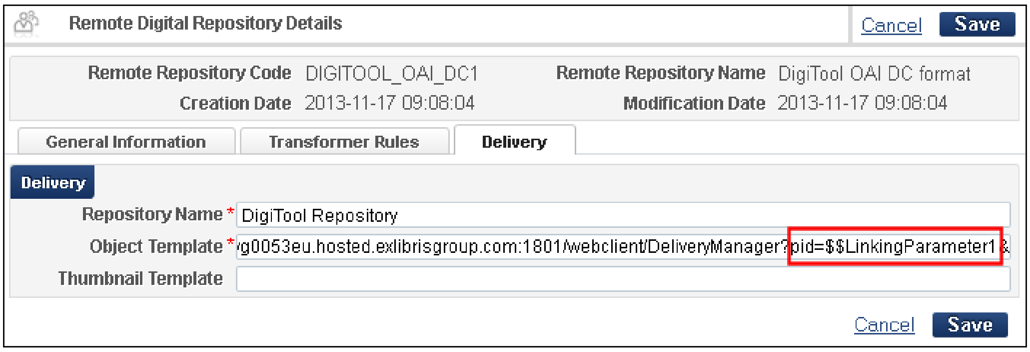


Figure 556: Delivery Tab

In the **Object template** field, add the **LinkingParameter1** field to the URL. In this example, the object template was set to the following URL, which was dependent upon the Digital Asset Management system that was used:

```
http://dc03vg0053eu.hosted.exlibrisgroup.com:1801/
webclient/DeliveryManager?pid=$$LinkingParameter1&amp;
custom_att_2=simple-viewer
```

This link appears as follows in the Primo View It tab:

Figure 557: Delivery Link in Primo View It Tab

Delivery (Wizard Step 3)

The remote digital repository includes a set of configurations that support the viewing of loaded remote digital resources.

To edit conditions for a remote digital repository, or to create a new configuration based on one of the existing, out-of-the-box configurations, access the Wizard Step 3 through the **Add**... process, or select the **Delivery** tab of the Remote Digital Repository Details page.

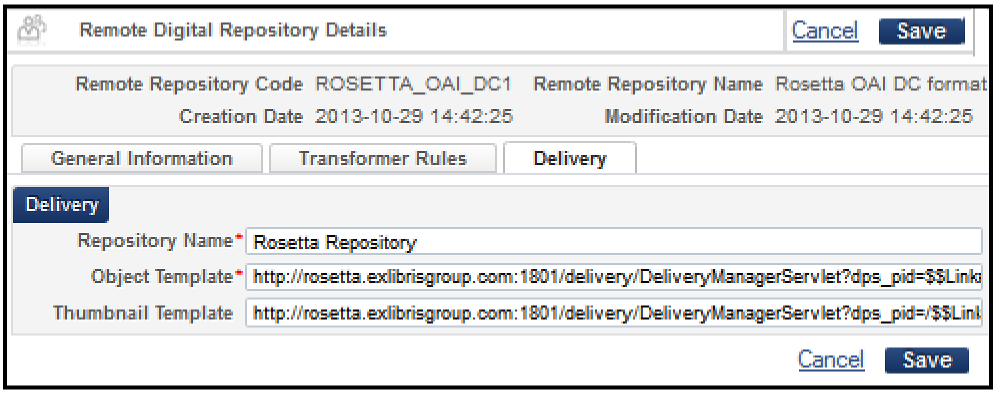


Figure 558: Delivery Tab for Remote Digital Repository

The following configuration is available:

- Repository Name – The repository name to be displayed both in the View It and Search Results screens.

- Object Template – the URL template to view remote digital resources.

  This URL contains general attribute parameters such as linkingParameter1, linkingParameter2 …, linkingParameter5 (note that these parameters are extracted using the representation rules configuration).

  Enter the information in the syntax as follows:

  For DigiTool:

  ```
  <DigiTool base URL>/webclient/
  DeliveryManager?pid=$$LinkingParameter1&amp;custom_att_2=simp
  le_viewer
  ```

  Example:

  ```
  http://www.digi-tool.com/webclient/
  DeliveryManager?pid=$$LinkingParameter1&amp;custom_att_2=simp
  le_viewer
  ```

  For Rosetta:

  ```
  <Rosetta base URL> delivery/
  DeliveryManagerServlet?dps_pid=<$$LinkingParameter1>
  ```

  Example:

  ```
  http://rosetta.com/delivery/
  DeliveryManagerServlet?dps_pid=IE4536647
  ```

  For Dspace:

  ```
  <DSpace base URL>/xmlui/<$$LinkingParameter1>
  ```

  Example:

  ```
  http://open.ut.edu/xmlui/430494
  ```

- Thumbnail Template – URL template for generating an object's thumbnail resource link (to be used only when the remote repository supports thumbnail generation).

General

This section describes:

- **Configuring Other Settings** on page **695**
- **Configuring Processes** on page **700**
- **Configuring Provenance Codes** on page **701**
- **Configuring Accession Numbers** on page **706**
- **Configuring E-Task Statuses** on page **710**
- **Configuring the Label Printing Tool** on page **712**

Configuring Other Settings

PERMISSIONS:

To configure other settings, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

This option enables you to customize other settings that are not specific to any other resource management action.

You configure other settings from the Mapping Table page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **Other Settings** from the **General** section on the Configuration page.

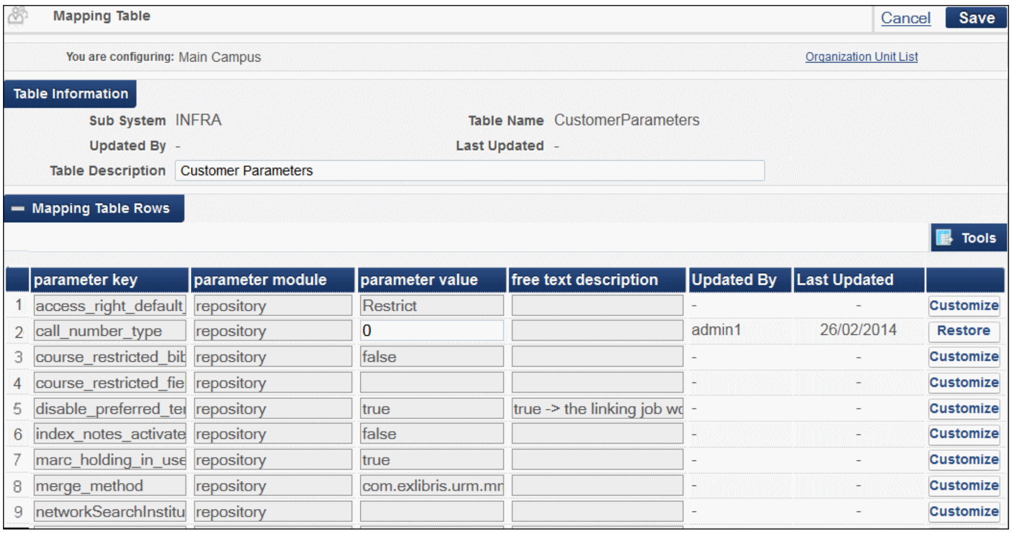


Figure 559: Mapping Table Page - Other Settings

The following table describes the Other Settings options:

Table 84. Other Settings

Parameter Key	Description
access_right_default_policy	Define the access rights that are applied to all digital inventory that are not attached to access rights. Possible values are: ■ **Restrict** – Indicates that all users are restricted from accessing the specified digital object ■ **Allow** – Indicates that all users are allowed to access the specified digital object
activation_due	Define a default e-activation task due date. The due date is added to all e-activation tasks. When the due date passes, a notification is sent to the user that is assigned the e-resource activation task and an alert is displayed in the user's list of tasks. For more information, see **Managing Electronic Resource Activation** on page **395** and the **Manually Creating a PO Line** section of the *Alma Acquisitions Guide*.
asrs_socket_timeout	Not functional (for future use)
call_number_type	If the call number type of a given holdings record has not been specified (MARC 852 first indicator) and no default call number type has been configured for the location of the holdings record, the value selected here is used by default. The following values for the call number type are supported: 0 - Library of Congress classification 1 - Dewey Decimal classification 2 - National Library of Medicine classification 3 - Superintendent of Documents classification 4 - Shelving control number 5 - Title 6 - Shelved separately 7 - Source specified in subfield $2 8 - Other scheme
course_restricted_bib_data_will_be_deleted	Indicate True to delete a bibliographic record that is created as course restricted when the course is deactivated. If the value of this field is False, the record is suppressed from publication.

Table 84. Other Settings

Parameter Key	Description
course_restricted_field	The field in the bibliographic MARC record that indicates whether a bibliographic record is restricted for use by a course. Note that it is possible in Alma to use defined subfield separators, such as dollar dollar $$ or double dagger ‡. The type that is defined as the subfield separator must also be stipulated in this field.
disable_preferred_term_ correction_job	If set to False, the **Authorities - Preferred Term Correction** job performs preferred term correction on all bibliographic records that are linked to authority records via the **Authorities - Link bibliographic headings** job. By default, this parameter is set to True. For more information on this parameter and the **Authorities - Preferred Term Correction** job, see **Working with Authority Records** on page **184**.
ignore_cz_records	Various processes in Alma (such as the following) use record matching before adding records to the institution's catalog: ■ Metadata import ■ OCLC Connexion matching ■ Linking IZ (Institution Zone) records to NZ (Network Zone) records To fine tune the matching process, Alma allows you to indicate at the institution level whether to consider matching records that are linked to the CZ (Community Zone). The valid values are **true** and **false**. If this parameter is set to **true**, Alma will match incoming records with any record that exists in the catalog and ignore bibliographic records that link to CZ bibliographic records.
index_notes_activated	Not in use.
marc_holding_in_use	Indicate True to display holdings records in MARC format.
merge_method	The drool file that defines the default merge profile to be used in the metadata editor when importing a record from an external source or when importing files of records to be merged with existing records.
networkSearchInstitution	The code of the Network Zone institution.
networkSearchInstitutionId	The ID of the Network Zone institution.
networkSearchPassword	The password of the Network Zone institution.
networkSearchServer	The name of the server of the Network Zone institution.

Table 84. Other Settings

Parameter Key	Description
non_serial_match_profile	The default match profile for non-serial items in the MD Editor and Search External Resources (the match profiles for import profiles are defined elsewhere). Enter one of the following file keys in the **Parameter Value** column: ■ `com.exlibris.repository.mms.match.CDLMatchingProfile` – The Fuzzy Non-Serial match method uses an internal algorithm based on a combination of the 245, 260, 020, 035, and 010 fields. The record with the highest score is considered to be the matching record. ■ `com.exlibris.repository.mms.match.IDsMatchProfile` – The ISBN 024/035 match method matches based on any one of the following fields: 020, 024, or 035. If a field contains several values, any one of the values is used to match. The 020 and 035 fields are checked first. ■ `com.exlibris.repository.mms.match.ISBNMatchProfile` – The ISBN match method matches based on the 020 field only. ■ `com.exlibris.repository.mms.match.LCCNMatchProfile` – The LCCN match method matches based on the 010a field only. ■ `com.exlibris.repository.mms.match.OCLCMatchProfile` – The 035 (Other System Identifier) match method matches based on the system control number that uses any 035 field. If the 035 field contains several values, any one of these values is used to match. For NZ institutions, refer to the procedure **To configure the MD Editor Share With Network function to find matches based upon the 035 field:** on page 7 in the Working with Collaborative Networks in *Alma Guide* for more information.
publishing_test_mode	For Ex Libris staff use only.
search_limit	Deprecated.

Table 84. Other Settings

Parameter Key	Description
serial_match_profile	The default match profile for serial items in the MD Editor and Search External Resources (the match profiles for import profiles are defined elsewhere). Enter one of the following file keys in the **Parameter Value** column: ■ `com.exlibris.repository.mms.match.CDLSeMatchingProfile` – The Fuzzy Serial match method uses an internal algorithm based on a combination of the 245, 260, 022, 035, and 010 fields. The record with the highest score is considered to be the matching record ■ `com.exlibris.repository.mms.match.IDsSerialMatchProfile` – The ISSN 024/035 match method matches based on any one of the following fields: 022, 024, or 035. If a field contains several values, any one of the values is used to match. The 022 and 035 fields are checked first. ■ `com.exlibris.repository.mms.match.ISSNMatchProfile` – The ISSN match method matches based on the 022 field only. ■ `com.exlibris.repository.mms.match.LCCNSerialMatchProfile` – The LCCN Serial match method matches based on the 010a field only. ■ `com.exlibris.repository.mms.match.OCLCSerialMatchProfile` – The 035 (Other System Identifier) match method matches based on the system control number that uses any 035 field. If the 035 field contains several values, any one of these values is used to match. For NZ institutions, refer to the procedure **To configure the MD Editor Share With Network function to find matches based upon the 035 field:** on page 7 in the Working with Collaborative Networks in *Alma Guide* for more information.
suppressBibWithDeletedHol	Indicate True to suppress the bibliographic record when the holdings record is deleted.
suppressBibWithSuppressedHol	Indicate True to suppress the bibliographic record when the holdings record is suppressed.
system_date_format	The system date format, for example: dd/MM/yyyy
upload_single_record_from_file	The import profile used when importing a single bibliographic record. For more information, see **Running a New Import Job** on page 565.
use_holdings_form	Indicate True to use the Form format to display the holdings record in the MD Editor. If False, MARC format is used.

Table 84. Other Settings

Parameter Key	Description
working_copy_lock timeout	Enter the number of hours in the Parameter Value cell that you want the bibliographic record to be locked. The amount you specify can be up to 9999 and excludes 0. Refer to **Edit** on page **42** in **Table 6**, **Search Results List Actions** for additional information.

To edit other settings:

1. On the Mapping Table page, change the **Table Description** as required.
2. Under **Mapping Table Rows**, locate the setting that you want to edit, and click **Customize**.
3. Modify the parameter value as required.

NOTE:
You can, at any time, click **Restore** to restore the initial parameter value.

4. Click **Save.** The modified customer parameters are saved in the Alma system.

Configuring Processes

PERMISSIONS:
To configure processes, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Batch jobs or processes can be run from a standard list of available processes (defined by Alma) and monitored from the Alma menu (see **Monitoring Jobs** on page **286** in the *Alma Administration Guide*). The list of available processes is updated as and when new processes are defined.

Each process requires different sets of parameters that may be changed from time to time.

For more information on configuring/running processes see **Running Jobs on Defined Sets** in the *Alma Administration Guide*.

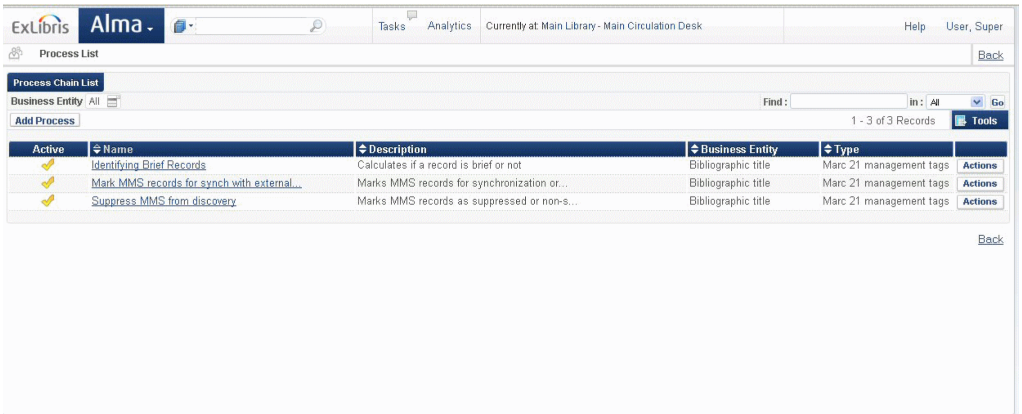


Figure 560: Configuring Processes

NOTE:

The Active column is not functional. All columns listed are active.

Configuring Provenance Codes

PERMISSIONS:

To configure provenance codes, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

The provenance code is an arbitrary code that an institution can assign to a group of items for tracking purposes. It is not required. For example, it may be used if a library receives a donation of materials that are not shelved together but need to be tracked as one group.

To configure provenance code, navigate to the Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) and select **Provenance Code** from the **General** section.

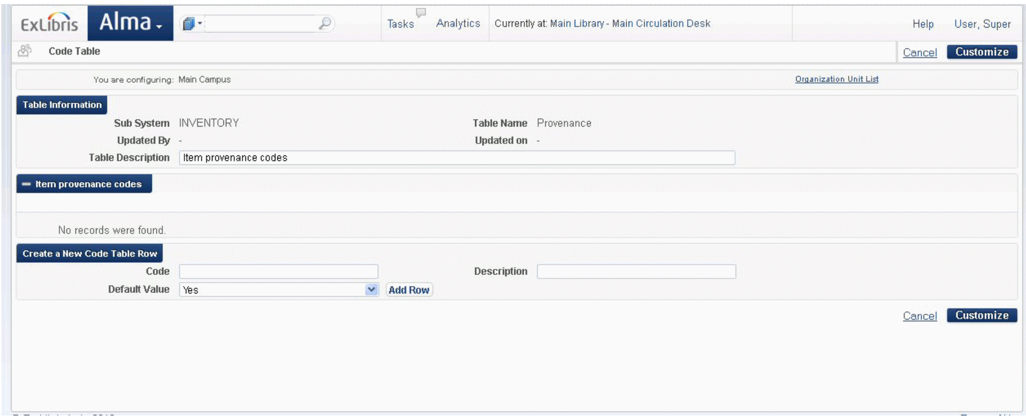


Figure 561: Code Table Page – Provenance Codes

This section describes:

- **Viewing the List of Provenance Codes** on page **702**
- **Adding a Provenance Code** on page **703**
- **Editing Provenance Code Details** on page **704**
- **Deleting and Disabling a Provenance Code** on page **704**

Viewing the List of Provenance Codes

The Code Table page displays:

- details about the provenance codes for the institution. Most of the details are system-generated and cannot be edited.
- a list of the provenance codes that are defined for the institution.
- a group of input fields that enable you to define and create a new provenance code.

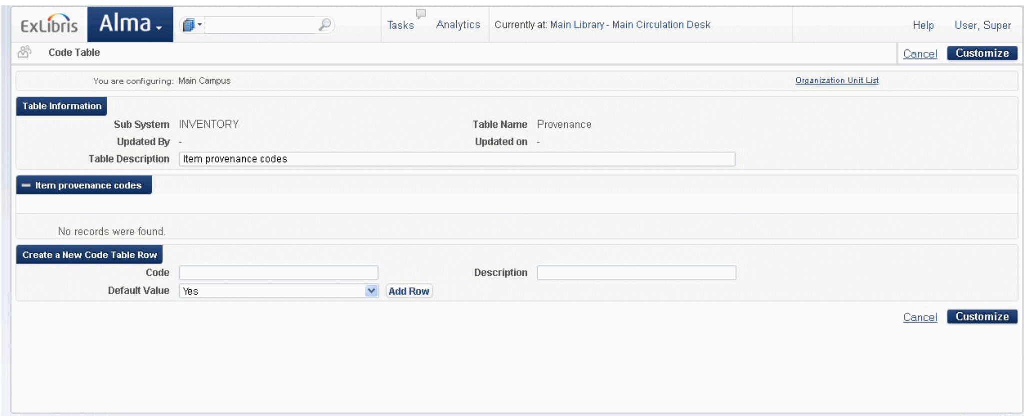


Figure 562: Code Table Page - Provenance Codes

Adding a Provenance Code

You can add a new provenance code to the institution. The provenance code that you add applies to all libraries within the institution.

To add a provenance code:

1. On the Code Table page, under **Create New Code Table Row**, enter a code for the new provenance code.

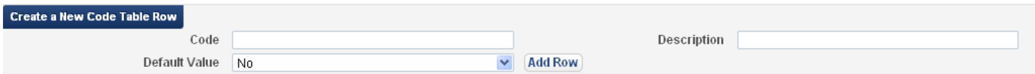


Figure 563: Create New Provenance Row Section of the Code Table Page

2. Enter a code and description for the new provenance code.
3. From the **Default value** drop-down list, select **Yes** if the new provenance code will be the default override policy whenever a **Provenance Code** drop-down list is displayed.
4. Click the **Add Row** button. The new provenance code is displayed at the bottom of the list of defined provenance codes.
5. Click **Save** to store the new provenance code details in the system.

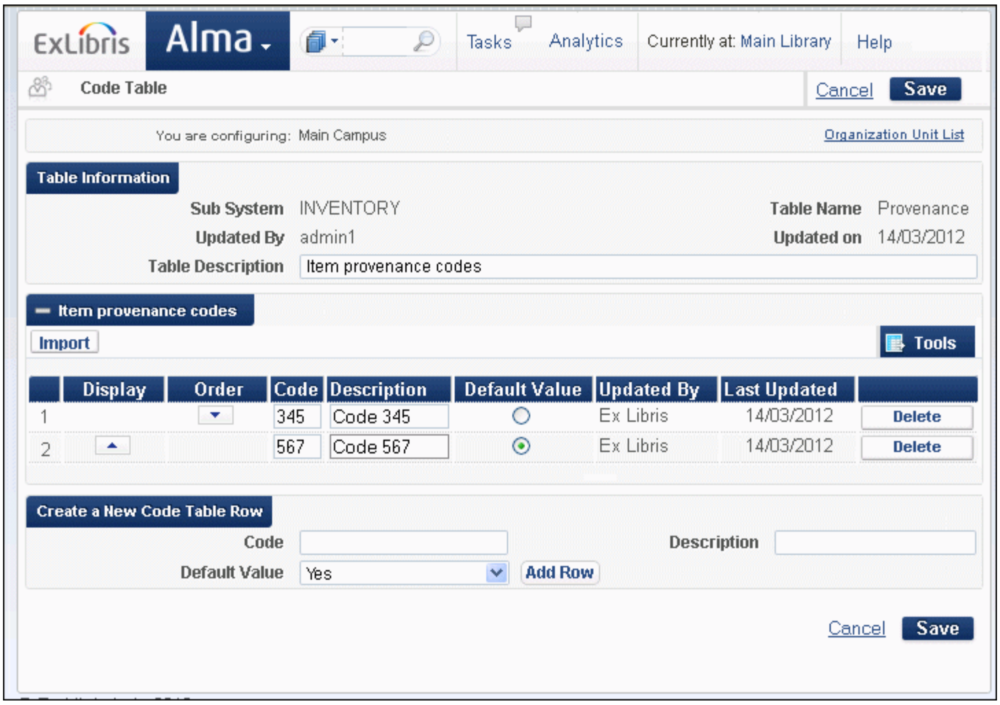


Figure 564: Code Table Page – Provenance Codes

Editing Provenance Code Details

You can edit the details of a provenance code.

To edit the details of a provenance code:

1. On the Code Table page, in the **Item Provenance Codes** area, locate the code that you want to edit.

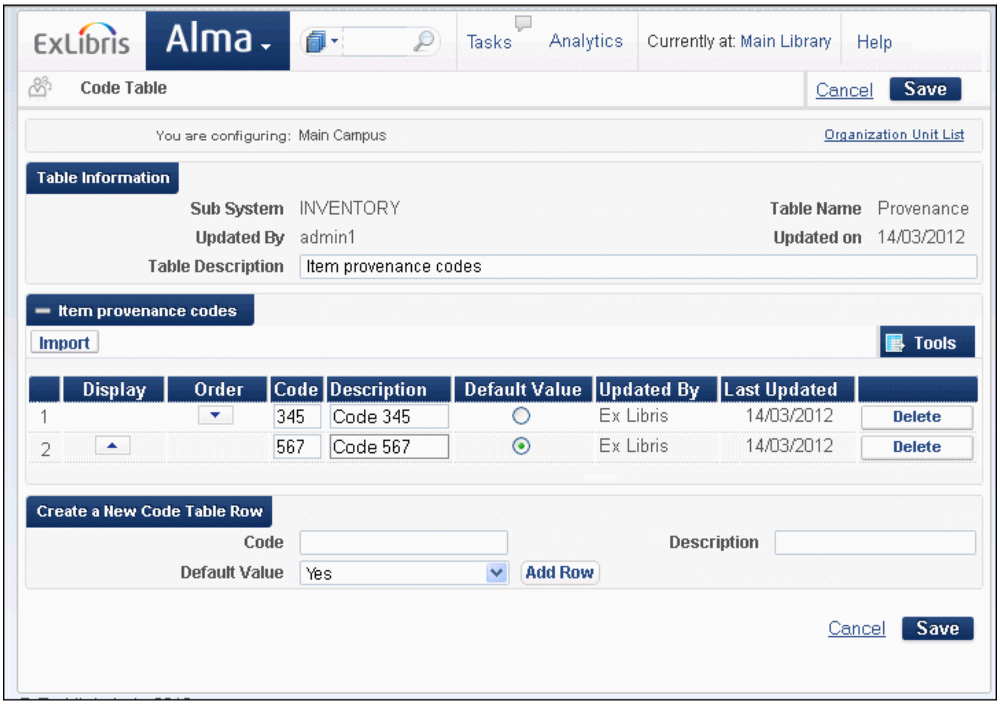


Figure 565: Code Table Page – List of Provenance Codes

2. Use the **Display** or **Order** up and down arrows to set the order of the provenance code. The provenance codes will appear in the defined order in all **Provenance Code** drop-down lists.
3. Modify the provenance code and description as required.
4. Select **Default Value** if the new provenance code will be the default provenance code whenever a **Provenance Code** drop-down list is displayed.
5. Click **Save**. The provenance code is stored in the Alma system.

Deleting and Disabling a Provenance Code

You can delete a provenance code if the provenance code is no longer required.

To delete a provenance code:

1. Click the **Delete** button to the right of the provenance code that you want to delete.
2. Click **Confirm** in the Confirmation Message dialog box.
3. Click **Save** to store the list of provenance codes without the deleted policy.

Provenance Code Example

If you define two provenance codes, for example, Winter Display and Summer Display:

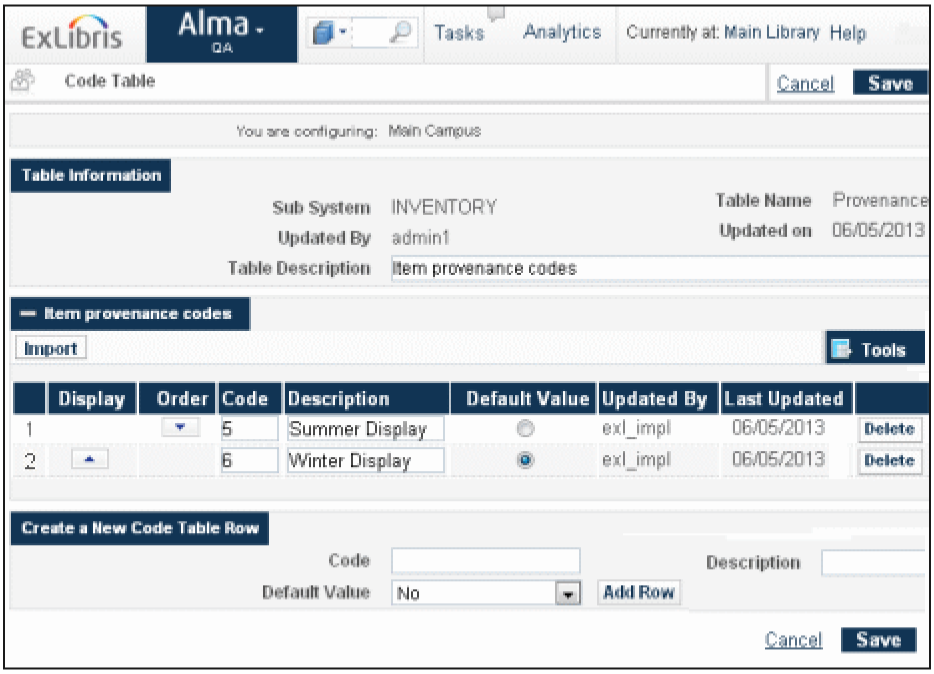


Figure 566: Provenance Code Example

These options are displayed when editing physical item records. Since Winter Display is defined as the default value, it is displayed first:

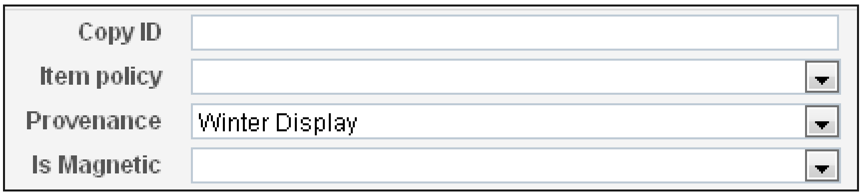


Figure 567: Provenance Code Example in Physical Item Editor

Configuring Accession Numbers

PERMISSIONS:

To configure accession numbers, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

You can automatically generate accession numbers in holdings records to identify a resource and configure how these numbers are generated. For example, you can use a prefix that includes the year the resource is acquired, and the resource number (if duplicate resources have been acquired), or you can identify by location.

NOTE:

For more information on Alma accession numbers, refer to the *Alma Record Numbering System* document under **Alma > Product Documentation > Resource Management > How To Documents and Presentations** in the Documentation Center.

The accession number begins by default at 1 and is incremented by 1 each time an accession number is generated. It is possible to set an initial value different than 1. It is also possible to skip some numbers and set a new next sequence value, which must be higher than the last one in use. (For more information, see **Editing an Accession Number** on page **709**.)

After you configure the accession number, it is generated in the MD Editor for a holdings record by selecting **Tools > MARC 21 Holdings > Generate Accession Number**.

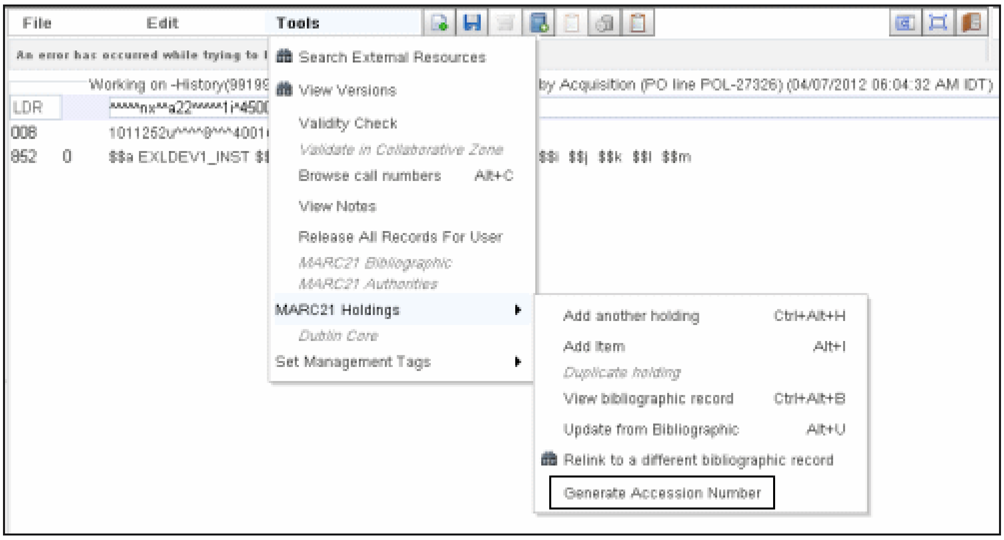


Figure 568: Generate Accession Number

You configure accession number from the Accession Configuration page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **Accession Number** from the **General** section on the Configuration page.

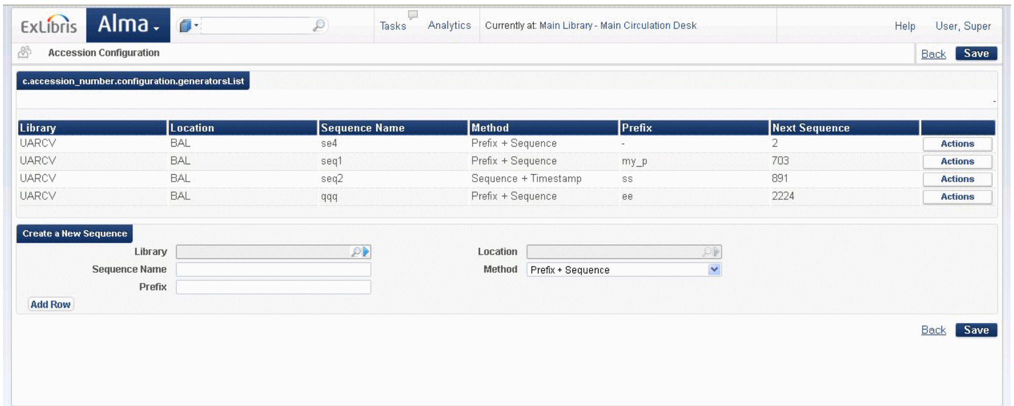


Figure 569: Accession Number Page

This section describes:

- **Viewing the Accession Number List** on page 708
- **Adding a New Accession Number Sequence** on page 708
- **Editing an Accession Number** on page 709
- **Deleting an Accession Number** on page 709

Viewing the Accession Number List

The Accession Configuration page displays the following:

- a list of the library locations
- the method assigned to generate the accession number

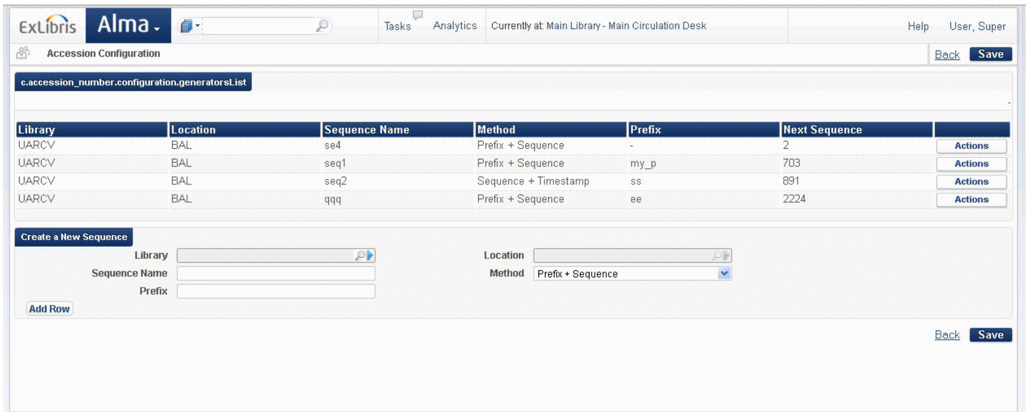


Figure 570: Accession Configuration Page

Adding a New Accession Number Sequence

You can add a new sequence to the list of accession numbers.

To add a new sequence:

1. On the Accession Configuration page, under **Create a New Sequence**, select a library from the **Library** drop-down list code for the new sequence.

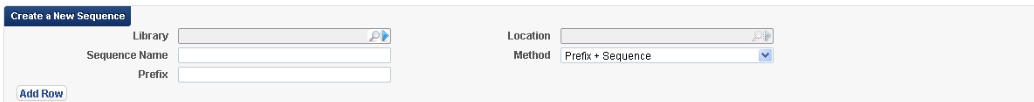


Figure 571: Code Table Page Create New Provenance Row

2. In the **Location** drop-down list, select a location for the new sequence.
3. In the **Sequence Name** field, enter a name for the new sequence.
4. In the **Method** drop-down list, select a method to generate the new sequence.
5. Click **Add Row**. The new sequence is added to the Accession Configuration list.

Editing an Accession Number

The accession number begins by default at 1 and is incremented by 1 each time an accession number is generated. It is possible to set an initial value different than 1. It is also possible to skip some numbers and set a new next sequence value, which must be higher than the last one in use.

To edit the accession number:

1 On the Accession Configuration page, select **Actions > Set Next Sequence Value** for the library whose sequence value you want to change. The Set next number value dialog box opens.

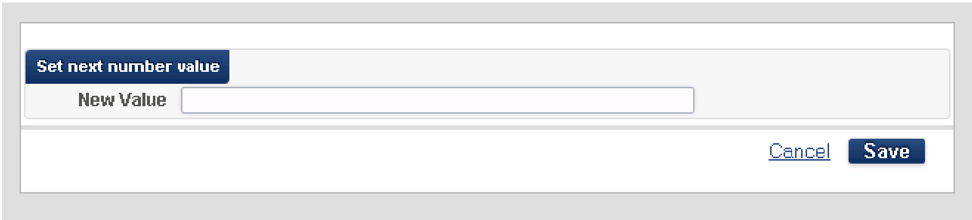


Figure 572: Set Next Number Value Dialog Box

2 Enter the next value.

3 Click **Save**. The new sequence value displays on the Accession Configuration page.

Deleting an Accession Number

You can delete a library's accession number.

To delete an accession number:

1 On the Accession Configuration page, select **Actions > Delete** for the library whose accession number you want to delete.

2 Click **Confirm** in the Confirmation Message dialog box.

3 The accession number is removed from the Accession Configuration list.

Assigning Accession Number Placement

In order to have the automatically generated accession number indexed and thereby searchable in the repository, you must assign the accession number to a MARC field. For more information, the **Editing Physical Location** section in the *Alma Fulfillment Guide*.

Configuring E-Task Statuses

PERMISSIONS:

To configure e-task statuses, you must have one of the following roles:

- Repository Administrator

When you manage electronic resource activation from **Manage Inventory > Manage Electronic Resource Activations** or **Manage Inventory > Manage Electronic Resource Activations > Actions > Edit**, you assign a status to the electronic resource from a drop-down list. This section describes how you configure the statuses available to be assigned. For more information, see **Managing Electronic Resource Activation** on page **395**.

You configure the e-task statuses from the Code Table page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **E Task Statuses** from the **General** section on the Configuration page.

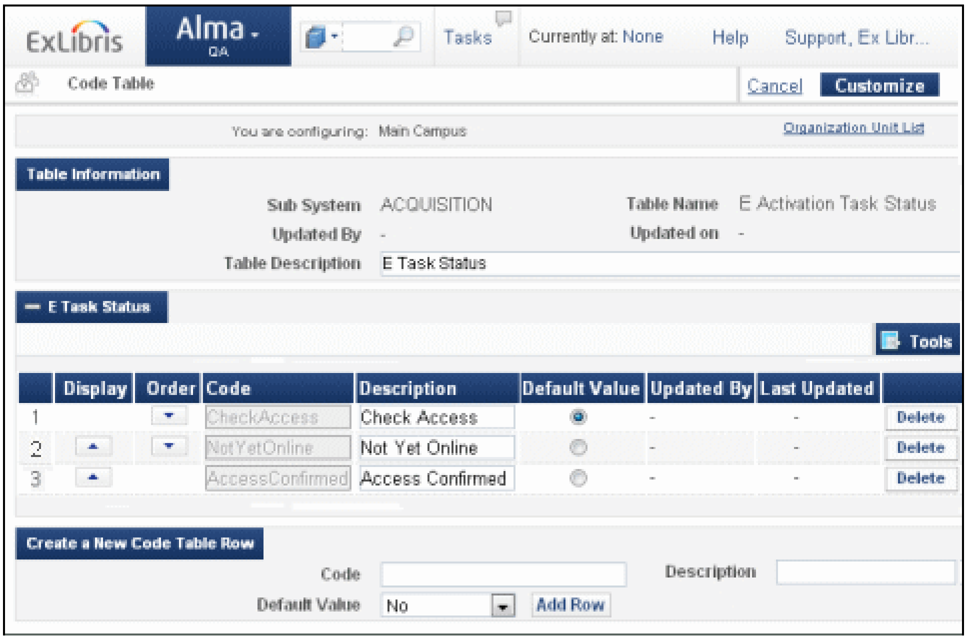


Figure 573: E Task Statuses

This section describes:

Viewing the E-Task Statuses on page **711**

Adding an E-Task Status on page **711**

Editing E-Task Details on page **711**

Deleting an E-Task on page **712**

Viewing the E-Task Statuses

The Code Table page displays:

- details about the table that contains the e-task statuses
- a list of the e-task statuses that are defined for the institution
- a group of input fields that enable you to define and create a new e-task

Adding an E-Task Status

You can add new e-tasks to the institution. The tasks that you add are available to all libraries within the institution.

If you prefer to use the Import option to populate the code table, see **Importing Information to Code Tables** *in the Alma Administration Guide* for more information.

To add a new e-task:

1. On the Code Table page, under **Create New Code Table Row**, enter a code for the new e-task.
2. Enter a code and description for the new e-task.
3. Select the **Default value** check box if the new e-task will be the default e-task whenever an **e-task** drop-down list is displayed.
4. Click the **Add Row** button. The new e-task is displayed at the bottom of the list of defined e-tasks. Use the **Move Up** and **Move Down** arrows to set the order of the e-task.
5. Click **Save** to store the new e-task details in the system.

Editing E-Task Details

You can edit the details of any e-task.

To edit the details of an e-task:

1. On the Code Table page, under **E-Task Status**, locate the e-task that you want to edit.
2. Use the **Display** or **Order** up and down arrows to set the order of the e-tasks. The groups will appear in the defined order in all **e-task** drop-down lists.
3. Modify the code and description as required.
4. Select **Default value** if the new e-task will be the default e-task whenever an e-task drop-down list is displayed.
5. Click **Save** to store the modified e-task in the system.

Deleting an E-Task

You can delete an e-task if it is no longer required.

To delete an e-task:

1 Click the **Delete** button to the right of the e-task that you want to delete.
2 Click **Save** to store the list of e-tasks without the deleted group.

Configuring the Label Printing Tool

PERMISSIONS:

To configure the label printing tool, you must have one of the following roles:

- API Label Printing Read
- General System Administrator

You can use the Alma Label Printing tool to print book labels. To do this, configure the label printing tool from the Download Label Printer page (follow the Alma menu path **Resource Management > Resource Configuration > Configuration Menu**, then, from the Configuration page, select **Label Printing Tool** from the **General** section).

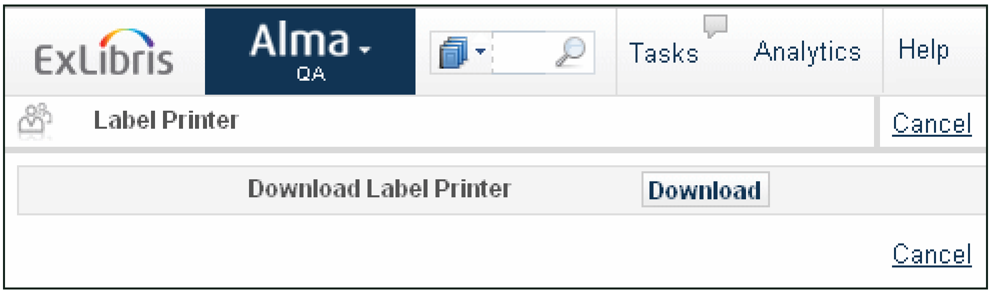


Figure 574: Download Label Printing

NOTE:

Before downloading the Alma printing tool you must confirm that you have Java 1.7.0_04 or later and a third-party, XML-based PC print solution, such as BIAF in stalled on your computer. If you want to use the Ex Libris provided BIAF spine label application, contact Ex Libris Support. For detailed information regarding this tool, see *How to Configure and Use Alma with BIAF to Print Labels*. (Note that you must be logged in to the Documentation Center in order to view this document.)

To download the label printing tool:

1 Click **Download**.

Your browser's download box opens with the file `urm_label_printer.zip`.

2 Open or save the `urm_label_printer.zip` file, then extract the files using your computer's extraction tool or wizard.

3 Complete the wizard steps to store the label-printing files and folders on your computer.

To install and configure the label printing tool:

1 Run the `run.bat` file from the `bin` directory from the location in which you saved the files. After the software is successfully installed, the Label Printer application opens to the default tab, Item Details.

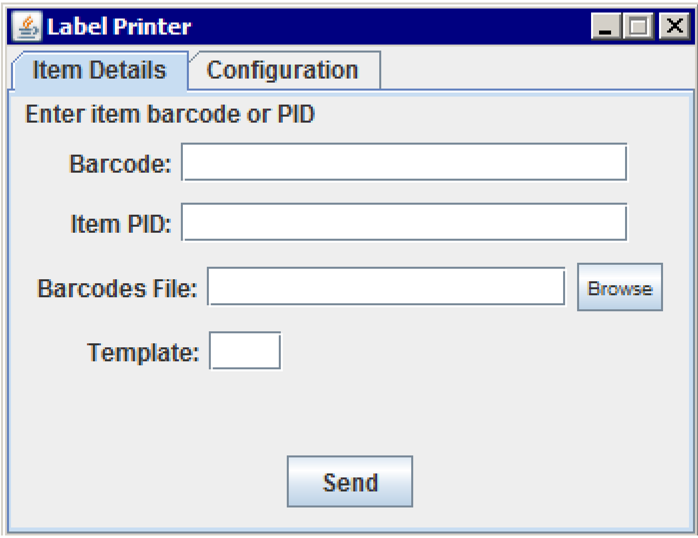


Figure 575: Item Details

2 Click the **Configuration** tab to enter user and location information.

3 Fill in the User, Password, Alma URL, and Institution fields. For the user name and password, enter the Alma logon information of the staff operator that uses the application.

4 The Program Location and Program Parameters fields are intended for your third-party, XML-based PC print program. For the Program Location for BIAF, put the location of `AddToQueue.exe` using the full path:

`C:\BIAF\BIAFLABEL\AddToQueue.exe`

5 In the Program Parameters field, enter `preview` to preview the file before printing.

To print labels:

1 Open your label printing tool from an icon or an executable in the label printing tool's folder.

The Label Printer opens.

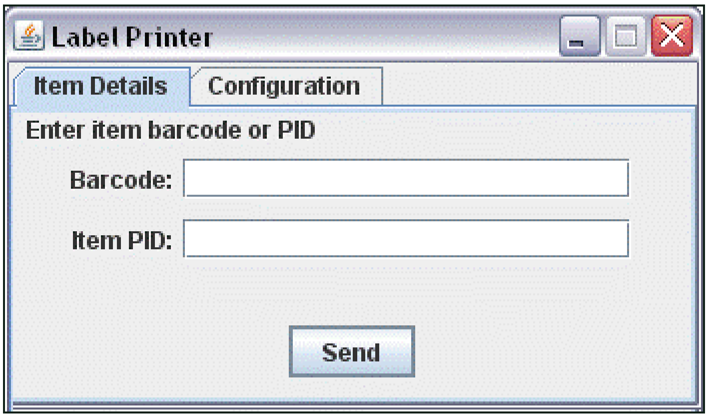


Figure 576: Item Details

2 Wand or enter either an item barcode or an item ID (PID).

3 Click **Send**.

After sending the barcode or item ID, the client application triggers an Alma Web service. The Web service returns the item information in XML format. Then the client application does one of the following:

- Activates a configurable third-party, PC XML-based print solution (such as BIAF) and sends the XML as input to that third-party solution
- Places the XML on a client-side directory

Configuring Call Number Parsing

PERMISSIONS:

To configure call number parsing, you must have one of the following roles:

- Cataloging Administrator
- General System Administrator

Alma Resource Management provides options for call number parsing when libraries need to create labels for physical items.

Configure call number parsing from the Call Number Parsing mapping table (**Resource Management > Resource Configuration > Configuration Menu** then

then select **Call Number Parsing** from the **General** section on the Configuration page).

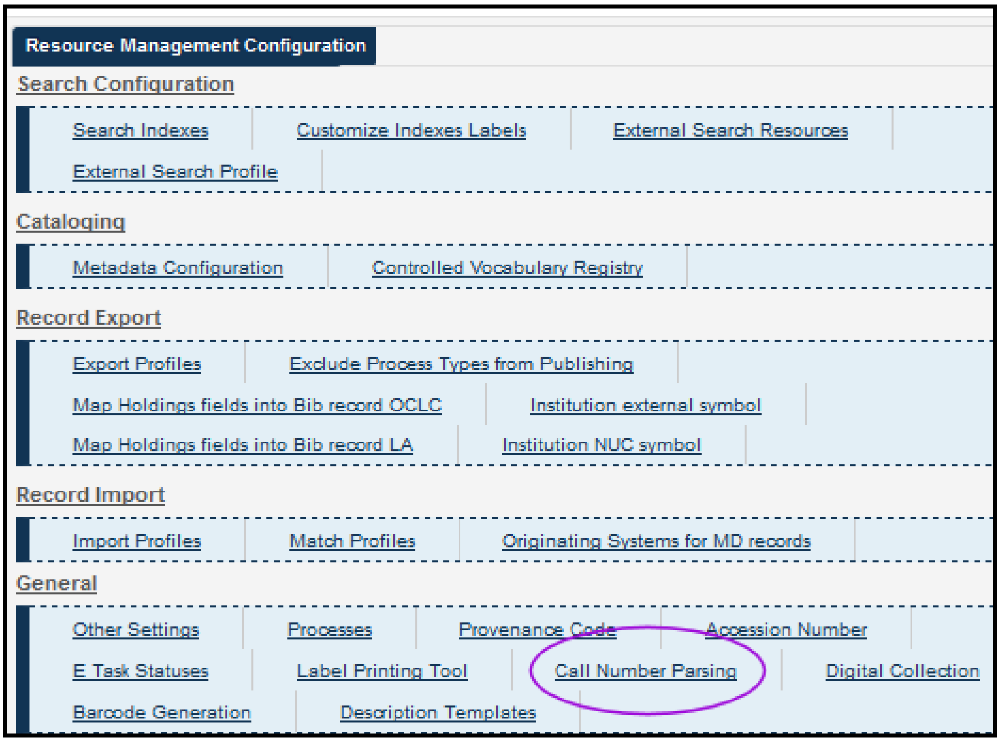


Figure 577: Call Number Parsing Configuration

This section describes:

- **Viewing Call Number Parsing** on page **715**
- **Adding, Editing, and Deleting Call Number Parsing** on page **717**
- **Call Number Parsing Options** on page **717**

Viewing Call Number Parsing

To view call number parsing, navigate to the Configuration page (**Resource Management > Resource Configuration > Configuration Menu**) and select **Call Number Parsing** from the **General** section.

The Call Number parsing link opens the mapping table for call number parsing options.

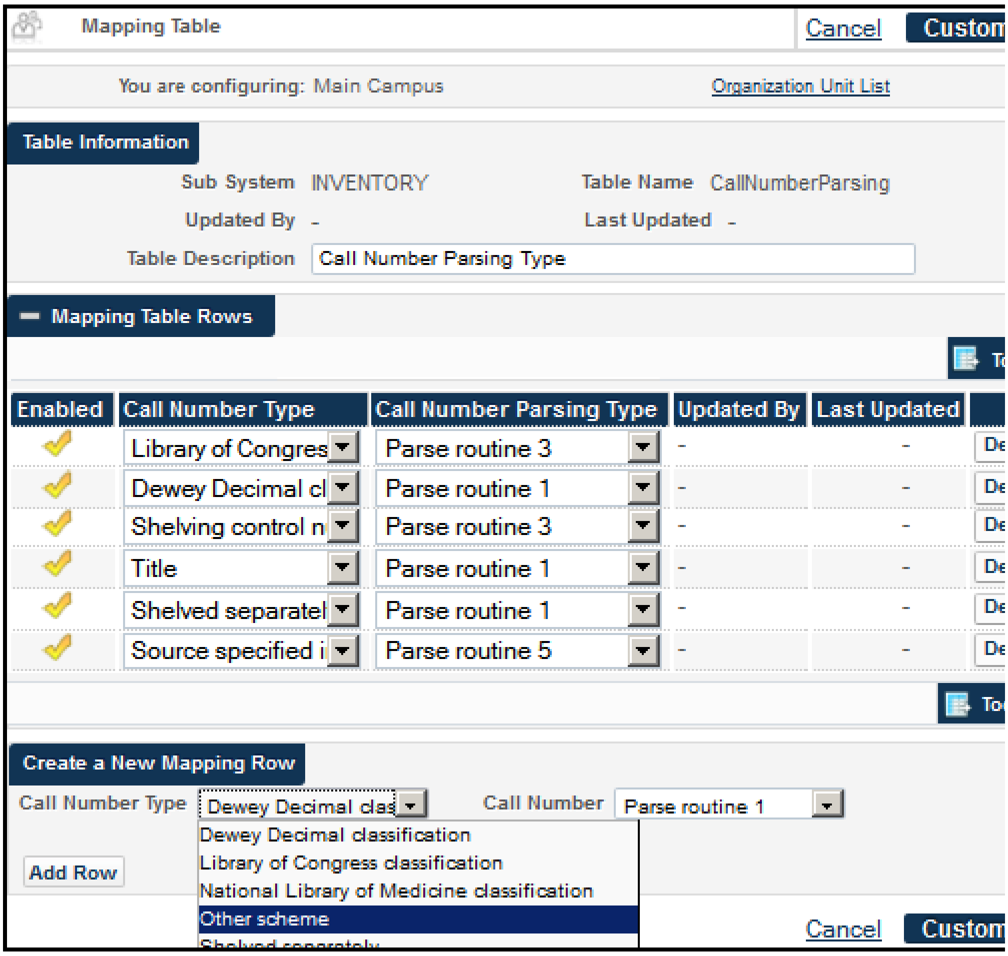


Figure 578: Mapping Table Page – Call Number Parsing

The mapping table page displays the following information for each row.

Table 85. Call Number Parsing Fields

Name	Description
Enabled	A yellow check mark indicates that the row is in use, a clear check mark indicates that the row has been disabled. Click the check mark to toggle.
Call Number Type	The type/format of the call number being assigned the parsing method.
Call Number Parsing Type	The way the call number is split or parsed when printed for a label. Nine methods are available.
Updated By	The user who last updated the mapping row.

Table 85. Call Number Parsing Fields

Name	Description
Last Updated	The date and time of the last update to the mapping row.

Adding, Editing, and Deleting Call Number Parsing

Call number parsing routines can be added to call number types, edited from their current assigned call number types, or deleted from their assigned call number types.

To add a call number parse routine:

1. From the Mapping Table page for call number parse options (**Resource Management > Resource Configuration > Configuration Menu** > **Call Number Parsing**), in the Create a New Mapping Row section, select a call number type that you want to associate with a parse routine, and then select the parse routine you want to associate with that call number type.
2. Click the **Add Row** button below your selections.

   The new row is added to the existing mapping rows in the table.
3. To save the mapping, click the **Customize** button.

   The system creates the association you specified.

To edit or delete an existing call number parse routine:

1. From the Mapping Table page for call number parse options (**Resource Management > Resource Configuration > Configuration Menu** > **Call Number Parsing**), locate the row you want to edit or delete in the Mapping Table Rows section.
2. To edit a parsing association, use the drop-down selections for Call Number Type or Call Number Parsing Type to make the changes you want.

   To delete a mapping, click the **Delete** button of the row of the mapping you want to delete.
3. Click the **Customize** button to save your changes.

Call Number Parsing Options

Call number parsing routines are system-defined and cannot be edited by users. Users select one of the following parsing routines.

Table 86. Parsing Routines

#	Description
1	Logic: ■ 5 lines maximum; if there are more than 5 lines, do not split the last part ■ 8 characters per line maximum ■ Split the call number at spaces ■ Split the call number at the opening parenthesis (■ Split the call number on a period if the line is longer than 5 characters (except parenthesis) Examples: ■ Call number = QC 300 G662(9.03) F749(.03) +2 ■ Label printed: QC 300 G662 (9.03) F749 (.03) +2 ■ Call number = CQ 9101 T39.994 ■ Label printed: CQ 9101 T39 .994 ■ Call number=CM 1000 E61 -3,3,2+2 ■ Label printed: CM 1000 E61 -3,3,2+2

Table 86. Parsing Routines

#	Description
2	Logic: ■ 3 lines maximum; if there are more than 3 lines, do not split the last part ■ Split the call number at spaces Examples: ■ Call number = 9.6 RUMÄ Roma ■ Label printed: 9.6 RUMÄ Roma ■ Call number = 9.2.23.5 FORT ■ Label printed: 9.2.23.5 FORT
3	Split by a space: ■ Splits the call number at spaces and subfield i. ■ If the character ^ is present in the call number, it is converted to a space but does not break at that point. Example: ■ Call number = $$hG635.H4$$iA3 1989^a ■ Label printed: G635.H4 A3 1989 a

Table 86. Parsing Routines

#	Description
4	Split by a space and a period: ■ Splits the call number at spaces, periods, and subfield i. ■ If the character ^ is present in the call number, it is converted to a space but does not break at that point. Example: ■ Call number = $$hG635.H4$$iA3 1989^a ■ Label printed: G635 .H4 A3 1989 a
5	Split by a space and classification: ■ In addition to parse routine 4, breaks between the letter and number components of the classification part of the call number (even if there is no space) and breaks on a decimal preceding a letter (even if it is not preceded by a space). Example: ■ Call number = $$h KJV444.21804 A7 $$i L63 1805 ■ Label Printed: KJV 444.21804 A7 L63 1805

Table 86. Parsing Routines

<table>
<tr><th>#</th><th>Description</th></tr>
<tr><td>6</td><td>Split by a space, classification, and limit length:
■ Adds to parse routine 5 (split by a space and classification). When a line ends up longer than eight characters, it splits on a "."
Example:
■ Call number = $$h KJV444.21804 A7 $$i L63 1805
■ Label Printed:
KJV
444
.21804
A7
L63
1805</td></tr>
<tr><td>7</td><td>Split into the first 3 letters, then the rest; letters and numbers are split at the beginning of the call number, even if there is only one letter; a 2nd period causes a split regardless of whether there is a character after it or of the length of the line (if not broken).
Example:
■ Call number = HS RA44050B .5.T46.7.8.9.10.11.12.13.14.15 E47 2013
■ Label printed:
HS
RA
44050B
.5
.T46.7.8.9.10.11.12.13.14.15
E47
2013</td></tr>
</table>

Table 86. Parsing Routines

<table>
<tr><th>#</th><th>Description</th></tr>
<tr><td>8</td><td>Splits the call number at spaces, periods, and subfield i.
If the character ^ is present in the call number, it is converted to a space but does not break at that point.
If the number of digits after the period is more than 4, break as follows:
5 = 3, 2
6 = 3, 3
7 = 4, 3
Example:
Call number = 363.7387403 E564
Label printed:
363
.7387
403
E564</td></tr>
<tr><td>9</td><td>For the Superintendent of Documentation (SuDoc) classification system
Used primarily for portrait-oriented spine labels and does the following:
Inserts a line break after the first colon.
Replaces each slash following the colon (not before the colon) with a line break.
Examples:
Call number = HE 20.6520/2: AC9/2
Label printed:
HE 20.6520/2:
AC9
2
Call number = HE 20.6520/2: 17
Label printed:
HE 20.6520/2:</td></tr>
</table>

Table 86. Parsing Routines

#	Description
10	■ For the Superintendent of Documentation (SuDoc) classification system ■ Used primarily for landscape-oriented spine labels and inserts a line break after the first colon. Examples: ■ Call number = HE 20.6520/2: AC9/2 ■ Label printed: HE 20.6520/2: AC9/2 ■ Call number = HE 20.6520/2: 17 ■ Label printed: HE 20.6520/2: 17
11	■ Splits the call number at space, comma, semi-colon, and plus sign Example: ■ Call number = M780.92,P175 1;F ■ Label Printed: M780.92 P175 1 F

Configuring the Barcode Generation Method

PERMISSIONS:

To configure the barcode generation method, you must have one of the following roles:

- Repository Administrator
- General System Administrator

The barcode is a unique identifier (at the institution level) given to each item. The institution can use the Barcode Generation Configuration page (see **Figure 579**) to define which of the following barcode generation routines is used to automatically generate barcodes when a barcode value is empty:

- **None** – No barcode is generated automatically.

- **Prefix + sequence** – This validates that the barcode starts with the value specified in the Prefix field (see instructions below) followed by a number.

Each barcode is validated for uniqueness, as follows:

- **Valid value** – If the barcode has a value and it is unique, the barcode format is validated as described below.
- **Not valid value** – If the barcode format is not valid, a warning message is generated; and the item's record is not saved. However, if the user confirms saving the item in the Metadata Editor, it is saved.
- **Validation at import** – When an item is imported, it is created/saved and any resulting validation warning messages are stored in the import report.

The list of all the barcode format validation routines supported by Alma are saved in a mapping table and maintained by Ex Libris for institutions. The validation routines can be enabled or disabled. The list of enabled validation routines are scanned until the barcode is found valid, or there are no more entries in the list.

NOTE:
If barcodes without values are allowed, an empty value is not validated for format or uniqueness.

To configure the barcode generation method:

1. On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Barcode Generation** in the **General** section.

   The Barcode Generation Configuration page opens.

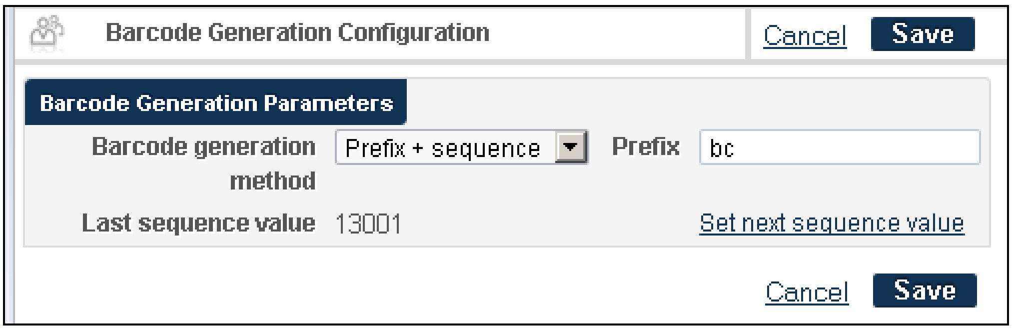


Figure 579: Barcode Generation Configuration Page

2. Specify the following fields:
   - **Barcode generation method** – Initially, this field is configured by Ex Libris Professional Services during the implementation phase. Optionally, you can change the method over time.

- **Prefix** – Use this field to define the prefix used (any string) when the barcode generation method selected is **Prefix + sequence**.
- **Last sequence value** – This is a view-only field. It displays the last assigned barcode value. This value can be changed by using the **Set next sequence value** option.
- **Set next sequence value** – Click this link to open the Set Next Number Value dialog box and enter a sequence value. This value must be unique within the sequence and higher than the last sequence value.

Figure 580: Set Next Sequence Value Dialog Box

3 Click **Save**.

Configuring Description Templates

PERMISSIONS:

To configure the description templates, you must have one of the following roles:

- Repository Administrator
- Catalog Administrator
- General Administrator

This section describes how to configure a template to be used when generating an item description based on information that you enter in the ENUM/CHRON Information tab of the Physical Item Editor page. For more information, see **Using the Repository Search Results List** on page **35** and the **Receiving Physical Material** section of the *Alma Acquisitions Guide*.

You configure description templates from the Description Template Setup Rules page, which you access by selecting **Resource Configuration > Configuration Menu** from the **Resource Management** menu, and then selecting **Description Templates** from the **General** section on the Configuration page.

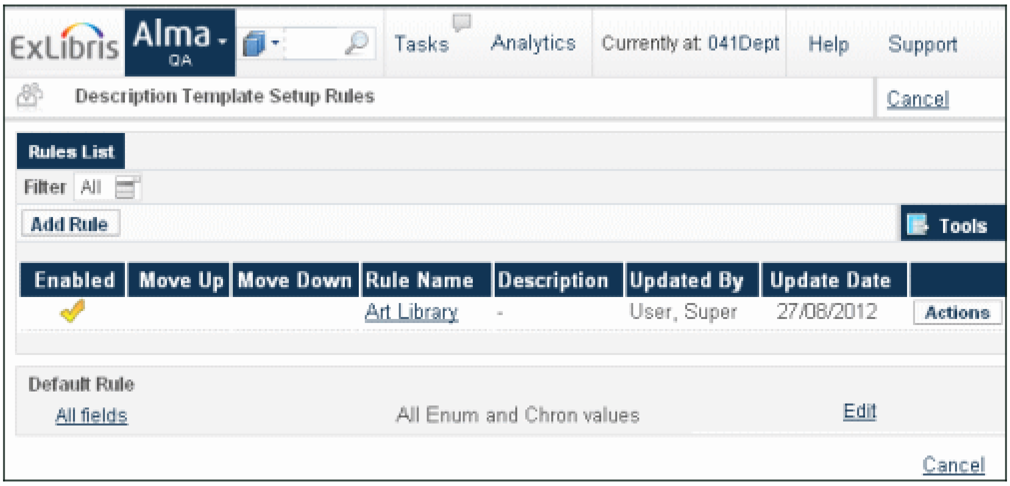


Figure 581: Description Templates

The following actions can be performed on this page:

- Adding a description template rule (see **Adding Description Template Rules**)
- Editing a description template rule (see **Editing a Description Template Rule** on page 728)
- Duplicating a description template rule (**Actions > Duplicate** and edit the relevant fields)
- Deleting a description template rule (**Actions > Delete**)

Adding Description Template Rules

You can add a description template rule. The rules that you define apply to all the libraries within the institution.

To add a description template rule:

1 On the Description Template Setup Rules page, click the **Add Rule** button. The Description Template Setup page opens.

NOTE:

If you want to create a copy of an existing description template rule, select **Actions > Duplicate**. Once you have copied the description template, you can modify it as needed.

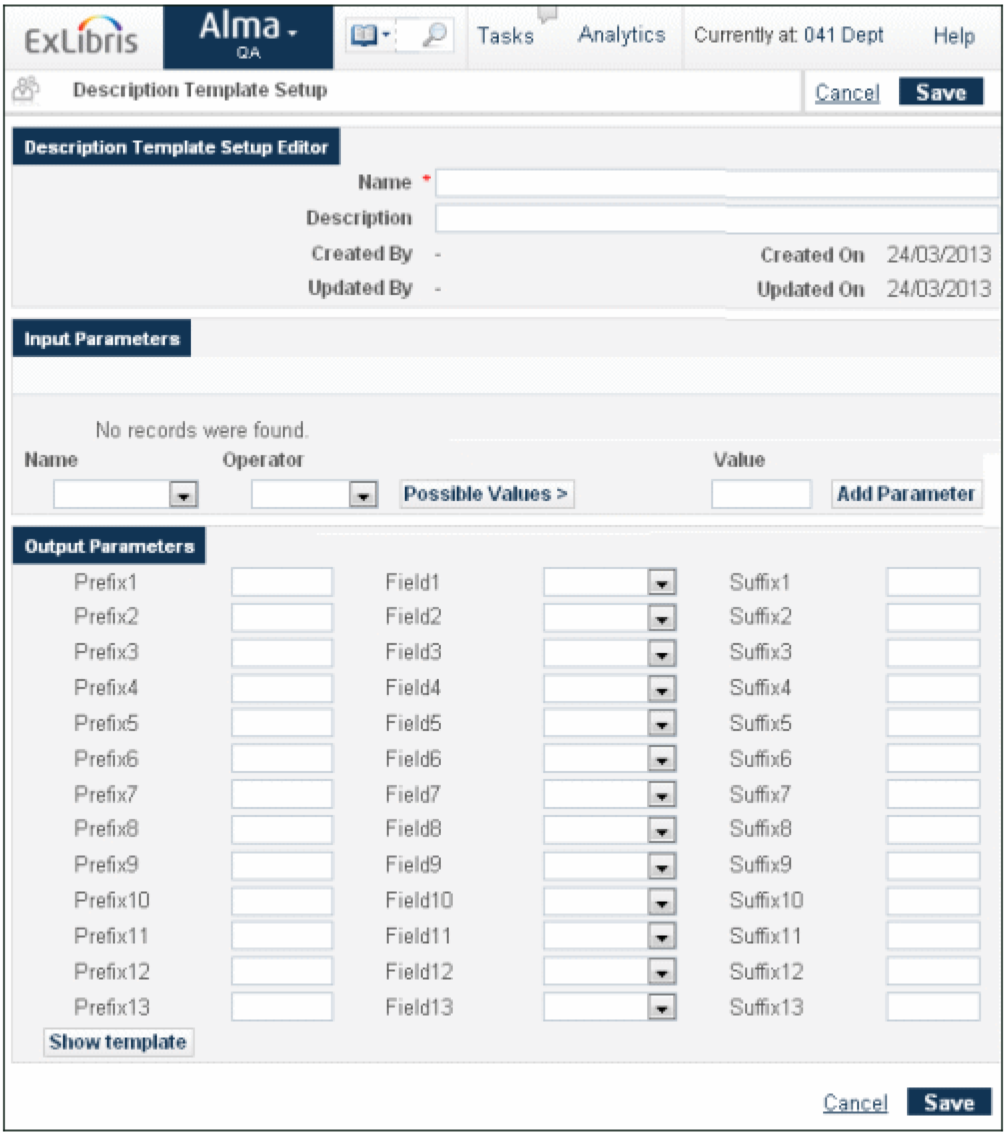


Figure 582: Description Template Setup Page

2. Under **Description Template Setup Editor**, enter a name and description of the description template.
3. Under **Input Parameters**, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *Library=Art Library, EnumA=Vol. 1, ChronI=2012*. For an explanation of the **Enum** (Enumeration) and **Chron** (Chronology) parameters, see **Table 6** in the *Alma Acquisitions Guide*.
4. Click **Add Parameter**. The set of input parameters is added to the list of parameters for the description template rule.

5 Repeat the previous two steps to add all of the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled in order for the rule to be applied. For multiple description templates to work, every rule must have input parameters.

6 Under **Output Parameters**, enter the following:

a The prefix that you want to appear before the field.

b The field for which you want to have a prefix and suffix displayed.

c The suffix that you want to appear after the field.

NOTE:
If you want to have a space before or after a prefix, leave a space before or after the prefix that you enter in the prefix field.

7 Click **Save** to store the new rule.

8 If you have defined more than one rule, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important since the system applies the first (and only the first) appropriate rule. If no appropriate rule is found, the system uses the default rule.

NOTE:
The Enabled column is not functional. All columns listed are enabled.

Editing a Description Template Rule

You can edit description template rules.

To edit a description template rule:

1 On the Description Template Setup Rules page, select **Actions > Edit** for the specific rule you want to edit. The Loan Limit page opens.

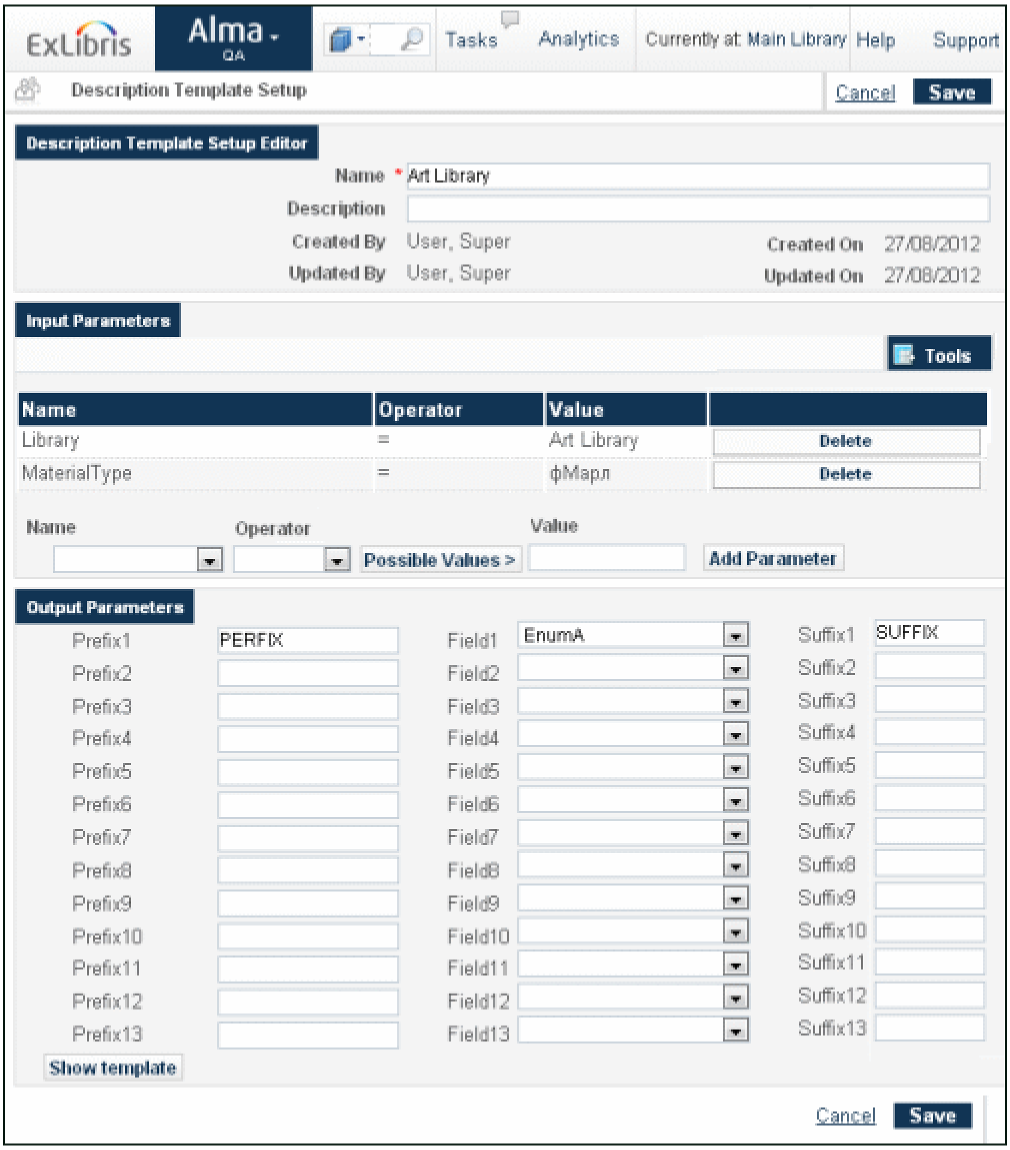


Figure 583: Edit Description Templates Page

2 Modify the rule name and description as required.

NOTE:

You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.

3. Click **Delete** for the specific set of input parameters record you want to delete.
4. Add a new set of input parameters as described in **Adding Description Template Rules** on page **726**.
5. Under **Output Parameters**, enter the following:
   a. The prefix that you want to appear before the field.
   b. The field for which you want to have a prefix and suffix displayed.
   c. The suffix that you want to appear after the field.
6. Click **Save** to store your changes to the description template rule.

NOTE:
For information on how to display an enumeration level b value as text in the item description, see the document *How to Display an Enumeration Level b Value as Text in the Item Description*.

Configuring Inventory Available For Management Groups for Multicampus Environments

PERMISSIONS:

The following roles can configure campus/library inventory management network groups:

- Repository Administrator
- General System Administrator

The following role can define availability for electronic collections and/or portfolios:

- Electronic Inventory Operator

Often, access to electronic resources is restricted to certain campuses and/or libraries within an institution and is not available to all the patrons across the institution. In order to address this requirement to manage the availability of electronic resources per campus and/or library, Alma provides configurable inventory (Available For) management group settings.

NOTE:
If resources are available for all patrons across the institution, there is no need to set up management groups or Available For definitions since, by default, active resources are available for all patrons.

A group represents a set of campuses and/or libraries for which you want to manage electronic resources as a group. Group setting characteristics or considerations include the following:

- One or more campuses and/or libraries may be defined in a single group
- One campus and/or library can be a part of multiple groups
- Settings should be defined in a manner that eases the management and activation of electronic resources

  Example:

  An institution may have the following campuses that purchase and manage electronic resources independently:

  - North Campus
  - South Campus
  - Main Campus
  - City Campus

  Each of these campuses is defined as a separate group.

  In addition, there are certain electronic resources that the North Campus and the Main campus purchase and manage together. For this scenario, you may want to configure the North and Main Campus as a single group if this configuration makes it easier for you to manage/limit access to electronic resources. Otherwise, you can separately specify the North Campus group and the Main Campus group to an electronic resource and achieve/provide the same level of access to the patrons.

  These groups are assigned to electronic resources using Add Settings for Group (refer to **Adding Group Settings to Electronic Resources** on page **280**). Also, refer to **Adding/Editing IP Definitions for a Library** on page **196** in the *Alma Administration Guide* that is related to associating/providing access to library resources.

With the Inventory Network Groups configuration options, you can define groups that you can use to manage access to electronic resources. You can define campuses and/or libraries within a specific group for sharing electronic resources. Refer to the steps below for configuring management groups.

NOTE:

In order for Inventory Network Groups to display as a configuration option in the Resource Management configuration menu, someone with the General System Administrator role needs to set the parameter value to `true` for the `multi_campus_inventory_management` parameter in the mapping table located in **Administration > General Configuration > Configuration Menu > General Configuration section > Other Settings**.

Adding Available For Inventory Management Groups

Use the following procedure to add inventory (Available For) management groups.

To add an inventory (Available For) management group:

1. On the Inventory Available For Management Groups page (**Resource Management > Resource Configuration > Configuration Menu > General > Inventory Network Groups**), click **Add Group**. The Add Group dialog box opens.
2. Assign a name to the group, optionally enter a description, and click **Add and Close**.

Figure 584: Add Group

The Inventory Available For Management Groups page displays the list of groups.

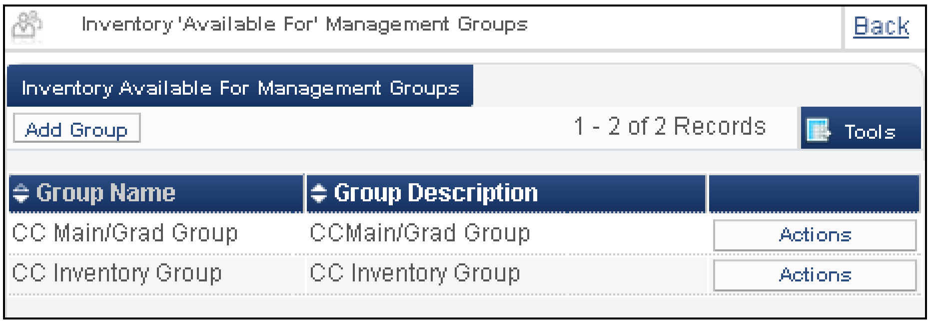


Figure 585: Group Added to the List

3. Select **Actions > Edit** for the group you are adding. The Inventory Management Group Details page is displayed.

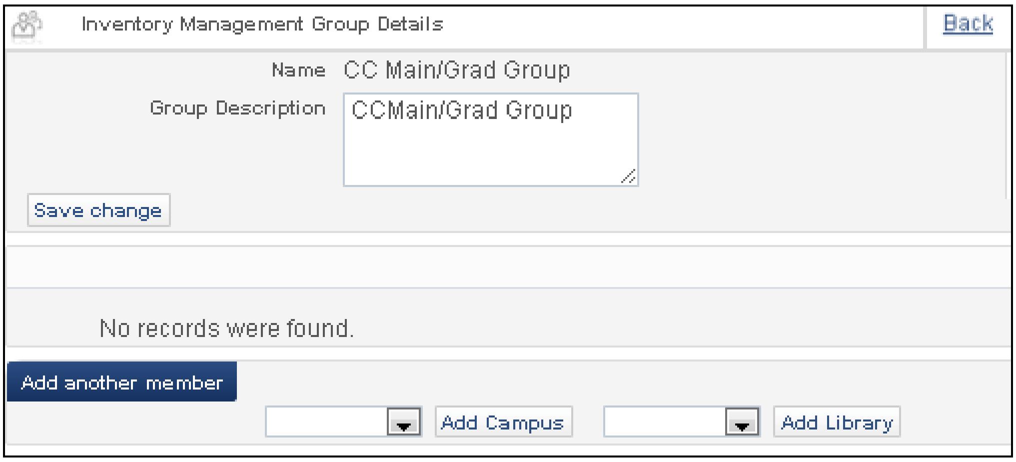


Figure 586: Inventory Management Group Details Page

4 Select one of the previously defined campuses and/or libraries and click **Add Campus** and/or **Add Library**. The campuses/libraries are added to the list of group members.

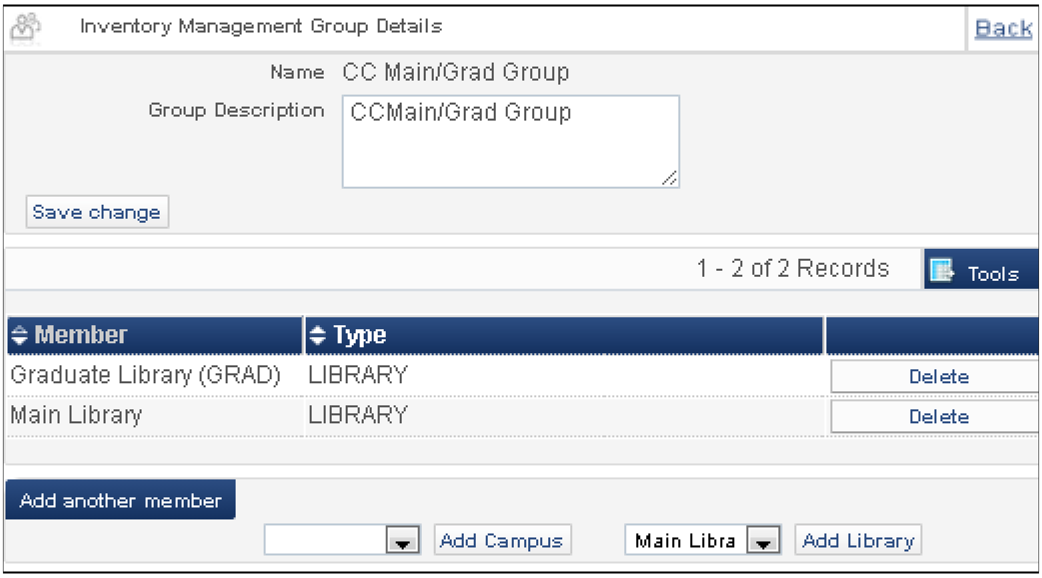


Figure 587: Group List

5 Continue adding campus/library members until the group is complete. When you are finished, click **Back** to return to the Inventory Available For Management Group Details page.

Deleting Available For Management Groups

Use the following procedure to delete inventory Available For management groups.

To delete an inventory Available For management group:

1. Access the Inventory Available For Management Groups page (Resource Management > Resource Configuration > Configuration Menu > General >Inventory Network Groups).

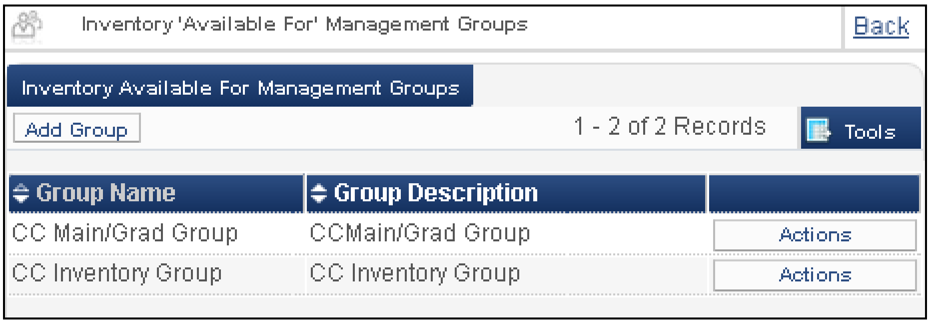


Figure 588: Inventory Available For Management Groups Page

2. Select **Actions > Delete** for the group your want to delete.

IMPORTANT:

It is strongly recommended that you do not delete Available For groups after they are set and associated with inventory. If you delete an Available For group that is connected to inventory, the relevant Available For setting in the inventory is also deleted. Available For group association with inventory is done via an internal ID; and once it changes (such as when groups are deleted), the association will not be kept. Refer to **Adding Group Settings to Electronic Resources** on page **280** for more information regarding associating Available For groups with inventory.

Configuring Physical Item Sort Routines

PERMISSIONS:

The following role can configure physical item sort routines:

- General System Administrator

The Physical Item Sort Routines configuration options provide greater flexibility for determining the sort order display of physical items in the Receive Items List (**Acquisitions > Receiving and Invoicing > Receive > Continuous tab**, select

Actions > Manage Items), the staff search physical items list, and/or the Get It tab.

These configuration options enable you to create your own custom sort routines in addition to the default sort routines provided with Alma.

The sort routines display in a drop-down list that allows you to dynamically switch from one sorted view to another. See below for examples of sort routines.

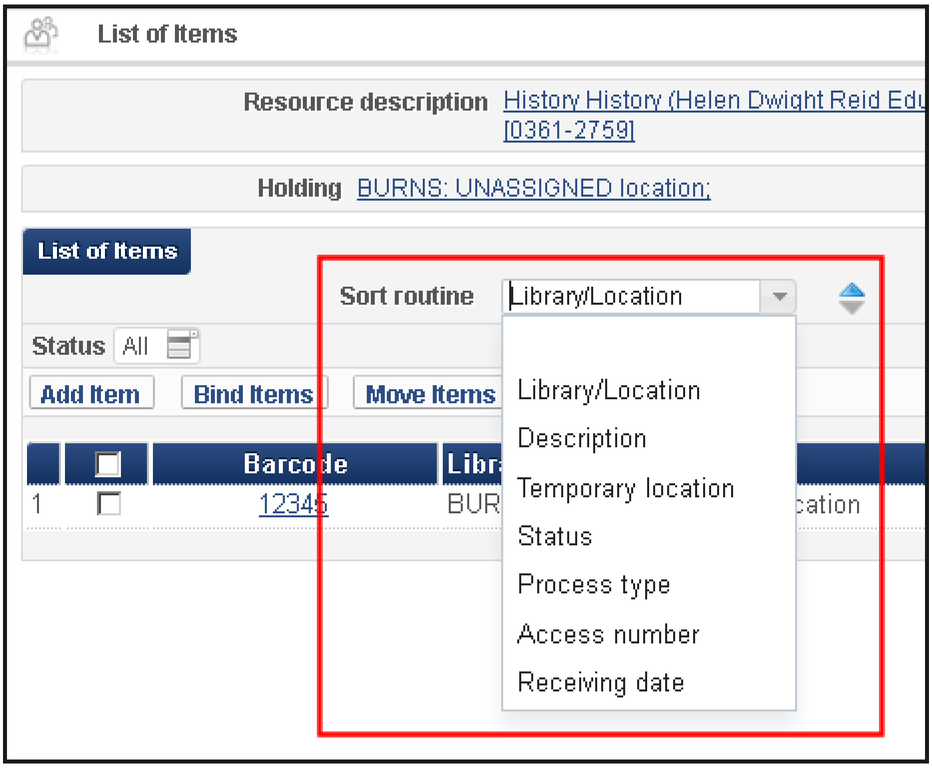


Figure 589: Sort Routines for the Staff Search Physical Items List

To the right of the drop-down list are up/down arrows that allow you to dynamically switch between ascending and descending order for the sort routine that you have selected.

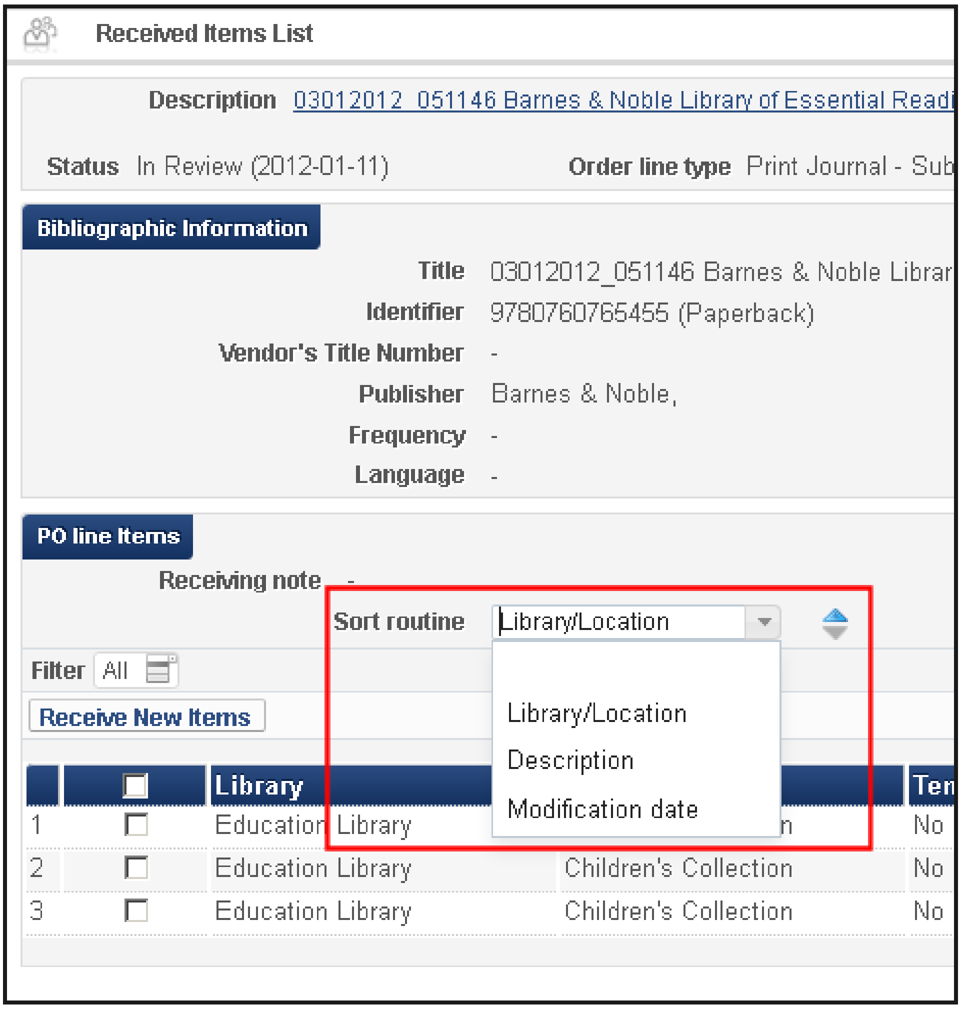
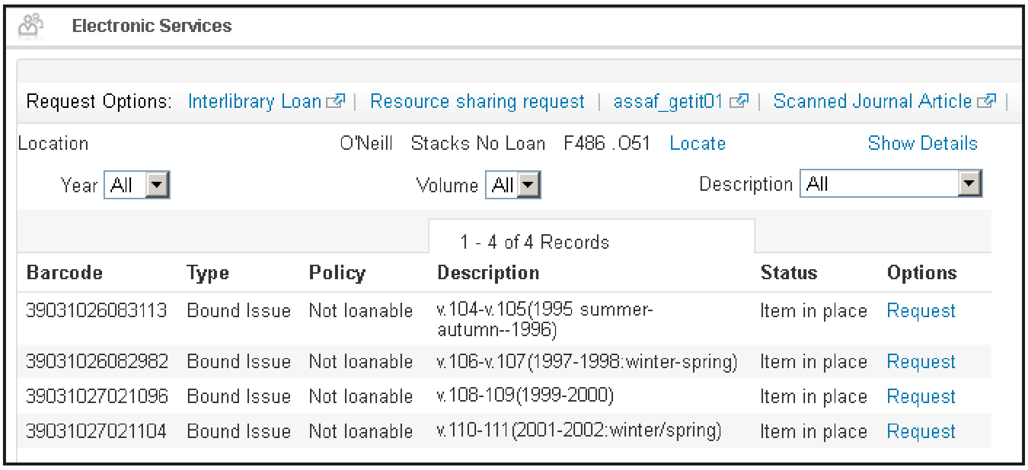


Figure 590: Sort Routines for Received Items List



Barcode	Type	Policy	Description	Status	Options
39031026083113	Bound Issue	Not loanable	v.104-v.105(1995 summer-autumn--1996)	Item in place	Request
39031026082982	Bound Issue	Not loanable	v.106-v.107(1997-1998:winter-spring)	Item in place	Request
39031027021096	Bound Issue	Not loanable	v.108-109(1999-2000)	Item in place	Request
39031027021104	Bound Issue	Not loanable	v.110-111(2001-2002:winter/spring)	Item in place	Request

Figure 591: List of Items on Get It Tab (Displayed on the Alma Electronic Services Page)

VIDEO:

For more information on item sort routines, see the *Item Sort Routines* video (7:34 mins).

To configure item sort routines:

1. On the Sort Routine List page (R**esource Management > Resource Configuration > Configuration Menu > General > Physical Item Sort Routines**), click **Add Sort Routine**. The first step of the sort routine wizard opens.
2. Enter the name and description for the sort routine and click **Next**. Step 2 of the sort routine wizard opens.
3. Select the sort order (ascending or descending) for this routine.
4. Select the fields by which you want this routine to sort.

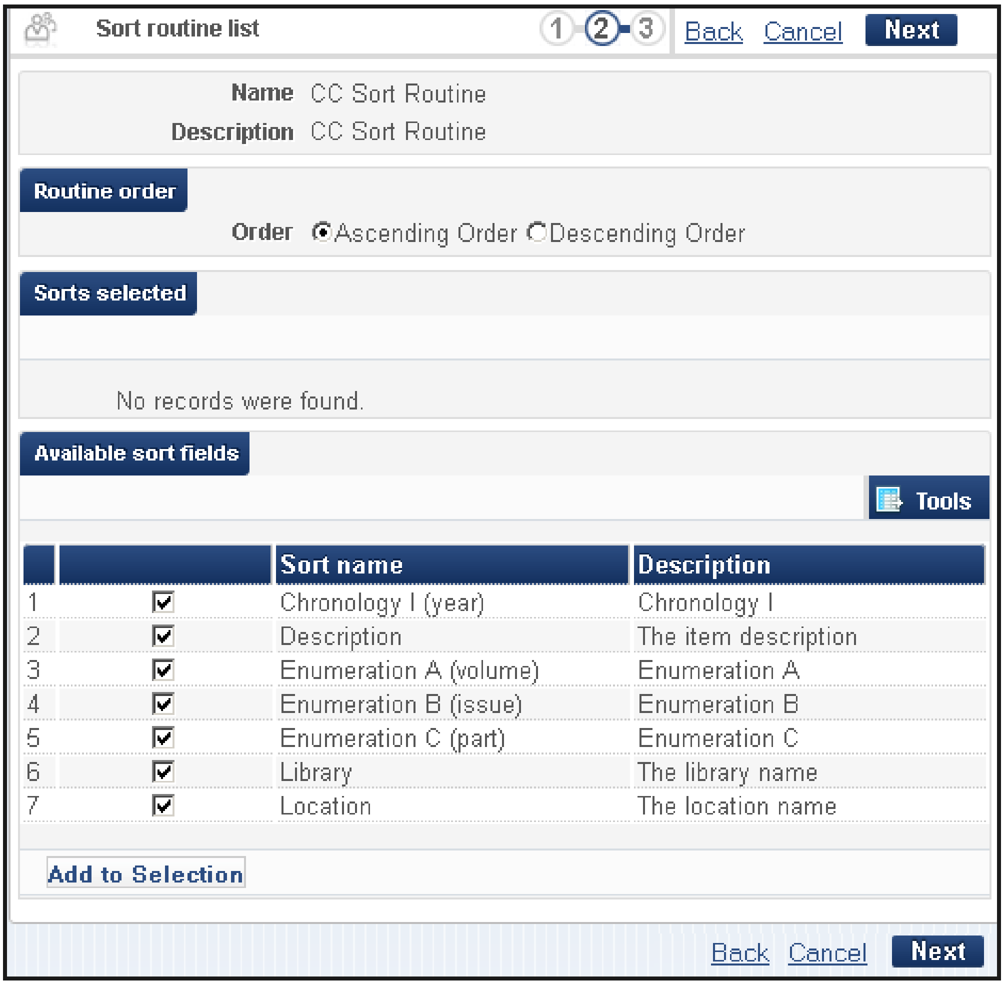


Figure 592: Select Fields on Which to Sort

5 Click **Add to Selection**.

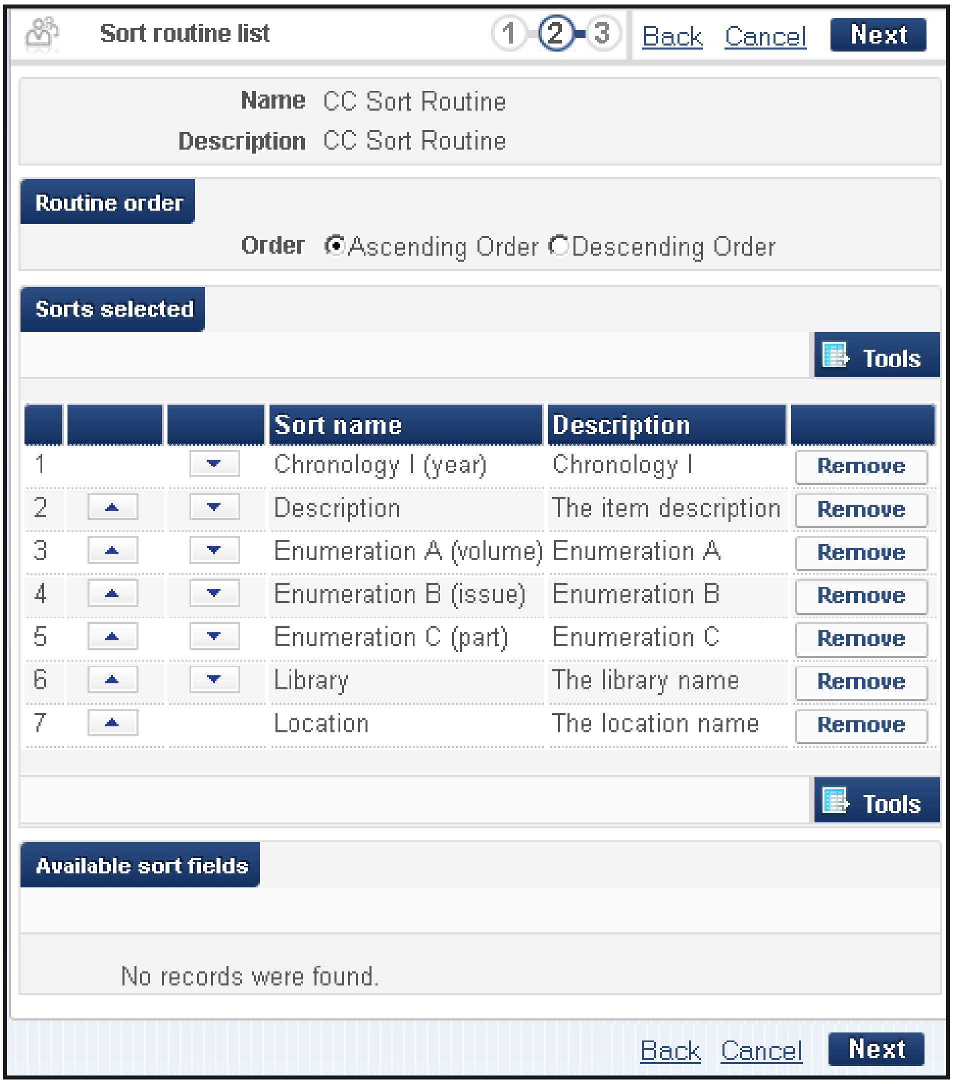


Figure 593: Sort Fields Selected

6 Use the up/down arrows to the left of the selected fields to identify the order in which you want this fields sorted and click **Next**. Step 3 of the sort routine wizard opens.

7 Select the item list in which you want this sort routine to be available and select whether it should be the default sort routine to be used.

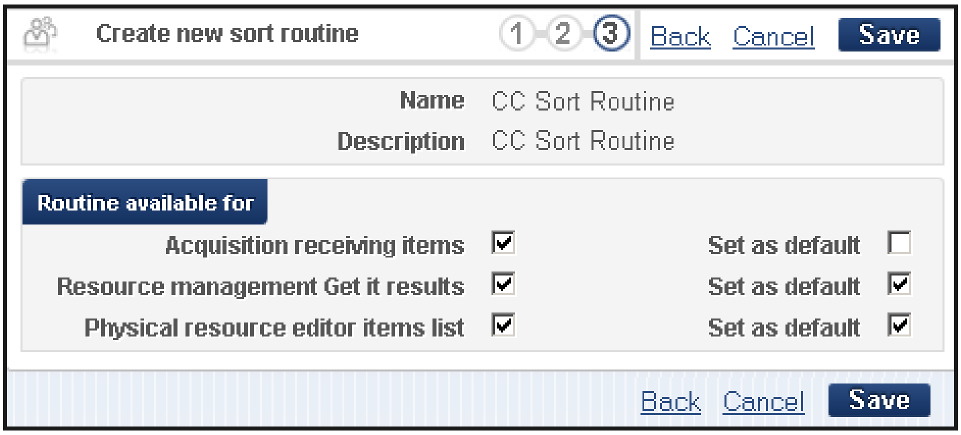


Figure 594: Sort Routine Available For Selection

8 Click **Save**. The new sort routine is added to the list of routines on the Sort Routine List page.

To edit an existing sort routine, select **Actions > Edit** for the routine on the Sort Routine List page. To delete a sort routine, select **Actions > Delete**.

Configuring Physical Item Material Type Descriptions

PERMISSIONS:

The following roles can configure item material type descriptions:

- Cataloging Administrator
- General System Administrator

You can configure the descriptions of the material types that are displayed from the **Material type** drop-down list. This drop-down list appears in many pages in Alma—for example, in the Physical Item Editor when editing a physical item. In addition, the change to the material type description appears in the Primo View It and Get It tabs.

To customize the physical item material type descriptions:

1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click

Physical Material Type Descriptions under **General**. The code table of the Physical Material Type opens.

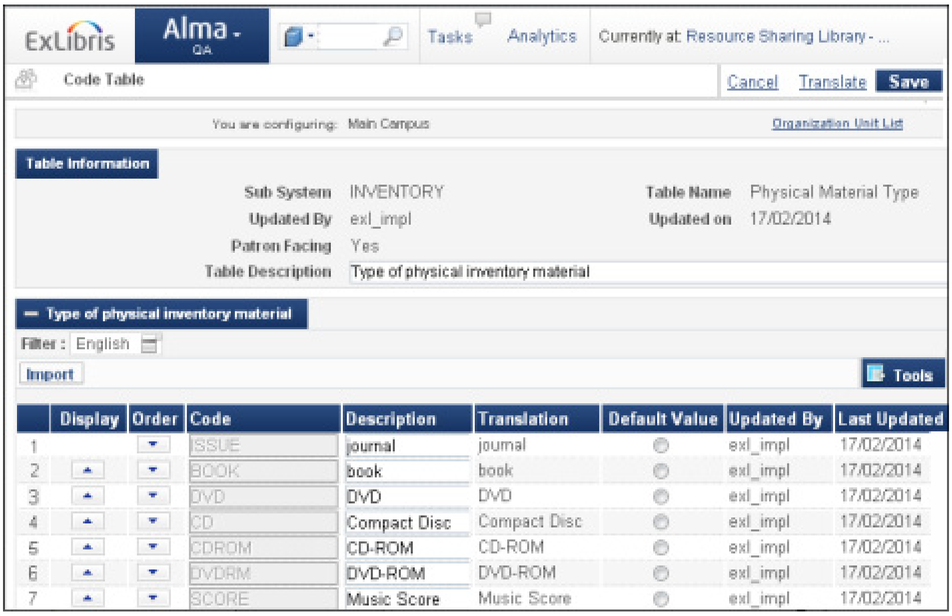


Figure 595: Physical Material Type Descriptions

2 Edit the descriptions of the material types in the **Description** field.

3 Use the up and down arrows to change the order in which the material type will be displayed in the **Material type** drop-down list.

4 Click **Save**.

All **Material type** drop-down lists in Alma (for example, in PO lines or the Physical Item Editor) will now display the customized values.