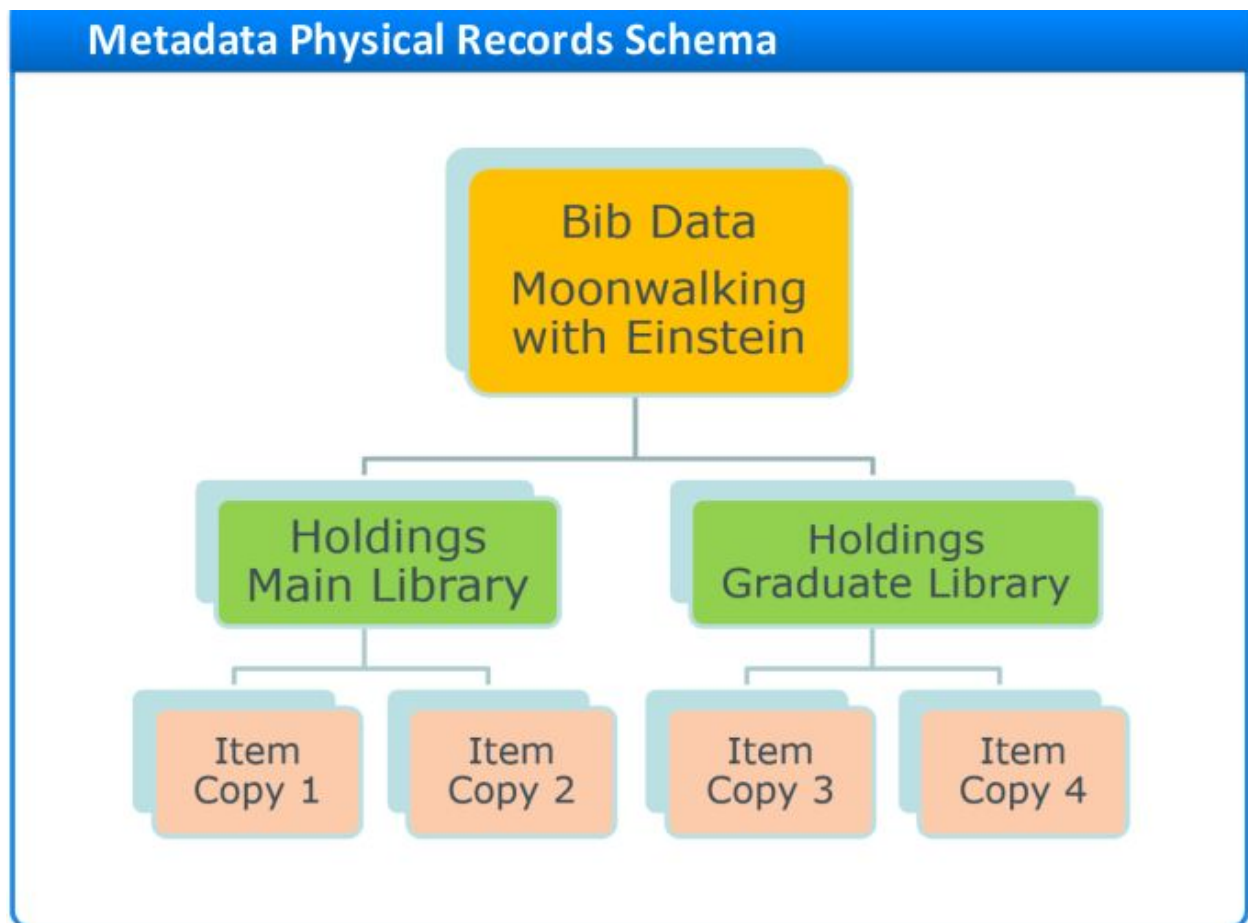


Metadata Editor and Templates

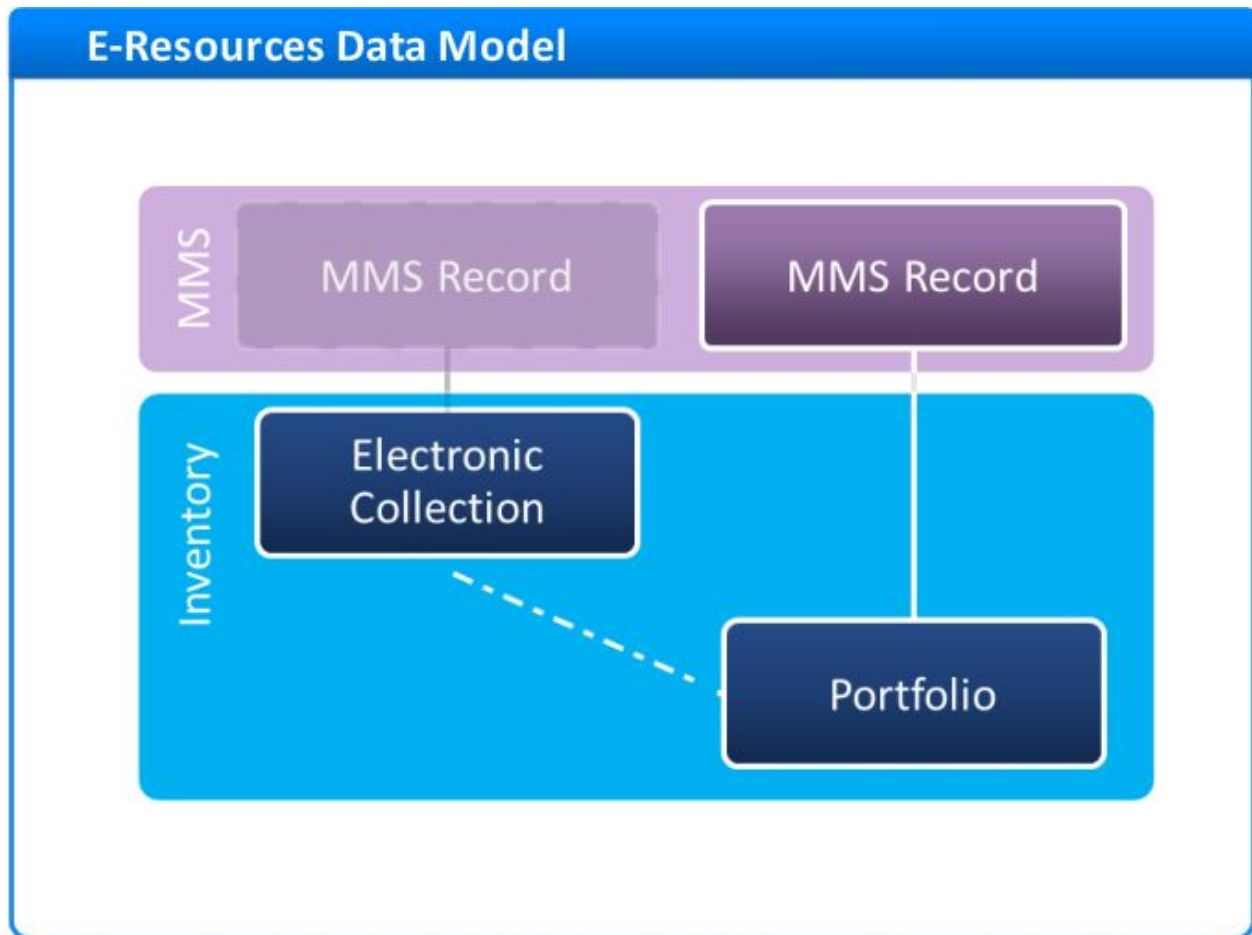
General Metadata Editor (ME) Notes:

- Options are greyed out when they do not apply to the record being edited or if no record is open in the metadata editor.
- As soon as you begin editing a record, the record is locked until you release the record. Others may not edit records you have locked. You'll be able to see who has locked a record in the repository search brief results.
- As you are editing a record, Alma regularly saves records in draft mode (approximately every 30 seconds), so if your session is disconnected, your edits will be saved
- As records are saved, validation rules will be checked and the repository will be checked for possible duplicates

Physical Items Data Model



E-Resources Data Model



File Menu

- **Delete Record:** Only possible if no inventory is attached to the bibliographic record AND if the operator has the Cataloger Extended role. Note that Network Zone records CANNOT be deleted from Northridge's Alma instance; only those with Network Zone instance access can delete records. Workflows for having NZ records deleted are TBD. If a record is in the NZ with no inventory (no holdings and no items) attached, it will not display in any Primo view, and so does not affect patrons.

Edit Menu

- **Enhance the record:** Allows you to apply normalization rules to the record.

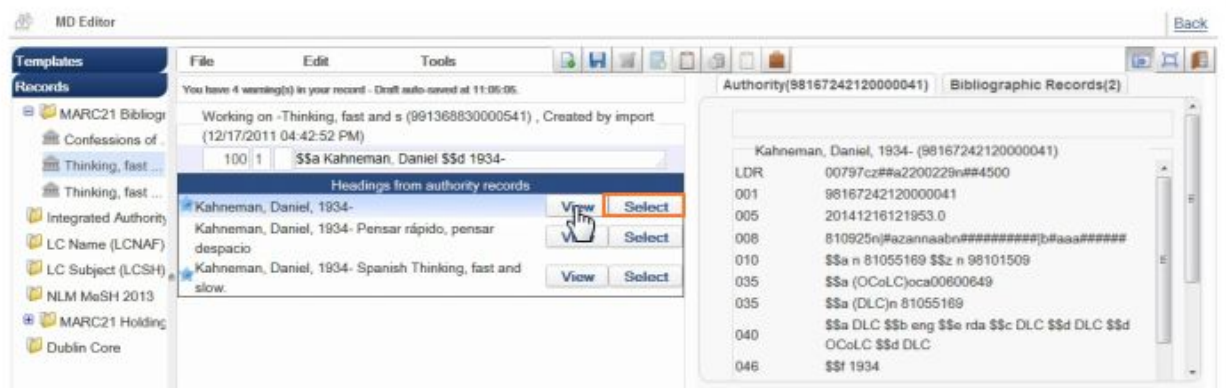
Tools Menu:

- **Searching External Resources:** Used to search OCLC within Alma.

- **View Versions:** Shows prior saved versions of the record.
- **Validate:** Shows issues with records. Two types of messages: Mandatory messages, which must resolved for the record to be saved; and Alert messages, which are for informational purposes.
- **Browse call numbers and bib headings:** Allow you to browse repository by author name, subject, series, and title
- **MARC Bibliographic:** Add holdings, add local portfolio (for electronic resources) Find matches (find duplicates); View inventory (shows items and holdings) Related records (show linked records)
- **Set Management tags:**
 - Suppress from Discovery
 - Not published to Primo
 - Export to OCLC
 - Include the record in OCLC holdings synchronization
 - Force export to WorldCat causes holdings records to be included in the next export to OCLC
 - Brief
 - Indicates the record is not complete to show that additional cataloging / processing is needed.

General Cataloging Editing Workflow:

- Search All Titles in a Repository Search or use the all titles Quick Search bar
 - Search both the NZ and the IZ
 - Select Edit to edit the MARC bibliographic record
- To edit a field in the ME, click on the field
- To add an authorized heading to a record, type at least three characters of the authors' name and press F3 to to see suggested authorities
 - Starred headings are authorized headings; non-starred entries are not authorized
 - Click the View button to examine the authority record
 - Click the Select button to link the selected authority to the record



- To show authority records already linked to a record, click the magnifying glass in front of the field. Click the magnifying glass icon to view the authority in split-screen mode

Editing records retrieved from External Search (OCLC)

- Alma ME > Tools > Search External Resources
- To discard a record you don't want to keep, release it (see Saving below)
- Form Editor: For editing Leader and control fields (001-008)
 - Edit Menu > Open Form Editor
 - Ctrl + F opens Form Editor
 - Esc key closes form editor

Saving

- To save a record permanently (not in draft mode) press Ctrl + S
- Can also save a record as a template (e.g., for cataloging a series)
- To save a record and release it for others to edit, use Save and Release (Ctrl + Alt + R)
- To release a record without saving it, File > Release
 - To Release all records, use the release all records option in the Records menu in the left panel of the ME



Add Holdings

- Tools > MARC21 Holdings > Add Holding OR Ctrl + Alt + H OR Add Holding Icon

Add Items

- After holdings are created, from the Holdings tab in view inventory > View Items > Add Item OR Press Alt + I Or Tools > MARC21 Holdings > Add Item

Add electronic inventory

- NOTE: This replaces the process of adding an 856 link to the bibliographic record. 856 links in bibliographic records do NOT create access links for users. Only portfolios can create access points for users
- To add a local portfolio, Tools > MARC Bibliographic > Add Local Portfolio

To undo all edits and start over:

- File > Reload original record
- To only undo some edits, Tools > View Versions

Templates

- Pencil icon: Alma Out-Of-The-Box template
- Institution icon: User-Created template

To use a template, click on it. Options will appear:

- New: Pushes the template to the editor pane to create a new bibliographic record
- Duplicate: Used to create a new template based on an existing template
- Properties: Determines sharing settings (shared with other catalogers, or setting the template as the default)
- Edit and Delete options are available for institutionally created templates
- Holdings record templates can be pre-populated with holdings information, such as holdings library