

Resource Management Administration, 7-25-2017

Local Search Indexes

- All local fields can be searched exclusively
- It is possible to copy data from a non-local field that isn't discretely indexed to search it exclusively using a normalization rule
- All Local fields can be added to Advanced search and/or "simple search"

External search profiles (OCLC WorldCat import)

- This will be set up system-wide (does not need to be set up by each Alma user)
- NOTE: Currently, this is working on the institution zone (IZ) level. To try this, go to Alma > Resource Management > Search External Resources. In the metadata editor, go to File > Options and change "Placement of new bibliographic records" to "Local". The CO is working on setting this up CSU-wide, but for now you can test functionality on the IZ level so that imported records will be sent to the Network Zone (NZ).
- You will also be able to use the Connexion interface to export records from Connexion and import into Alma (the way we do with Millennium now). You do not have to use the 'external search' in Alma (its search indexes are limited, so you might not use it frequently)
- When records are imported to the NZ, you must attach holdings and items for the result to be retrievable in the institution zone
- Always be sure to check the network zone ****first**** before importing a record from Connexion.

Normalization, merge methods, match methods

Process	Definition	Ill equivalent	Managed in
Normalization rules	Used to edit MARC bib or holdings records. Can be used to add, remove, or replace MARC fields. Can be used on single record or set. Uses the DROOLS programming syntax language. More information on syntax with examples available at http://bit.ly/normrules	Global Update	Metadata Editor
Merge Methods	Used to merge two records into one. Allow you to define how the records are merged (Which fields are	Load table	Metadata Editor

	protected, etc.). Merge methods are used in conjunction with import profiles, which are used for batch importing of records.		
Match Methods	Used to determine how matches are found when records are imported from external systems	Load table overlay and @Idx parameters	Existing set of match methods in Alma cannot be modified, but you can choose which match method to use by import profile

Import Profile Examples

Profile type	Definition	Use Case
Repository import profile	Used to create bibliographic records and create records for physical / electronic inventory records. Can be configured to *not* create inventory if desired	<ul style="list-style-type: none"> • Vendor provided bibliographic records • Create brief bibliographic records • Existing Alma records exported and edited in MARCEdit
New Order import profile	Used for “embedded order data” or EOD files to create PO Lines in Alma. Creates bib and inventory records	<ul style="list-style-type: none"> • Create PO lines from EOD file. Will always create new inventory
Update inventory import profile	Imports shelf-ready files and updates bibliographic / inventory records associated with an existing PO Line Can use an “ indication rule ,” which is similar in syntax to a normalization rule, determines which records will be imported. With indication rules, Imported records must match the conditions of the indication rule in order for import to occur. Records will only be imported if a matching PO Line is found	<ul style="list-style-type: none"> • Update brief records or existing records created through EOD. Will always update inventory.

- Each import profile can define normalization rules, merge methods, and match methods associated with that profile
- Can tag records to suppress from discovery or suppress from OCLC synchronization (whereby holdings set in Alma automatically attach holdings to records in OCLC)

Authorities in Alma

Authority Source	Update Frequency
Library of Congress Names and Subject Headings	Weekly
US NLM Medical Subject Headings	As updates are available
German National Library GND	Weekly
BibSys	Not being updated

Authority jobs

- **Link bibliographic headings:** searches all authority record fields and subdivisions for complete terms in bib records. If exact matches are found, fields are linked to corresponding authority. If exact matches are not found, subdivision is disregarded for matching, and a second search is done to find any remaining matches. A report is available to find records that could not be matched. Can be scheduled daily.
- **Authorities preferred term correction:** enabled when go-live. Enables preferred term correction of all records that have been linked to authority records. Can be scheduled daily. Report provides a count of headings corrected, and a count of headings where no appropriate term was found. Also includes MMSID / field changed / old and new values. Does not run retroactively - only updates when an authority record is changed [all bibs linked to this authority are updated] or a bib record is changed [and linked to authorities in the 'link bibliographic headings' job above. Can be scheduled daily.