Resource Management Quick Start Guide

This guide is designed as a launch point for common workflows related to Resource Management and Cataloging tasks. If you cannot find needed information elsewhere on the Alma section of the LTS Staff Documentation wiki or if you need additional assistance with Alma, please submit an Alma Support Ticket.

Connexion

- Connexion Configuration Settings
- Exporting from Connexion Client to Alma Using F5

Bibs, Holdings, and Items

- Creating & Updating Bib Records and Using Search External Resources (Z39.50)
- Metadata Editor (MDE): Navigation and Overview
- Holdings - Creating, Editing, and Suppressing
- Moving Holdings and Items
- Metadata Standards:
  - 33x and 007 fields in Alma bibliographic and holdings records
  - Best Practice for name access points in Alma
- Items
  - Item Statuses, Process Types, and Required Fields
  - Items - Creating
  - Items - Editing
  - Item Material Types
  - Item Policies
  - Sending items to offsite storage
Alma Resource Management - Major Differences from Aleph

Important Notes about Local Fields and Holdings Statements (Paired and Textual)

- Field 908 (was H08 in Aleph) is no longer a required field. You only need to add this field if you do NOT want holdings set in OCLC. To prevent holdings being set in OCLC, add 908 $$ap.
- Some units may continue to require 908 for statistical purposes.
- Fields 866, 867, 868 (textual holdings statements) will automatically be generated by Alma when a record is saved and there are paired enum/chron fields (863, 864, 865).
  - When enum/chron paired fields are updated and you re-save a record, Alma will regenerate the 866, 867, 868.
  - You should not modify 866, 867, 868 fields.
- This system is configured to generate these fields for the purposes of Primo display.
- Fields 966, 967, 968 are designated for use by staff for manually creating textual holdings statements (in lieu of 866, 867, 868).
  - These fields will display in Primo.
  - Aleph holdings fields 866, 867, 868 migrated as 966, 967, 968.
- Additional fields are automatically generated (and updated) when saving a holding, for the purposes of Primo display:
  - 994 : Copy of 977 Bound-with for Primo use (displays with a hyperlink for the user to click on)
  - 995 : Copy of 008 receipt status for Primo use (displays as On Order or Currently Received, when applicable)
  - Migrated data have some encoded data in this field. This should be ignored. (Data will be removed when the record is saved.)
  - 996 : Copy of 561/1 or 561/_ for Primo use (indexed and displayed when note is not marked private)
  - 997 : Copy of 541/1 for Primo use (indexed and display when note is marked as public)
- All Harvard defined fields are documented at https://wiki.harvard.edu/confluence/x/2zgWDQ

852 Changes

- For holdings field 852, we no longer having the option of leaving both indicators blank.
  - Most library/locations have been configured to have a default 1st indicator appropriate for that location.
  - If no other default has been set, the 1st indicator will default to 8.
- It is okay to leave the first indicator value even if you have no call number present. (If there is no $h/$i, no entry will appear in call number browses or shelf listing tools.). Examples:
  - 852 8# $$b SCH $$c HD
  - 852 0# $$b WID $$c HD
- Staff members can prevent unwanted text like "IN PROCESS" from 050 fields in bibliographic records from being automatically copied into 852 fields in holdings records by using the indicator of '8' in the 852 field when no real call number is available.

Authorities and Authority Control: What every cataloger needs to know

Authorities and Authority Control Task List

Every heading in Alma bib records will be run through two jobs. Both those jobs run every night on new and changed records:

1. Heading will get linked to an authority with the same string (whether that is your entity or not)
2. Heading will get flipped to the 1XX of that entity, if your string matches a 4XX

New best practice for name headings issued by Metadata Standards:

- Best Practice for name access points in Alma

New policies for local authority records:

- ITS no longer creates local authority records
- Local units are discouraged from creating local authorities
- All units, shared or local, are encouraged to create NACO records

More information: Authorities and Authority Control Task List
Additional References

- Browsing Bib Headings
- Harvard-defined MARC fields
- Guide to Entering Combining Diacritics and Symbols in Alma