

## Metadata Management, Searching

### Metadata management

#### How does Alma support cataloging in a consortial environment?

Alma is designed to allow single-site institutions and consortia to manage their catalog(s) and inventory, by providing the ability to manage local holdings and collections as well as shared resources (e.g., resources from the consortium). Resources managed within an institution can be described using either the local catalog's records, as is done in today's systems, or an institution can link its inventory records to the metadata records in the Community Zone, which eliminates the need to download these records to the local catalog.

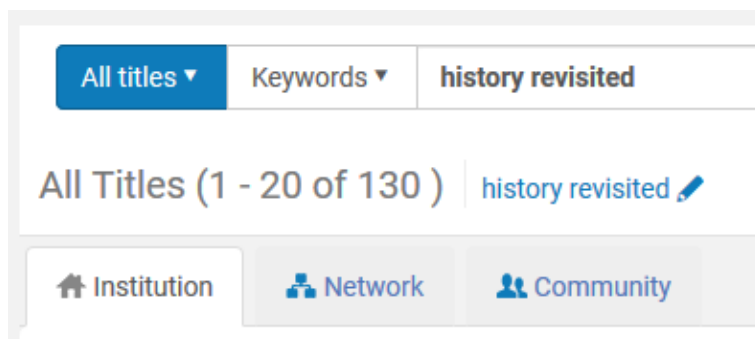
For consortial that are interested in collaborating in shared technical services Alma supports the ability to manage a shared catalog. This is done via a dedicated Network Zone which manages shared data and shared processes of the consortium. This model streamlines the workflows of the consortium because all of the members are using the same interface, processes and functionalities, thereby creating a unified working environment.

This is a more inventory-centric model, where the actual location of a bibliographic record is less important than in traditional ILS's. The benefit of this hybrid model is the ability to combine local data with shared descriptive information.

Because Alma is not limited by the need to manage all descriptive records in the local catalog, sites have flexibility in sharing records, depending on how useful the record may be to the broader community. For shared records, libraries can attach local fields that are indexed and searchable, and may be published to discovery for end users.

From a staff user perspective, searching in the catalog and inventory is integrated and seamless. When searching for a record in Alma, staff users may search in their local institution as well as in the consortium; this allows them to view other institutions' resources as well as the Network Zone catalog.

The screen shot below displays this capability:



As can be seen above, users can search their own institution, the consortium (the Network Zone) and the Community Zone shared catalog. When searching, users are able to see not only the holdings and records of another institution, but also to perform actions such as editing a shared record. This of course depends on the user's authorization.

When a user views his/her own institution's records, Alma will provide a visual indication that a resource is using a linked record to describe it. Clicking on this icon will lead the staff user to view the linked record in the Network or Community

Zone catalog.

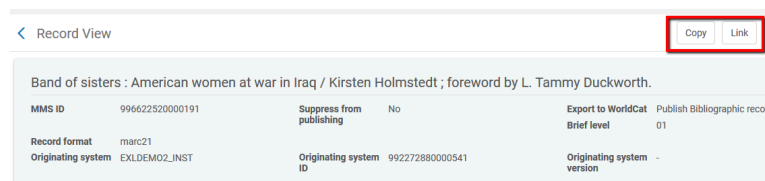
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## How does Alma support collaborative management of cataloging records?

Records managed in a Network Zone are available to all member institutions in the Network Zone.

When working at a member institution in a collaborative network, you can manage bibliographic and authority records at either the institution or network level.

- You can copy records from the network to the institution, either creating new, unlinked local records or new, linked local records linked to the network-managed record
- If you choose the Copy option, the record will be copied to the local institution but will not be updated if the network record is updated.
- If you choose the Link option a linked local record will be created in the institution. If the network record is updated, the linked local record will also be automatically updated.



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## Can cataloging edits be restricted?

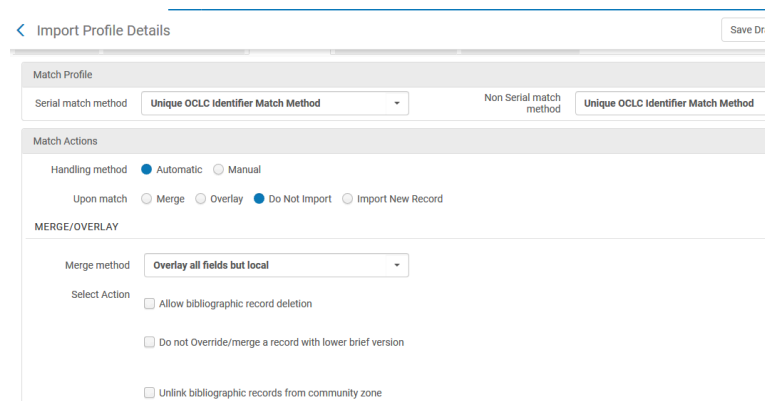
Cataloging edits can be restricted at the record level using the cataloger privileges functionality in Alma. This functionality gives you the option to define a hierarchy for better control of the privilege to edit bibliographic and authority records. This functionality is handled through cataloging level code assignments per cataloger.

The Metadata (MD) Editor in Alma displays the current cataloging level. Any user assigned an equal or higher value cataloging level can edit the record. In addition, the MD Editor provides the option to change the cataloging level for the record. Any cataloging level equal to or below that of the cataloging level assigned to the user can be set as the cataloging level for the record. If the user's cataloging permission level is lower than the cataloging level assigned to the record, the user can only view the record.

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## How does Alma resolve multiple matches of records in the NZ?

The import profile allows for defining how to handle multi-matches:



When multiple matches are found, the user can try to resolve them using several automatic decisions. If the decision is checked, the following actions are made in Alma:

- Get the record inventory type according to the “inventory information” tab, operation parameter:
  - None- nothing to do, continue as usual.
  - Physical/Electronic- this is the inventory type P/E.
  - Mixed- in this case need to derive for each bib record the type of inventory according to the “Resource type” mapping.
- Get the matched record inventory type:
  - Retrieve all the IE objects that are linked to the record. In consortia, retrieve them also from all the members.
  - If there are Electronic Items and Physical Items – we mark them as mixed
  - If there are Electronic Items and no Physical Items – we mark them as Electronic
  - If there are Physical Items and no Electronic Items – we mark them as Physical
- Finding the best match:
  - A single type match (E-E or P-P) – we select it.
  - More than single match- the process will continue as usual without resolving the multiple matches.
  - No matched record with the relevant type and there is a single ‘MIX’- we select it.
  - None of the above - The process will continue as usual without resolving the multiple matches

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## How can a batch of records be deleted by one library without negatively affecting the data of other libraries sharing those same records?


A member institution can build a set of the records and then delete them by running a job such as “delete bibliographic records” or “withdraw items”. This will affect only the member institution running the job. It will not affect other institutions or the network zone.

As an example:

Searching the Network Zone shows that the following titles are held by ‘Alma University’, the ‘University of Knowledge’ and ‘Open University’:

[Institution](#)
[Network](#)
[Community](#)


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1  **A night to remember / Walter Lord.**  
**Book {Book - Physical}** By Lord, Walter, (London : Viking 2012.)  
**Subject:** Titanic(Steamship) Shipwrecks--North Atlantic Ocean. Marine accidents--North Atlantic Ocean. and others

[Electronic](#)
[Digital](#)
[Held by \(3\)](#)

**My Institution, Open University, University of Knowledge**

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2  **PROM NIGHT [electronic resource].**  
**Book {Book - Electronic} text; computer; online resource** By Best, Amy L. (Hoboken : Taylor and Francis 2013.)  
**Subject:** High school students. Proms. Proms - Social aspects - United States. and others

[Electronic](#)
[Digital](#)
[Held by \(1\)](#)

**My Institution**

The Open University chooses to delete these records and other records from their inventory (catalog). They create a set of the records and then run a job such as “withdraw items” or “delete bibliographic records”:

Run a Job - Select Job to Run

1 - 5 of 5

Type: **Withdraw** Source type: **System Defined**

Name	Description	Content Type	Type
<input type="radio"/> 1 Withdraw items	Withdraw physical items task.	Physical item	Withdraw
<input type="radio"/> 2 Withdraw digital representations	Withdraw digital representations task.	Representation	Withdraw
<input type="radio"/> 3 Delete portfolios	Delete portfolios task.	Portfolio	Withdraw
<input type="radio"/> 4 Delete local authority records	Delete local authority records	Authority MMS	Withdraw
<input checked="" type="radio"/> 5 Delete Bibliographic records	Delete Bibliographic records	Bibliographic title	Withdraw

Once the job has run, the records shown above will now only display holdings in Alma University and Open University when searching the Network Zone:

## Can Alma identify 'unused' records in the Network Zone?

Alma supports a process (job) that identifies bibliographic records that are not used in the Network Zone. Bibliographic records are considered not used when no member has any inventory associated with them:

Task Parameters: Identify records that are not used in the Network

Output set name \* **Identify records that are not used in the Network**

"Not used" records apply to:

- Records with no inventory (physical, electronic, digital)
- Records that are not associated with Collections
- Records that are not associated with PO Lines
- Records with no resource requests
- Records with no resource sharing lending requests
- Records with no reading list citations
- Records that are part of a boundwith relation

## Can consortial partners create bibliographic records exclusively at the local level?

In the Alma MD Editor workflow options allow cataloging staff to define the placement of new records – either locally or to be shared by the network. This can be modified at any time:

Options

Placement of new bibliographic records

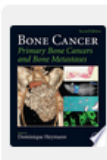
Local  Network


Placement of new rules

Local  Network

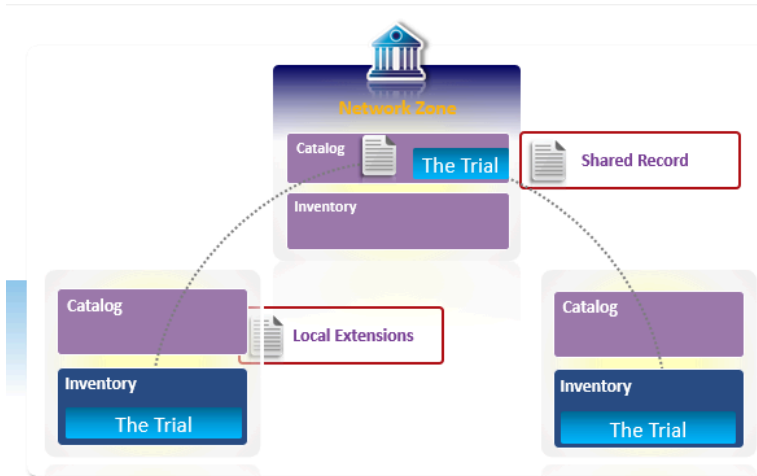
Save Cancel

When searching the local repository, Alma clearly indicates if a record is linked to the Network Zone (consortial catalog) with a display of the network icon:

8  **Bone Cancer**  
**Book {Book - Electronic}** (Elsevier Science 2014)  
**Subject:** Internal Medicine; Medical; Biology

 Physical  **Electronic (1)** Digital

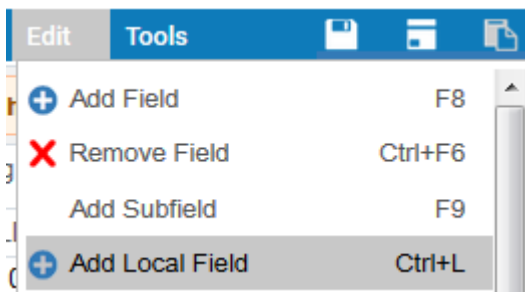
Records without this icon can be viewable only in the local catalog and not in the Network Zone (shared catalog).




## How can libraries within a consortium define local fields that will only be viewable by the member library?

Members of a consortium can add local fields that will only display when in the member's repository.

This is achieved by adding a 'local' rather than a 'regular' field:




The local field will display in the MD Editor with the institution icon:

Working on -Picasso (99136653800191) , Created by Ex L	
035	\$\$a (XX-XxUND)416270715860228785
037	\$\$f DG \$\$n Ebook only
040	\$\$a XX-XxUND \$\$c XX-XxUND
041	\$\$a eng
 099	\$\$a This is a local field
100 1	\$\$a Victoria Charles \$\$e author

In the member's repository staff will see the local field:

## < Record View

<b>LDR</b>	047179am 22002299 4500
<b>001</b>	99136653800191
<b>007</b>	tz
<b>008</b>	s2014 xx        o  und d
<b>020</b>	__  a 9781781608272
<b>035</b>	__  a (XX-XxUND)4162707158602287858
<b>037</b>	__  f DG  n Ebook only
<b>040</b>	__  a XX-XxUND  c XX-XxUND
<b>041</b>	__  a eng
 <b>099</b>	__  a This is a local field

In the NZ or repositories of other members of the consortium, this field will not display:

## < Record View


<b>LDR</b>	047179am 22002299 4500
<b>001</b>	99136653800191
<b>007</b>	tz
<b>008</b>	s2014 xx        o  und d
<b>020</b>	__  a 9781781608272
<b>035</b>	__  a (XX-XxUND)4162707158602287858
<b>037</b>	__  f DG  n Ebook only
<b>040</b>	__  a XX-XxUND  c XX-XxUND
<b>041</b>	__  a eng
<b>100</b>	1_  a Victoria Charles  e author

## Searching

### How do network search results display?

Staff may search the Alma Network Zone for records. Results of the search will include a Held By link.

The Held By Details page provides additional information for each institution in the **Held By** list displayed in your search results. This indicator appears in the **Network** tab if inventory exists for the resource at one of the network member institutions, including your own:

1  **A night to remember / Walter Lord.**  
Book (Book - Physical) By Lord, Walter, (London : Viking &  
**Subject:** Titanic(Steamship) Shipwrecks--North Atlantic C  
Marine accidents--North Atlantic Ocean. and others

Electronic   Digital   **Held by (3)**

[My Institution, Open University, University of Knowledge](#)

Clicking on the link of one of the institutions displayed in the **Held by** list will display the Held By Details. The left pane on the Held By Details page lists all the institutions in hyperlink format so that you can easily switch from institution to institution while the page refreshes to display the selected institution's holdings.

< 'Held By' Details

A night to remember / Walter Lord.

Institution Open University

Held by Institutions ▾

- My Institution (Alma University)
- Open University
- University of Knowledge

Holdings (2) Portfolios (0) Representations (0) Electronic Collections (0) Orders (1)

1 Library: Central Library  
 Location: General  
 Call Number: G  
 No. of Items: 1  
 Available: 1

In addition, this page provides the following tabs that contain detailed resource (inventory) information:

- Holdings
- Portfolios
- Representations
- Electronic Collections
- Orders

The **Holdings** tab displays the following information about each holdings record for the institution that you clicked in the **Held by** search results:

- Library that holds the resource
- Location
- Call number
- Coverage information (Journals)
- Number of items
- Number of available items - Click the number link to view the List of Items page with the complete list of items specific to that holdings record. All related items are listed including unavailable items and unpublished items.

The **Portfolios** tab displays the following information about each portfolio record for the institution that you clicked in the **Held by** search results:

Interface name

- Service type
- Material type
- Coverage - The from/until date range of coverage information for the portfolio.
- Status (activated/deactivated)
- Public note

The **Representations** tab displays the following information about each representation record for the institution that you clicked in the **Held by** search results:

- Representation label
- Number of files
- Usage type (master/derivative)
- Representation's public note

The **Electronic Collections** tab displays the following information about each electronic collection record for the institution that you clicked in the **Held by** search results:

- Name of the electronic collection
- Collection type (selective package, aggregator package, or database)
- Service type (full text or selected full text)
- Coverage (the coverage period of the electronic collection)
- Status (activated or deactivated)

The **Orders** tab displays the following information about each orders record for the institution that you clicked in the **Held by** search results:

- PO line status
- PO line reference
- MMS ID
- Vendor name
- Vendor account
- Type

Total views:

691