
How to use a MARC Enrichment Service with Alma

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1. **Pulling records from Alma to send for enrichment.**

- A. Create and run an Alma Analytics report (see screen shot at end) to identify all bib records created since the last enrichment. Limit your query to the following parameters:

Bib not suppressed

Bib lifecycle is In Repository

Locations: You may or may not want to limit the results to certain locations. I have limited to include most of our print book locations, no online or media or gov doc titles. (The TOCs are already easily accessible for our ebooks.)

Prompt for creation date between date 1 and date 2. This way you don't have to edit the query every year, you just fill in the desired dates every time you want to run it.

Besides limiting to and reporting out those values, the query also reports out the MMS ID, title, and publication date. The MMS ID is necessary to accomplish the export, I'm just used to seeing the other values.

- B. In Analytics, go to Catalog, find the report name, click Open, fill in the date range, click OK, and it gives the results. Look them over briefly to see if anything is amiss.
- C. Export the results to Excel.
- D. Edit the Excel spreadsheet to include only the column containing the MMS ID, with a column header MMS I
- E. In Alma, go to Admin/Manage Jobs and Sets/Manage Sets. Choose Add Set/Itemized. Give the set a name, maybe a description, Set Content Type Physical Titles (if you limited the Analytics query to only physical locations—otherwise set the Content Type appropriately). At the bottom is a section called Add Contents From File to Set.

Select From File and browse to the name of the Excel spreadsheet created in Step D. Then at the top, click Add Members to Set. Alma creates the set.

- F. Instead of Step E, you now might be able to just input the name of the Analytics report and hopefully Alma would do the work needed. It might not work due to the prompt, you might actually have to put the date range in the query as a filter on the creation date.
- G. Run the Alma Job Export Bibliographic Records on the set created in Step E.

Physical format: Binary

Output format: MARC21 Bibliographic

Number of records in file: One File

Export into folder: Private

You're not FTPing anything so leave those boxes blank. Click Next, then Submit (top right)

This gives you a MARC file to send to YBP (or another enrichment vendor).

2. **Reloading those records upon return (load profile).**

- A. In Alma/Resources/Cataloging/Open Metadata Editor, select Rules/Merge Rules. I created this merge rule (see screen shot at end) ("exists" is not a typo—see screen shot of merge rule):

rule "Merge incoming 505 520 into existing Alma record"

when

merge

then

add MARC."505" if does not exists

add MARC."520" if does not exists

end

- B. We are profiled to have YBP add a 505 or 520 ONLY to those records that don't already have a 505 or 520, and to return to us ONLY those records to which they added a 505 or 520. This is usually about 1/3 of all the records we send.
- C. Reload the records using this Import Profile and Merge setting:

Profile name (you can name it anything you want): Merge YBP TOC and 520

Originating system: WorldCat (because we get all of our book records from OCLC originally)

Import Protocol: Upload File/s

Physical Source Format: Binary

Encoding format: ISO8859_1 (Although records in Alma are UTF 8, YBP returns them as Marc 8 (non-Unicode). If your vendor returns them as UTF 8, use that as the encoding format.)

Source format: Marc21 Bibliographic

Status: Active

Match Profile:

1. Match by Serial/nonSerial: Yes
2. Serial match method: Unique OCLC Identifier Match Method (you could also use 001 to MMS_ID, it is

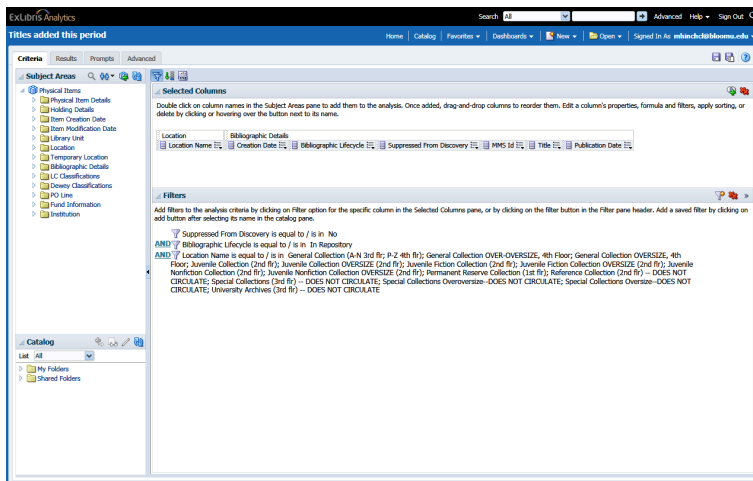
actually probably better)

3. Non Serial match method: Unique OCLC Identifier Match Method (you could also use 001 to MMS_ID, it is actually probably better)
4. Match Actions
 - a. Handling Method: Automatic
 - b. Upon match: Merge
5. Merge/Overlay
 - a. Merge method: Merge incoming 505 520 into existing Alma record
 - b. I leave everything else blank, although I did select Ignore originating system.
6. Automatic Multi-Match Handling: Skip and do not import unresolved records
7. Handle Record Redirection—your choice. I have Keep It for Canceled Record and the same Merge Method as in Step 5.a.
8. No Match—Upon no match, do not import

I do not set anything in the other 2 tabs, Set Management Tags and Inventory Information in the import profile.

Run the import on the file returned by the vendor.

The Analytics Query



Ex Libris Analytics

Search Advanced Help Sign Out

Titles added this period

Home Catalog Favorites Dashboards New Open Signed In As [mlhards@illinois.edu](#)

Criteria Results Prompts Advanced

Definition

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Creation Date	Column value	Creation Date			<input type="checkbox"/>

Display

Page 1

Creation Date between: -

St. Joseph University Alma

Acquisitions Resources Fulfillment Admin Analytics Cataloging

Physical titles Subjects

Advanced

MD Editor

Templates

Records

Rules

- Normalization rules
- Merge rules
 - Shared
 - Lib Overlay copy
 - Merge incoming 505 520 into existing Alma record
 - droots/ConditionalSubjectHeadings.dslr
 - droots/MergeNoChangeToOfValue.dslr
 - droots/OverlayAllFieldsButLocal.dslr
 - droots/Replace24Sand35OOCLCIEst.dslr
- Community
- Indication rules
- Brief level rules
- Authority headings rules
- XSL Indication Rules
- XSL Transformers

File Edit Tools

Merge incoming 505 520 into existing Alma record

```
rule "Merge incoming 505 520 into existing Alma record"
when
  merge
then
  add MARC "505" if does not exists
  add MARC "520" if does not exists
end
```

Save

Info Alerts Linked Data

Report