

Alma Essentials – Resource Management

Metadata Editor Overview

The Alma Metadata Editor is a working space for managing Records, Templates, and Rules. It is the principle cataloging tool in Alma. In this session, we'll learn how to access the Metadata Editor and get acquainted with its various components.

No matter where you are in Alma, you can immediately show the Metadata Editor via the icon in the Alma menu.

We are currently in the Metadata Editor with a record opened for editing in the Main Panel. We can see the various fields and subfields. You can hide the Metadata Editor via the Metadata Editor icon. This takes you back to the last screen in Alma. The Metadata Editor is always on; so you can work in other areas of Alma, and when you return to the Editor, any records you had open will be waiting for you to resume work.

Another way to access the metadata editor is by searching for a record, and clicking Edit Record. This opens the Metadata Editor with the selected record open for editing in the Main Panel.

The Editor comprises of three modules: Records, Templates, and Rules. You can switch between the modules in this menu.

Records refers to bibliographic records, authority records, and the like.

Record Templates can be used to create new records with predefined fields, to expedite cataloging. For example, you could have a template for print books, or for music albums. We will learn about Templates in a dedicated session.

Normalization Rules allow you to enhance records according to select criteria, for example to edit or delete fields. Normalization Rules are composed in the Metadata Editor in a specific programming syntax. You can learn more about Normalization Rules in a dedicated session.

Each of these three modules has its corresponding menus with editing options in the top menu .

When working on records, you can toggle between the different record types, such as Dublin Core, Holdings, and MARC 21.

The Navigation Panel displays the records you are currently working on from the record type we've just selected, and allows you to navigate between the records. You can minimize or maximize the Navigation Panel; and pin the Navigation Panel to keep it open as you edit the records. The records can be filtered to show only records of your Institution, Network, or the Alma Community. They can also be sorted by Entry Time or alphabetically.

If you need to work on additional records, you can push them into the Metadata Editor, so they will appear in the Navigation Panel as well. Search for those records in Alma. For the desired records, click Push to Metadata Editor. You can also select several records and click Push Selected to Metadata Editor. Now when you open the Metadata Editor, you can see the pushed records in the Navigation Panel.

An alternative method for loading several records into the Metadata Editor, is to catalog a set of records. Go to Admin > Manage Sets. Find your desired set of titles, and click Options > Catalog set. This opens the Metadata Editor with the set of records in the Navigation Panel. You can minimize and maximize the display of the set. And work on the individual records.

To open a record for editing, click on it. The record displays in the Main Panel, and you can now edit it. You can open two records at a time using Split Mode. In the Navigation Panel click the Split Mode icon. An additional pane opens on the right.

You can toggle between the two panes to select which one is active. With the right pane selected, we can click on a record in the Navigation Panel to open it on the right pane.

Split-mode lets you keep your original record open when copy cataloging, displaying authority records, testing a Normalization Rule, or searching.

You can search from the Search and Browse menu. Search Resources allows you to search a selection of repositories that are configured for your institution. You can perform advanced searches according to selected criteria.

To return to full screen editing, simply close the right pane.

This was a brief orientation of the various components of the Metadata Editor. In our next sessions we'll discuss how work with Records and Templates.

Thanks for joining!