Alma Essentials – Resource Management

Editing Records in the Metadata Editor

In our last session, we saw how to push records into the Metadata Editor from Alma search results, and how to open a record for editing. In this session, we'll learn how to edit records in the Metadata Editor.

Once you've opened a record for editing, it is locked for use by other users until you release the record when you're done. We'll show this later.

In the top ribbon we can see the record title. The zone icon shows us this record belongs to our institution, as opposed to our Network or the Alma Community. Your institution can define Cataloging Levels, depending on the skill of the cataloger. The information icon shows us when the record was created and modified .

To edit a field, click on it. You can edit the field number, the indicators, and the field value, including the various subfields. You can move between fields with the up and down arrows. Using the ellipsis icon, you can show the field information, in this case from Library of Congress, to help you fill in the data in the correct format. You can add a new field by pressing F8, and a new subfield by pressing F9.

In the Editing Actions menu you can find all the editing actions along with their keyboard shortcuts.

For fixed-length fields, such as LDR or 008, you can select Open Form Editor, to edit the field in a user-friendly interface that explains the available values for each index .

To remove a field, select it, and click Editing Actions > Remove Field.

The Enhance the Record option lets you run a Normalization Rule to update the record, as defined by the rule. You can create your own Normalization Rules. This rule, for example, adds a 520 field for Project Gutenberg Free ebooks. If we run the rule, we can see the field has been added.

Back in the Editing Actions menu, Expand from Template adds fields to the record as defined in a selected Record Template. We will discuss Templates in a dedicated session.

If your institution is part of an Alma Network, Add Local Extension lets you add your own local note fields to bibliographic records managed by your Network Zone. The Local Extensions will appear only in searches within your institution.

The Insert Directional Characters option is used for changing the text direction when cataloging in multi-languages with different text directions; for example, to embed Hebrew text in an English text.

You can use Authority records to populate select fields. For some fields, such as the 650 field, the Authorities thesaurus used is determined by the second indicator. To fill in a field using Authorities, enter at least three characters in the field, and press F3. The suggested Authority records open from the relevant vocabulary; in this example, LCNAMES. You can also use other Authorities or create your own local authority records. You can View an authority record, and if you like what you see, Select it to populate the field. The binoculars

icon lets you know this field is now linked to an Authority record. Clicking on the binoculars displays the Authority record. After making changes to the record, don't forget to save it by clicking Save.

You can also save the record as a Draft, if you don't want the changes to appear yet in discovery. The top ribbon indicates this record is a Draft, until you save it again. Upon saving, Alma does some normalization on the record, such as adding the MMS ID (which is the record's ID in Alma) to the 001 field. Your institution can add its own custom normalization processing upon save.

Alma also validates the record upon save, and will display any warnings and errors in the bottom panel. Expand the panel to see the warnings, and click on each individual warning to jump to that field and correct the warning.

Note that your record is still locked for editing by other users until you release it. Although, it will eventually be released based on configuration, even if you forget to release it. You can release a record by clicking Save and Release Record. Or under Record Actions > Release Record. This closes the record, removes it from the Navigation bar, and unlocks it for editing by other users. You can also release all currently displayed records in the Navigation bar via the Release Records icon.

You can create a new record from the New Menu. Select the template and start editing the record, as we've seen before.

In our next session, we'll take a look at additional actions you can perform on records in the Metadata Editor.