Alma Administration – Resources
Metadata Configuration and Validation

Hello, Metadata profiles such as MARC21 bibliographic or Dublin Core are schemas with defined sets of attributes which are used to describe physical, electronic, and digital materials. When you open a MARC21 bibliographic record for example, the fields and subfield that you see are defined in the Metadata profiles.

In this session you will learn how to define the Metadata profiles- we will edit the MARC21 profile and learn how to validate the information entered using validation rules and exception profiles.

To configure metadata profiles, go to Configuration 🡪 Resources 🡪 Cataloging 🡪 Metadata Configuration. The Active Profiles that display here are the ones your library can configure and are determined by Exlibris.

Let's configure the MARC21 bibliographic record by clicking on its profile name.

This opens the Profile Details page, which has several tabs. Note, that the tabs and parameters may change between the different profiles.

The Fields tab shows a list of the metadata fields for this profile. When the filter is set to All, a complete list of metadata fields appears. Use the filter options to navigate to a specific area in the schema or use the Field search box to search for a specific field by number or description. Let's Narrow the schema to a specific field – 310.

Click on the row actions list to see the menu options. You can either view, edit, or restore the field to the default settings – which indicates that this field has already been customized.

Let's edit it. The field details page opens, displaying general information about the field

For example, this field is not repeatable. You can set whether this field is mandatory or not, change the description, and add a help URL. The contents of this link appears in the Field Information area in the metadata editor. If this field is left blank, the default is to the Library of Congress cataloging standard information.

Let's see how to configure the subfields and the first and second Indicators.

Start with the subfields. This is a list of all the subfields under the 310 field. You can edit the description, set a field as mandatory, and determine whether it is repeatable. From the row action list, you can also assign a controlled vocabulary.

A controlled vocabulary is a list of acceptable values for that subfield. Let's add a controlled vocabulary for subfield a. You can either choose an existing controlled vocabulary from the dropdown list, or you can create a new, locally defined, controlled vocabulary that will only apply to this field by entering a code and description and clicking the Add button.

Read more about how to configure controlled vocabularies in the configuring Controlled Vocabulary Registry page in the online help.

If you select an existing controlled vocabulary the details will display on screen. Clicking Assign will save your changes.

Back on the Field Details page, expand the First and Second indicator and make any required changes. And Save.

Next, under the Forms tab, you can create a form that consists of a template of fields to be used when creating digital representations. You can read more about it in the Configuring Cataloging page in the Online Help.

Under the Normalization Processes tab, a list of normalization processes appears. These processes will correct or update the records, and they apply to the entire MARC21 Bibliographic profile. clicking on the +Add Process link, you can create a brand-new normalization process to be associated with this metadata profile.

From the row action list, you can Copy, Edit or Delete any existing process.

Let's edit it.

The Task List tab displays the list of tasks this process will perform. By clicking Add Tasks you can add a task from a predefined list of tasks. You can also remove an existing one.

Get detailed information about this list in the configuring metadata page in the Online Help

If you wish to use an existing Normalization Rule from the metadata editor, like in this example, choose MarcDroolNormalization task, and in the Task Parameters select the normalization rule you would like to run. And Save.

Next, in the Validation Processes tab, you can see the out of the box validation processes.

Each of them handles different records.

You can edit them, but you cannot create new ones. When editing them, the Process Details page opens to the General Information tab.

Again, from the Task List tab, you can view the tasks this process will perform. For example, the Validation Repeatable MARC21 task will validate repeatable and non-repeatable fields, according to what you've configured in the Fields tab. You can either add or remove tasks. Read more about what each task validates in the Configuring Cataloging page in the Online Help.

Next, in the Validation Exception Profile List tab, you can determine the severity of the validation issues you defined in the validation processes. So when Alma encounters an issue as a result of one of those processes, you can define It's behavior.

Errors- will block users from continuing, or Warnings – which will only warn the users but allows them to continue.

Under the Validation Exception Profile List tab, you can see the Name, Description and Default Severity of each profile. 2 of them, are out of the box profiles. In the MARC XML Bib Metadata Editing on Save profile for example, the default severity is WARNING. Let's edit it, to see if there are any exceptions. Under General Information you can view and change the default behavior for all issues. In the table below are the exceptions. Meaning, the issues that will get errors and won't allow the user to continue until fixing it in the record. So for example, if a record has a mandatory field 245 missing – Alma will present an error and the user will be blocked until entering a value in that field. To add another exception click Add Validation Severity Exception Select the Message you want to be displayed and the required parameters accordingly. For example, mandatory subfield is missing in field. Fill in the SUBFIELD, and the Field. And Add Validation Severity Exception. Here it is.

Lastly, on the Other Settings tab you can select a Brief Level Rule for this profile and select parameters to handle certain fields in a particular manner when saving records.

Now you know how to configure Alma's Metadata and validate it.

Thanks for watching!