Alma Administration – Resources

**Call Number Mapping**

When a new holdings record is created, Alma uses the call number mapping table to automatically copy the call number from the bibliographic record into the holdings record. The call number mapping table comes with pre-defined rules that work for the typical needs of many institutions. However, you can also customize the table as needed.

In this session, we will learn how to customize the call number mapping table. As an example of how this table is used in practice, we will also demonstrate how to create a holdings template that will be automatically populated with the correct call number.

Find the call number mapping table in Alma Configuration > Resources > General: Call number mapping. Each row represents a rule for copying a call number from the bib record into the 852 field of the holdings record. Alma checks the rules in order. If the rule can be applied, Alma executes that mapping rule and then stops. If it does not apply, Alma continues to check the next rule, and so on.

The number displayed in the 852 1st Indicator column represents the shelving scheme associated with the holding: Zero indicates Library of Congress classification, one indicates Dewey Decimal classification, two represents National Library of Medicine classification, and so forth. The shelving scheme displays in the Description column.

Let’s look at the first row as an example:

If the 852 first indicator is a zero, Alma will continue to check this rule. If not, Alma will look for the first rule in the list with that indicator. Next, it checks if the 852 Subfield 2 is empty. If so, it goes on to check if there is something in the 090 field of the bib record. The question marks indicate that any value can be in the 1st and 2nd indicator.

Alternatively, one or both indicators can be specified, as in this example: 050?4 means that in the 050 field, the first indicator can have any value, but the second indicator must be four in order to apply this rule.

Going back to our example row, if 090 exists with any indicators, the rule will then check for the presence of subfields a and b. If subfields a and b exist, the rule will copy 090 subfield a into 852 subfield h and 090 subfield b into 852 subfield i.

This rule will only be executed if all the criteria are met exactly as written in the rule. If, for example, the bib record’s 090 only has subfield a and no subfield b, then this rule will be skipped.

If, in that situation, you want Alma to copy the subfield a by itself, you need to add a rule. Here’s how to do that. Scroll down. Fill in the information. For Bib Subfields to Copy, we will put just a. For 852 Subfield Destinations, we will put just h. Click Add.

You can change the order by moving a rule up or down with these arrows. In our case, we want our new rule to come after the rule that would copy both subfields a and b.

It is possible to delete a rule, but better to just disable it with the toggle switch, if needed.

Remember to save your changes.

Now that we have seen how to customize the call number mapping table, let’s look at an example of these rules in action.

Let’s say that our institution generally uses the Library of Congress shelving scheme, but for our Education library, we use Dewey Decimal. We will create a holdings template that we can use for books in the Education library that will automatically map the Dewey Decimal call number from the bib record. This template will rely on this rule.

When the 852 first indicator is a 1, which represents Dewey, and the 852 Subfield 2 is blank, Alma will copy 082 subfields a and b, if they exist, and put them into 852 subfields h and i of the holdings record.

Here is how we create the template:

Exit Alma Configuration. Open the Metadata Editor. Select Templates and Holdings. The easiest way to create a template is to duplicate an existing one and then modify it. Let’s duplicate this Books template. Right click on Books, and select Duplicate. Change the Name, and, if you want to, the Description. Decide if this template will be Private, just for you, or Shared, available for all users in your institution. You can set this as your Default holdings template by checking the box.

Now, we will edit the holdings template. Select it from the list of holdings templates on the left. For the 852 field, Open the form editor. We want this template to be for books in the Education library, so we will select that. And, we want these books to have Dewey call numbers, so we will put 1 as the first indicator. Of course, you can add more details if you want, depending on how specific you want to make this template. Then click Save.

To see how this holdings template works, let’s open a bib record.

Now go back to Templates > Holdings, and click the template name to open it.

This holdings record now has the title from the bib, and the location from the template. To copy the call number, we select Record Actions, Update from Bibliographic. As you can see, the call number has been added. It was taken from the 082 field. Subfields a and b were copied into subfields h and i.

In this case, we used the Update from Bibliographic tool in the Metadata editor. The call number mapping table is also used:

* When saving a new holdings record in the Metadata Editor
* When running an Import Job
* When running the Change Holding Information job

Now you know how to customize the call number mapping table, so that you will get the results you want in all of these instances.

Thanks for joining us!