**Resource Management - Metadata Editor**

**Training Material**

**[Metadata Editor](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/M_Metadata_Editor)**

[**Terminology and Inventory Models** - **Alma Collaborative Networks**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/A_Terminology_and_Inventory_Models)

 **Hands-on Exercises**

**Instructions**

For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.  To get started, sign into your sandbox Member 1 environment as **AlmaUser01.**

**Exercise 1: Create a new brief bib record in the Institution Zone (IZ) and add a holding and item to the bib. Then contribute the bib record to the Network Zone (NZ).**

1. Create a new brief bib record in the IZ (local bib)
* Go to **Resources > Catalog > Open Metadata Editor > Records** tab
* Click **New > Placement Options**
* Select **Local** for **Placement of new records and templates**, then click **Save**. This is where you control whether new record will be placed in the IZ (Local) or NZ (Network)



* Click **New > MARC21 Bibliographic > Books (Default)** and add some basic information in 245, 100, etc.
* When done, click the **Save** icon, click **Save Record** under the **Save** menu, or enter **Ctrl+S**
1. Add a holding and an item
* Holdings can be added three ways
	+ Click **New > MARC21 Holdings >Books Default Template**
	+ Click **Add Inventory > Add MARC21 Holdings > Books Default Template**
	+ Enter **Ctrl+Alt+H**
* Place the cursor in the 852 and enter **Ctrl+F** to open the form editor
* Edit the library and location information and enter Ctrl+S to save your changes and close the form editor
* Click **Add Inventory > Add item** or enter **Ctrl+I**
* Enter **Barcode**, any other relevant information as needed, and click **Save**
1. Contribute the bib record to the NZ
* Use the persistent search bar to perform an **All titles** search in the IZ for the record you just added
* Your new record will not have the NZ icon. Physical inventory (holding and item records) are attached to the bibliographic record
* Click **Edit Record** in the row action menu
* Note the IZ icon is to the left of the title
* In the MD Editor, click **Record Actions > Share with Network**
* Search for record again in the persistent search bar, the NZ icon would now appear for the record.

**Exercise 2: Create a new brief bib record directly in the NZ.**

1. Create a brief bib record directly in the NZ
* Go to **Resources > Catalog > Open Metadata Editor > Records** tab
* Click **New > Placement Options**
* Select **Network** for **Placement of new records and templates**, then click **Save**
* Click **New > MARC21 Bibliographic > Books (Default)** and add some basic information in 245, 100, etc.
* When done, click the **Save** icon, click **Save Record** under the **Save** menu, or enter **Ctrl+S**
* Perform **All titles** search for the bib record you just added.

You will not see your record if your search is scoped to your IZ.

* Switch to the NZ and perform the search again

**Exercise 3: Create a linked copy of an NZ record in your IZ, then add holding and item records in the IZ**

1. Use the persistent search bar to locate a bibliographic record for a physical resource in the NZ that does not have an IZ icon (indicating a linked record in your IZ). You can use the bib record you created above or search for a new one.
2. Choose one of these options to create a linked copy of the NZ record in the IZ:
	* **Option A:** Inventory method
		+ Click **Edit Record** in the row action menu to open he MD record in the MD editor
		+ In the MD Editor, add holding and item records (Step 2 in Exercise 1)

Inventory records (holdings and items) are in the IZ they are linked to the bib record in the NZ.

* + **Option B:** Link Method
		- Click on the title of the record for a read-only view of the record in the NZ, and click the **Link** button

The NZ record is linked to the local institution even though there is no inventory associated with the bibliographic record.

**What’s the difference between Copying and Linking?**

|  |  |
| --- | --- |
| Link to the NZ | Copy from the NZ |
| Creates a linked copy of the NZ record in the IZ.  | Creates an unlinked, local copy of the NZ record in the IZ. |
| Changes to the local copy *are* reflected in the NZ record (except $9LOCAL fields).  | Changes to the local copy are not reflected in the NZ record. |
| Changes to the NZ record, or to the linked record in any other member’s IZ (except $9LOCAL fields), are reflected in the NZ copy and thus in your IZ copy. | Changes to the NZ record, or to the linked record in any other member’s IZ are not reflected you your IZ copy. |
| This option should be used in most cases to take advantage of collaborative cataloging. | This option should not be used often because it will create a duplicate copy. |

1. Search for the record using an **All Titles** search in in your IZ and then again in the NZ
	* You should see by the icons that the NZ and IZ records are linked
	* If you used **Option A** above, you will see inventory at your institution
	* If you used **Option B** above, you can edit the record to add inventory now

**Exercise 4: Manually delete a bib record that is linked to the NZ**

1. Unlink your record from the NZ before you can delete it
	* Search All titles with a keyword of your choice using the IZ dropdown option in the persistent search box
	* Find a bib record that is linked to an NZ master record and click **Edit Record** in the row action menu
	* In the MD Editor, go to **Record Actions > Copy to Catalog** then **Save** the record
	* The IZ icon is showing next to the record which confirms that you that your copy of the record is unlinked from the NZ master record
2. Delete your local copy of the record
	* Click **Record Actions > Delete Record** menu and click Delete Record
	* Review the confirmation message on screen and click **Yes** to continue

**Exercise 4: Run a batch job to delete a set of bib records**

1. Create a set of All titles or Physical titles records that you want to delete
2. Unlink your set of records from the NZ
	* If the bib records in your set are linked to NZ master records, run the **Unlink a set of records from the Network** job on your set of records.
3. Delete the bib records
* Go to **Admin > Manage Jobs and Sets > Run a Job** and select the **Delete Bibliographic records** job
* Select the set of records to delete and click **Next**
* Decide how to handle associated inventory and click **Next**
* **Submit** the job