

# Alma Cataloging Basics

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## Table of Contents

Searching.....	1
Bringing in a Record from OCLC.....	2
Search External Resources .....	2
Direct Export from OCLC Connexion .....	4
Using a Repository Import Profile.....	7
Exporting from Connexion .....	7
Importing the records in Alma .....	8
Holdings and Items .....	10
Holdings .....	10
Items .....	11
Finishing Touches.....	12

## Searching

Searching should be performed in the Network Zone (NZ) to determine whether anyone else in the consortium already owns the item and prevent duplication.

The default search is All titles > Keywords, which is sufficient for many purposes. For more advanced search techniques, see the Ex Libris documentation: [Searching in Alma](#).

1. Search in Alma for the item to be cataloged. You can either set the search bar to search in the NZ by clicking on the icon to the left of the magnifying glass in the search bar and choosing Network before running your search – OR --
2. If didn't switch to the NZ in step one, just click on the Network tab. Alma will automatically re-run your search in the NZ.
3. If you find a matching record, click on **Edit Record** to the right of the record you've chosen.

1

All titles ▾ Keywords ▾ Lost child Dresel X [icon] Q Advanced ▾

All Titles (1 - 1 of 1) | Lost child Dresel

2

Institution Network Community

Sort by : Rank ▾ Secondary Sort by : Rank ▾

3

1 Collected vocal music / Otto Dresel ; edited by David Francis Urrows. Edit Record Order ...

Music (Notated music - Physical) notated music; unmediated; volume By Dresel, Otto, (Middleton, Wis. : A-R Editions ©2002.) ISBN: 0895795094 and others Language: German  
 Subject: Chansons (Voix aigue) acc. de piano. Chansons (Voix moyenne) acc. de piano. Duos vocales con piano. and others Record number: (OCoLC)ocm51013682 Update Date: -  
 Series: Recent researches in American music ; v. 45.

Electronic Digital Held by (1) Other details

Note: If you click on the title of a record in the results screen, you can view the MARC record in record view. From there, you can either click “[Edit](#)” to open the record in the Metadata Editor or “[Back](#)” if the record is not what you wanted and you want to return to the results screen.

Once you have selected a record to Edit, it will open in the Metadata Editor and you can continue to the section on [Adding Holdings and Items](#).

## Bringing in a Record from OCLC

If you do not find a matching record in Alma, you will need to bring in a record from OCLC. There are three basic ways to accomplish this task:

- Search External Resources
- Direct Export from OCLC Connexion
- Using a Repository Import Profile

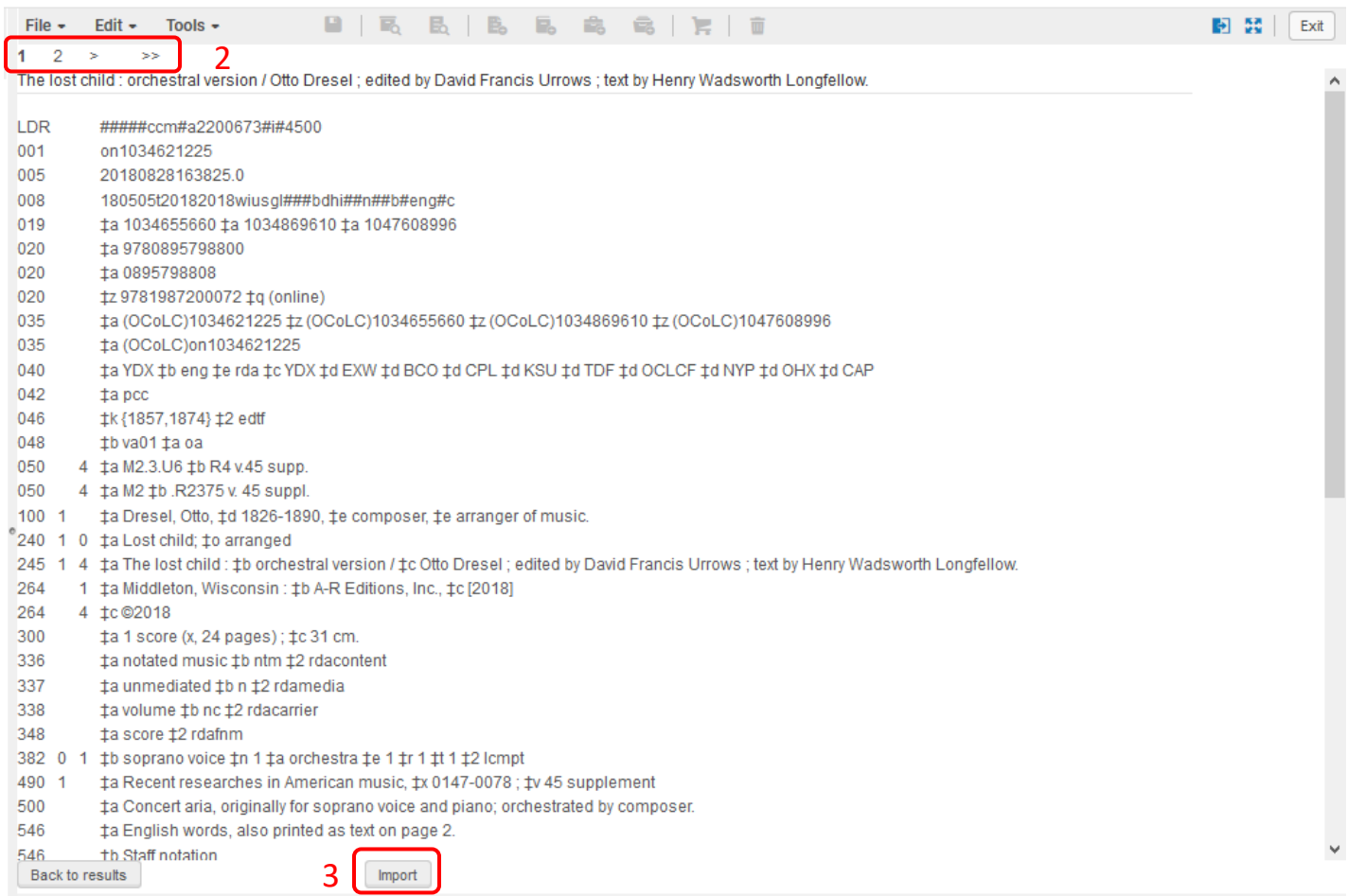
Which method you choose depends on what you wish to accomplish and your preferred method of cataloging.

### Search External Resources

If you prefer to continue working in Alma, this is the method to choose. You can get to this option either from the Alma menu by clicking on [Resources -> Cataloging -> Search External Resources](#) or from within the Metadata Editor by clicking [Tools -> Search External Resources](#).

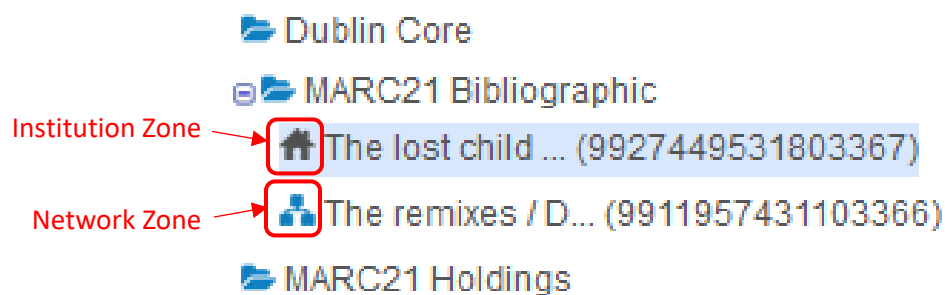
The following screen will open:





Make any necessary edits to the record and proceed to the section on Holdings & Items.

Depending on your settings, your record may save to the Institution Zone instead of the Network Zone



To share with the Network, select the record you wish to share and click [File -> Share with network](#).

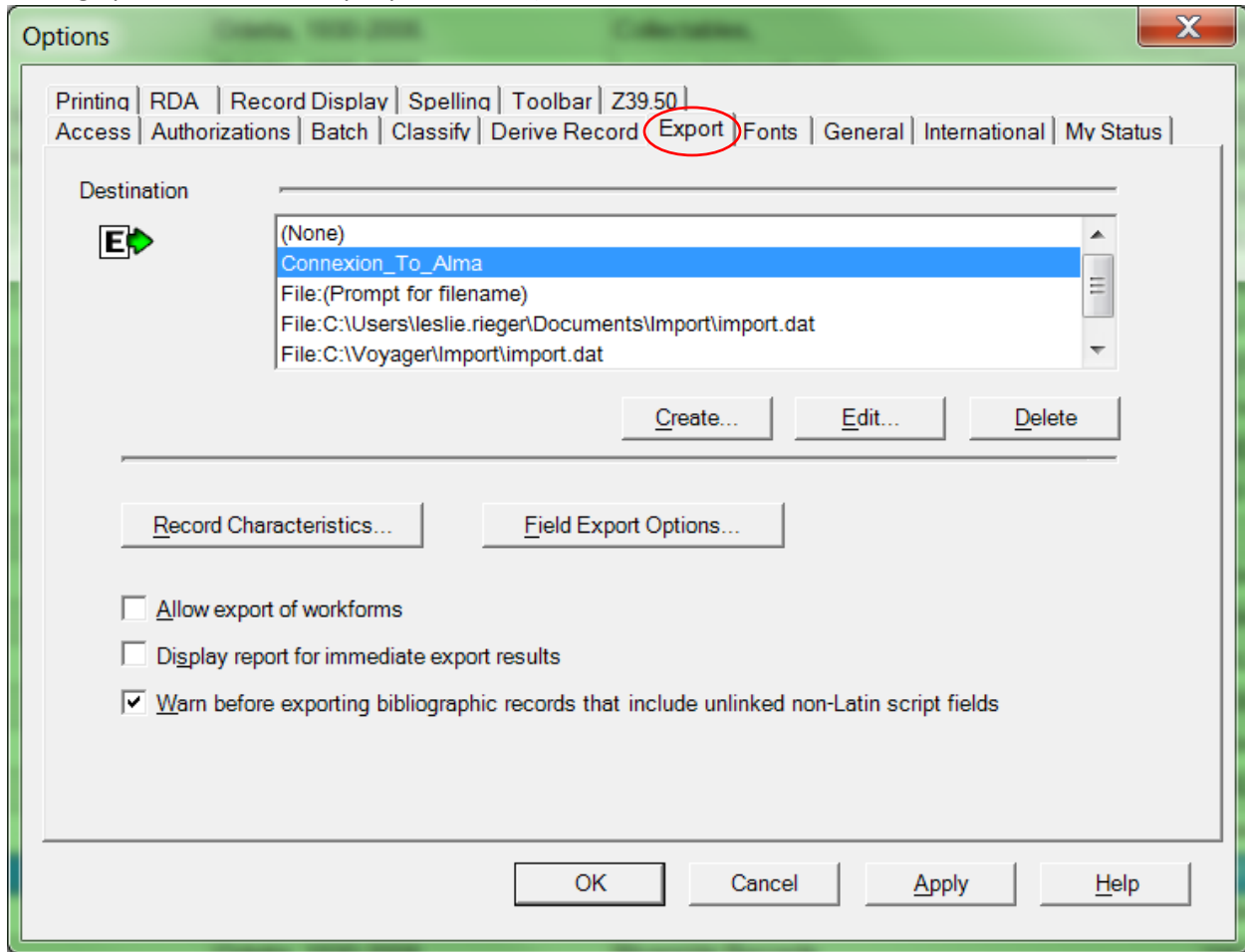
Continue to the section on [Adding Holdings & Items](#).

### Direct Export from OCLC Connexion

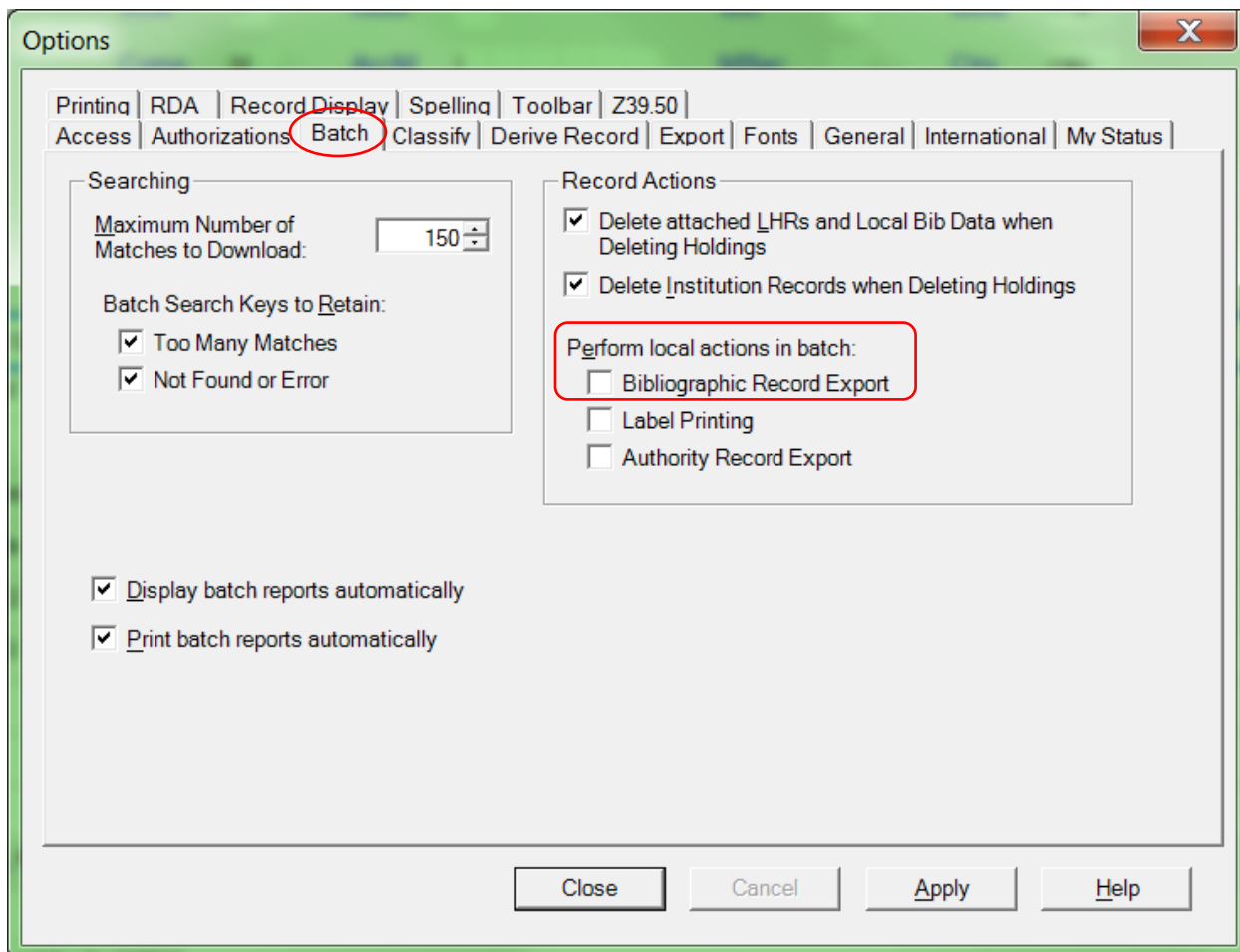
This method is best if you are working in Connexion and have a single record to bring across. **Caution:** This method DOES NOT provide a warning if it is overlaying a record in Alma, so make sure you check the NZ for records before exporting.


To use this method:

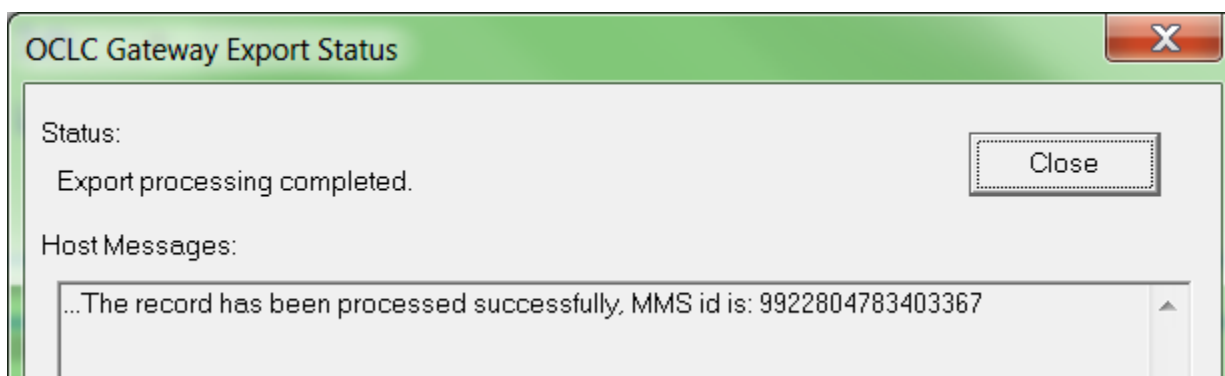
1. Check Tools -> Options -> Export Tab in Connexion to make sure the OCLC Gateway Export is selected ("Connexion\_To\_Alma" in the screenshot – if haven't done this before, you will need to set one up. See the Setting up the OCLC Gateway Export tutorial)



2. Check Tools -> Options -> Batch Tab in Connexion to make sure the Perform local actions in batch: Bibliographic Record Export option is UNCHECKED.



3. Search the NZ in Alma. If the record is already in Alma, make sure that any fields that need to be kept are copied to the OCLC record before exporting (local fields will not be overlaid).
4. In OCLC, select the record you wish to export, and click on the **ActionExport** button (  ) or select **Export** from the **Action** menu.
5. If the export is successful, you will get a message telling you the export processing is complete.



**TIP:** Copy the MMS id # and paste it into the search box in Alma to easily pull up your record.

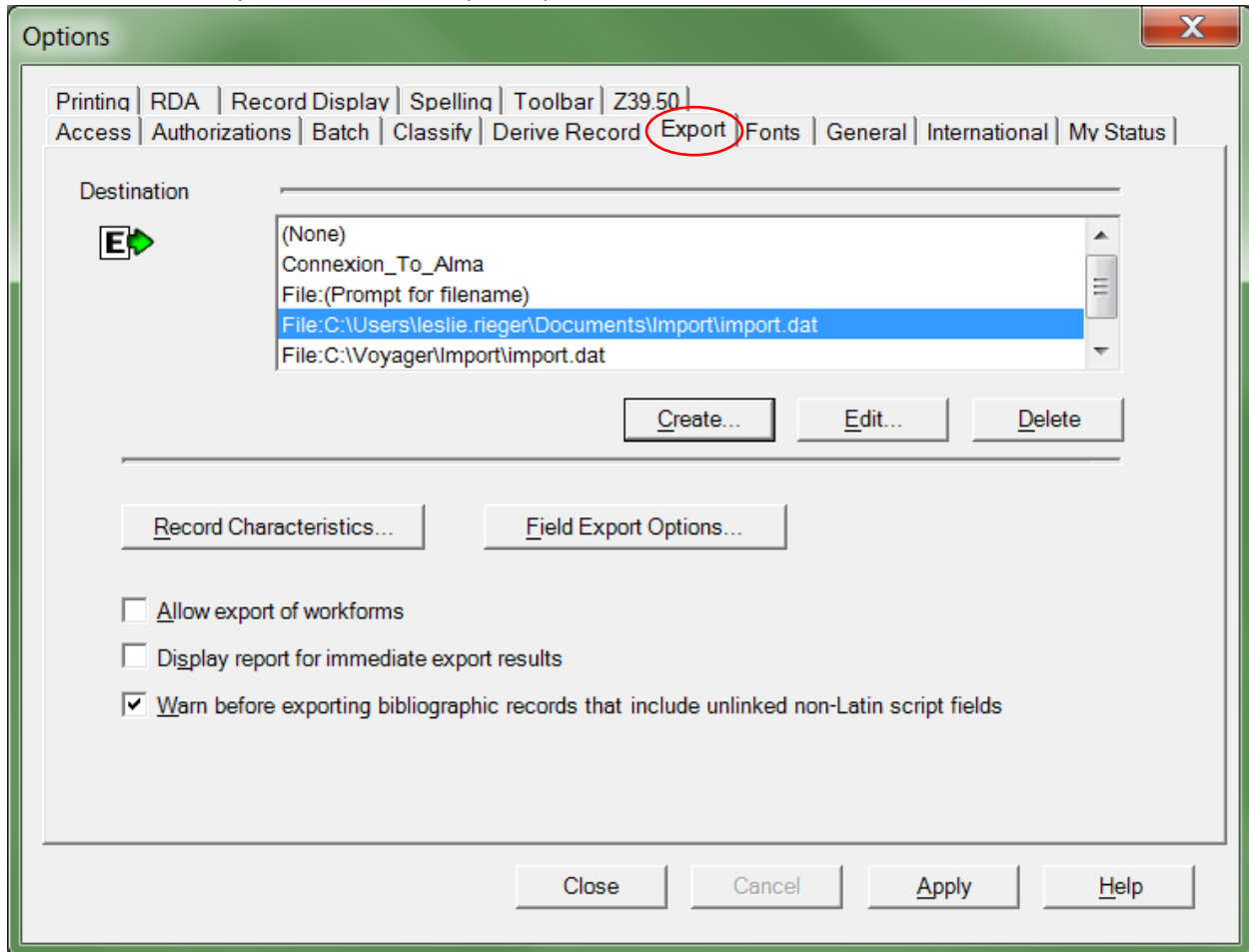
6. Pull up your record in Alma and continue to the section on [Adding Holdings and Items](#).

## Using a Repository Import Profile


This method is best used if you want to import several records at once. There are two parts of this process – Exporting from Connexion and Importing in Alma.

### Exporting from Connexion

1. Check the settings in **Tools -> Options -> Export Tab**. You should have either a path to the file where you want to save the records OR “File: (Prompt for filename)” selected. “File: (Prompt for filename)” allows you to select the location and name your file each time you export.



**TIP:** Make a note of the location of your file so you can easily find it when you Import from Alma.

2. In OCLC, select the record you wish to export, and click on the **ActionExport** button (  ) or select **Export** from the **Action** menu.

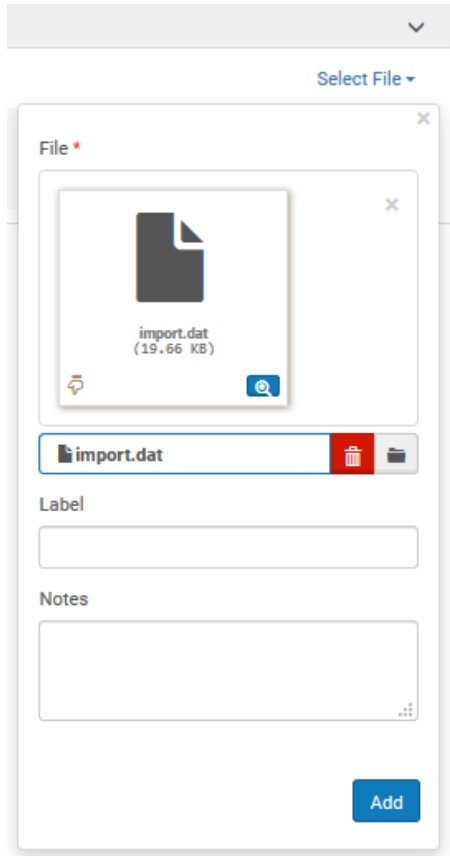


**NOTE:** If you have “Perform local actions in batch: Bibliographic Record Export” selected on the Tools -> Options -> Batch tab, the records will only be MARKED for export, and you will have to run Batch -> Process Batch with “Exports” checked in order to add your records to the export file.

3. Once you have exported all your records, go to Alma.

## Importing the records in Alma

1. **Select Resources -> Import -> Import.**
2. Select the desired profile from the list (if you don't have a profile set up yet, see the tutorial on **Setting up a Repository Import Profile**). Click on the ellipses and choose **"Run"**.
3. Click on the **Select File** dropdown and browse to file you exported your records to. You may also add a label and notes, if desired. This is not required, but may be useful later in identifying your Import job.



4. Click **"Add"**. The file will appear in the Files list. At this point, if you have additional files to import, you can add them by following step 3 for each file.
5. Check to make sure everything is correct and then click **"Submit"**.
6. The Monitor and View Imports screen will open – yours will most likely be at the top. You can identify your file by checking the user field. You can also click Actions and choose **"View File Details"** to see the label and notes information, if you filled in those fields.
7. Wait for the import to complete. The larger the file, the longer it will take. Click the Refresh button to see updated information. When the import is complete, you will also receive an e-mail.
8. Once the import is complete (the **"Files Processed"** column will show 100% and a green bar), click the ellipses button. Choose from the following:



- a. Report – this option will give you general statistics about the records imported. It also gives more detailed information about matches, records imported, and records not imported. From the report, you can also choose Ellipses -> Preview records next to any line of records imported. This will take you to the same view as “c” below. If you expected records to import and they didn’t, the report is a good place to look for clues.
- b. Imported Records in IZ – this option shows you a list of the records you imported in the Institution Zone. In this view, you will see a line for Availability with each title which includes information on the library, location code, and call number (if you imported new records with no holdings yet attached, this information will not be included). In this view, you can also save your records as a set by clicking the Save Query button.



**TIP:** If you save your records as a set, you can navigate to [Admin -> Manage Sets](#) and click on the ellipses next to your set to choose “[Catalog Set](#)”. This will open all of the records in your set in the Metadata Editor (up to 200 records!) so that you can add holdings and items to all of them without having to back out and find each record individually.

- c. Imported Records in NZ – this option shows you a list of the records you imported in the Network Zone. In this view, there is a line that says “Held by” followed by a number. You can click on this to see what institutions hold this record. Notice that the Save Query button does not appear in this view.


9. If everything imported correctly, navigate to the folder on your hard drive which contains your file and delete it. If you don't delete it manually, and you use the same file name the next time you export, Connexion will continue to add records to the same file.
10. Continue to the section on [Adding Holdings and Items](#).

## Holdings and Items

Once you have identified a bibliographic record and brought it into the system (or found one that someone else in the consortium has already brought into the system), you will need to create holdings and items (or edit existing holdings and items, if they were created at the time of order).

### Holdings

To create new holdings:


1. With your bib record open in the Metadata Editor, choose **Add New Holdings**
  - a. Click this button on the toolbar: . - OR -
  - b. Press **Ctrl + Alt + H**. - OR -
  - c. Select **File -> New -> MARC21 Holdings** from the menu.



**TIP:** If you find that you frequently create new holdings with a lot of the same information, you can create a template! See the Holdings Templates Tutorial for more information.

2. The new holding form will open in a split screen to the right of the bib record.




**TIP:** You may want to open the holding in full screen. If so, click anywhere in the holding record and then click on the **Split Editor** button () or press **F6**.

3. Update the LDR and 008 fields as necessary
4. Click in the 852 field
  - a. Update the first indicator according to the call number scheme used (See [MARC Holdings 852](#) for help)
  - b. Fill in subfield 'b' with your library
  - c. Fill in subfield 'c' with the appropriate location code




**TIP:** With your cursor in the field you want to edit, press **Ctrl + F** or choose **Edit -> Open Form Editor** from the menu. This is especially useful for the LDR, 008, and 852 b & c fields as the editor will provide drop-down menus with your options. Close the editor by clicking somewhere else in the record or pressing **ESC**.

5. Add your call number information (if you have Alma configured to do so, and the call number you want to use is in the bib record, you can press **Alt + U** and it will fill in the call number for you). If you aren't using the Form Editor, pressing **F9** will create a new sub-field.
6. Add any additional information (853/63 pairs, etc.) as necessary (Add a new field by pressing **F8**).
7. Save the holding
  - a. Click the **Save** button () on the toolbar. - OR -


- b. Press **Ctrl + S**. – OR –
- c. Select **File -> Save Record** (or **File -> Save and Release Record**) from the menu.



**NOTE:** If your record already has holdings (for example because they were created at the time of order) and you just need to edit them, select the bib record and then click the **View Inventory** button (  ). Click on **“Edit”** and edit the fields as necessary.

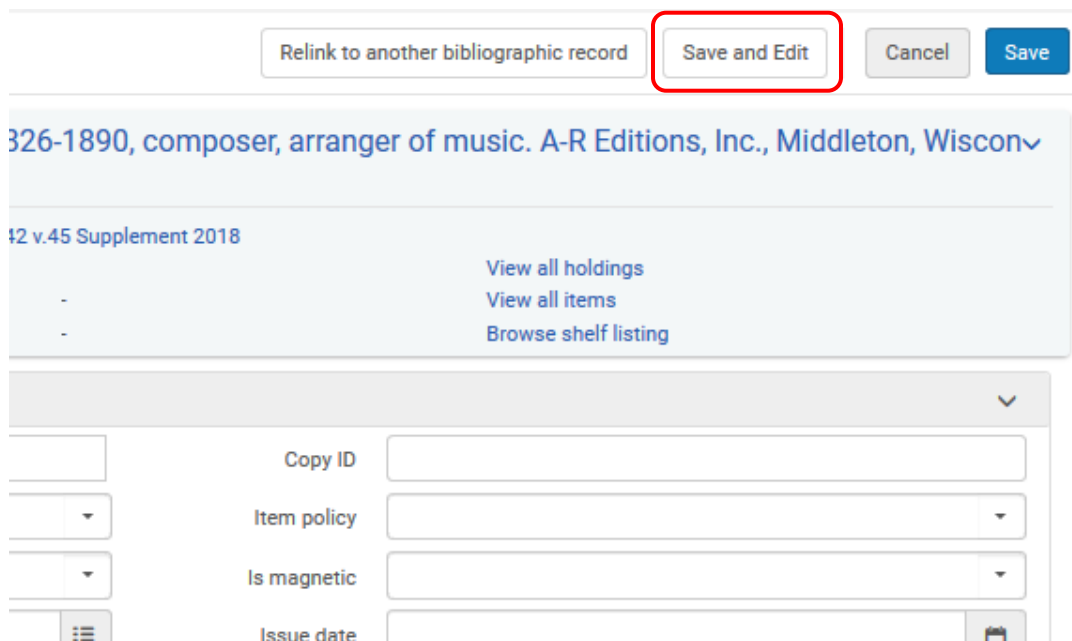
## Items

To create new items:

1. With your cursor in the holding record, choose Add Item:
  - a. Click the **Add Item** button (  ) in the toolbar. – OR –
  - b. Press **Alt + I**.
2. Fill in the appropriate fields per your institution’s policies. (Note: if you are using a barcode scanner, save that field for last as it will save and exit the item record.)
3. Save the Item




**TIP:** Only the General Information tab appears in a new item, so if you need to enter notes or other information that’s not on that tab, click the **Save and Edit** button – this will cause the other tabs to appear but will not close the item.



The screenshot shows a library system interface. At the top, there are four buttons: "Relink to another bibliographic record", "Save and Edit" (highlighted with a red box), "Cancel", and "Save". Below the buttons, the text "326-1890, composer, arranger of music. A-R Editions, Inc., Middleton, Wiscon" is visible. Underneath, there is a section titled "12 v.45 Supplement 2018" with links for "View all holdings", "View all items", and "Browse shelf listing". The bottom part of the form contains several input fields: "Copy ID", "Item policy", "Is magnetic", and "Issue date".

If you need additional items, repeat steps 1-3.

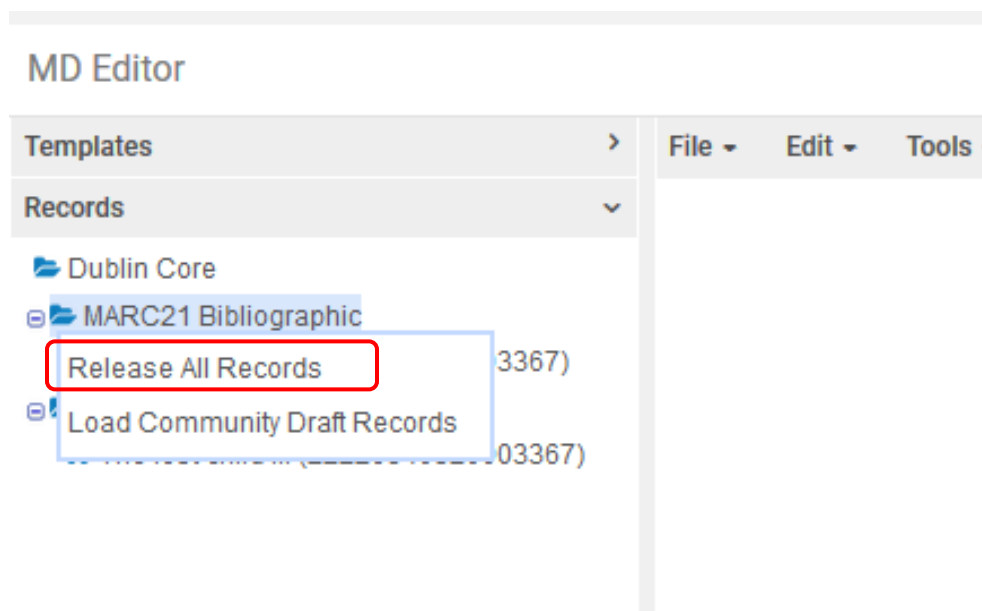


**NOTE:** If your record already has an item (for example because they were created at the time of order) and you just need to edit it, select the bib record and then click the **View Inventory** button (  ). Click on the

ellipses and then on [View Items](#). The List of Items screen will open. Choose the Item you wish to edit and click on the ellipses to the right. Choose “[Edit](#)”. Edit fields as necessary.


## Finishing Touches

Once you have completed editing/creating Bibs, Holdings, and Items, go back to the Metadata Editor and release your records. You can release all of the records at once by clicking on [MARC21 Bibliographic](#) (or [MARC21 Holdings](#)) on the left side of the screen and choosing [Release All Records](#) from the dropdown. If you choose this method, be sure to do it for both MARC21 Bibliographic and MARC21 Holdings.



Alternatively, each record can be released individually by selecting the record and choosing [File -> Save and Release Record](#) (Ctrl + Alt + R) – OR – [File -> Release Record](#) (Alt + Shift + R) from the menu.

If your institution uses Work Orders, you may need to scan the item into a new status. To do this:

1. Click on the [Clipboard Icon](#) at the top right of the screen ()
2. Select [Items – in department](#).
3. Click the [Scan In Items](#) button.
4. Select the [Status](#) you wish to use from the dropdown (or if you are scanning the item out of your area, click “[Yes](#)” next to Done)
5. Scan the item(s) barcode(s).