Note: In addition to the mp4 video files on this CourseSite, you can find the original ExLibris videos (clunky… hard to pause for example and might not work properly in some browsers) on the Admin Cert website. They include the end-of-video quiz questions (the mp4s do not) that have been bundled into this course’s review document, which, with answers, will be made available by the end of the four week course.

Resources 01: Search Configuration

The Alma search configuration video may slightly overwhelm. The video jumps right in but browsing Resource Management in the Exlibris Knowledge Center for a bird’s eye view, or searching therein for a term glossed over, might be helpful.

In Alma, you can search different indexes via the search box’s limiter dropdown, which displays indexes like: physical items, physical titles, electronic items, digital files, etc.

Each of these indexes contains different types of objects (perhaps the most important object type is BIB_MMS, the only object type for the title index). Object types contain fields. So… Index ->Object types->fields. The BIB_MMS object contains ‘creator’ and date_of_publication’ fields, for example.

Alma uses a mapping table to map fields back to the index. Per the video “the easiest way to view the object-type to index relationships is to download the object-type search-index code-table to Excel” via the icon as pictured here:

In Alma, you can customize field labels via the configuration menu.
Resources 02: Normalization Rules

Videos 2-6 on Normalization, indication rules, match methods, and merge methods all involve editing records either in the editor or via a process.

If you Google ‘Alma and drools’ information on normalization rules will be returned, but drools, in this case, is not a verb. Rather, it’s a noun having to do with a Java process/job used for normalizing records (see drools.org).

Alma provides out-of-the-box normalization-rule-templates that are usually configured via Alma’s built-in Metadata Editor, MDeditor for short. These rules can - for individual records or in batch - add, remove or replace fields and subfields in bib and holdings records.

Normalization rules involve if/then logic to identify and take actions on records.
After you edit/create a rule, you can test it in the MDeditor by applying it to an individual record before including it in a profile for editing multiple records at a time.

**Resources 03: Normalization Processes**

Rather than working with an individual record, this video describes using normalization rules on sets of records via a process. Alma has a three-step wizard for creating these processes.

There is a lot that's of interest in this video, like automating normalization of records that are imported (import profiles) from an external search, say of the Library of Congress, but you'll have to see/watch it to believe it.

To summarize, here is a table of where normalization rules can be used and how they are accessed in Alma configuration menu:
Resources 04: Indication Rules

Indication rules are used to filter sets of records using metadata elements that may or may not be indexed in Alma. In this, they are useful for records that might otherwise be hard to identify. Records identified by an indication rule are saved in a subset for editing/correction.

It can be run as a job or used as a task to correct data in import profiles.

In the MEditor, you will find default indication rules provided by ExLibris. These are located in the Rules tab of the editor in the Shared folder. In MEditor, you split the editor window to test a rule on a record as pictured here:
Resources 05: Match Methods

Match methods identify duplicates in records.

There are 3 ways to import records into Alma as pictured in this video screenshot:

Creating /Importing Bib Records

- Using the MD Editor to create new bib records.
- Using the MD Editor import via External Search Resources.
- Import via Integration Profile (e.g., OCLC Connexion).

You can use the tools menu of the MDeditor to select “Find Matching Records” but the more common use case is when importing records via an external search, an import profile, or an integration profile (like an OCLC connection).
Resources 06: Merge Methods

When duplicate records are found via the match method they can be merged, you guessed it, by merge methods. Merge methods are very similar to normalization rules but work with two records instead of one. Of the two records, the non-'preferred record’ is merged into the preferred record. Only during an ‘external search’ for records is the local record not the preferred record.

Resources 07: Import Profiles Part I: Descriptive Metadata

There are different types of import profiles as pictured here.

<table>
<thead>
<tr>
<th>Import Profile Type</th>
<th>Profile Use Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repository</td>
<td>Import of bibliographic information and the creation of physical/electronic inventory</td>
</tr>
<tr>
<td>New Order</td>
<td>Import of bibliographic records with embedded order data (EOD), resulting in the import of bibliographic information and the creation of PO lines and physical/electronic inventory</td>
</tr>
<tr>
<td>Update Inventory</td>
<td>Used for updating inventory associated with PO lines, based on the vendor reference number or PO line reference number</td>
</tr>
<tr>
<td>Digital</td>
<td>Used for loading digital objects or bibliographic records as remote representations</td>
</tr>
<tr>
<td>Collection</td>
<td>Used for loading collection tree and related bibs (not titles)</td>
</tr>
</tbody>
</table>

This video discusses the repository import profile and walks through how to use the wizard to create a new repository import profile. Indication and normalization rules can be added to the import profile during the creation wizard:
Step four of the wizard involves applying match methods, and, if appropriate, merge options.

**Resources 08: Import Profiles Part II: Inventory Creation**

Step six of the repository import profile wizard involves creating inventory (optional) for the imported bib records, be they physical, electronic, or mixed items.

‘Electronic’ can be a standalone record or a record that is part of a collection, and this video discusses the options in the wizard for each. The operation for physical inventory has the option of creating items and holding information. This is discussed in the last segment of the video and is important to watch.
Resources 09: Metadata Configuration and Controlled Vocabularies

In Alma Config -> Resources tab-> Cataloging heading -> ‘Metadata Configuration’ link, various metadata profiles can be configured. Of the profiles available, this video discusses how to edit the MARC21 bibliographic metadata profile.

In addition to the fields and subfields that can be configured, normalization rules can also be added and configured here.
The portion of this video on controlled vocabularies is most likely optional as the odds of editing one of the out of the box, aka OTB, or adding a new vocabulary, is not high given the to-do list of configurations.

**Resources 10: Brief Record Levels**

There are 10 levels of record-completeness-- one being the least complete or briefest and ten being the most complete. The levels help identify which records can be overlaid.

There are ‘brief level rules’ which can be accessed through the MDeditor the same as normalization rules and indication rules.

![MD Editor Diagram](image)

The OTB rules cannot be edited but must be copied.

It’s pretty cool how the system determines the level of brevity by using these rules, and you should check it out, but it’s likely OTB will serve without any editing.
Resources 11: Cataloger Permission Levels

All catalogers are created equal in Alma, however, east of eden, ExLibris can enable hierarchical cataloging privileges. This is a short simple video.

Resources 12: Record Export

This video has to do with Alma publishing profiles. Publishing means sending bib information to Primo, or Scholar or other discovery service. This is an important concept and the content of this video should be understood even if the OTB profiles are all you'll ever need. Though maybe the SLC can help us setup a profile for an RSS feed of new books.

Resources 13: Call Number Parsing, Barcode Generation, and Description Templates

Call number layout, barcode generation parameters and the description template (vol. No. Year etc.) are configured in the Resources tab under the General heading. ExLibris configures these settings during implementation, and they are unlikely to be afterwards customized. When/if they are, you are probably more likely to read the appropriate documentation than watch a video.

Resources 14: Call Numbers, Libraries, and Locations

This video describes the call number mapping table (mapping bibs to holdings), which is also located under the general heading of the Resources tab, and when the table is accessed (updates, imports, holding changes)