



Resource Management in consortia environment and adding inventory without ordering

Svetlana Smirnov
2020

ExLibris
Alma

ExLibris[®]
a ProQuest Company

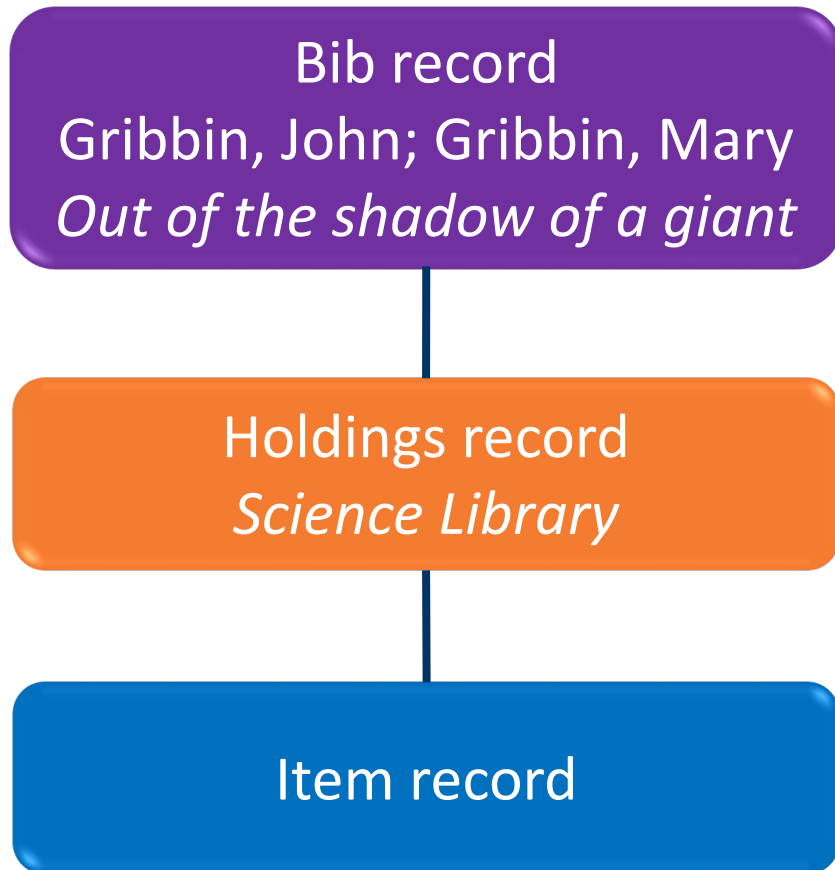
Session Objectives

- Review workflows for creating new inventory records (physical and electronic) in Alma without using acquisition ordering process and linking institution inventory to NZ master record.
- Session Goals:
 - Go through physical and electronic inventory creation workflows in Alma with using Network and Community Zones



- Add institution holdings to the NZ record
- Relink IZ holdings to master NZ record, share and match to the NZ record
- Create new holdings and items in Alma Metadata Editor and add item and holdings to existing records
- Add holdings and items using Quick Cataloging
- Activate single electronic portfolio from the CZ
- Activate electronic package from the CZ

Physical Records Data Structure





Adding institution holdings to existing NZ record / Relink IZ holdings to NZ record

Add institution physical inventory to existing NZ record

- From NZ 'All Titles' search select record to 'Link' from NZ and/or 'Edit Record' from NZ search to add inventory directly to it

The screenshot displays a library catalog interface. The top navigation bar includes 'Electronic (1)', 'Digital', 'Held by (2)', and 'Other details'. The main record is titled 'Twentieth-century art from the Nelson Aldrich Rockefeller Collection.' and is identified as a 'Book (Book - Physical)'. The record number is 73077512. The 'Edit Record' button is highlighted with a purple box and an arrow. A 'Record View' modal is open, showing a 'Link' button also highlighted with a purple box. The modal displays the following metadata:

MMS ID	99123552300501	Suppress from publishing	No	Export to WorldCat	Don't publish
Brief level	10	Record Format	marc21		
Originating system	ILS	Originating system ID	9915754700501	Originating system version	-

Relink IZ holdings to master NZ record

- From IZ search results select Holdings record

The screenshot shows a search results page for the book 'A kindness / Cynthia Rylant'. The search criteria are 'Keywords (OCoLC)37153'. The record is highlighted with a red box. A red circle highlights the 'Holdings' link in the top right corner of the record details.

A kindness / Cynthia Rylant.
Book (Book - Physical) By Rylant, Cynthia. (New York : Orchard Books c1988.)
Subject: Mothers and sons--Fiction. Babies--Fiction. Single-parent family--Fiction.
Language: English MMS ID: 99230068805889
ISBN: 0531057674 : and others
Creation Date: 01/08/2020 15:33:54 CDT
Modification Date: 01/08/2020 15:33:54 CDT
Record number: 99230068805889
Physical (1)

The screenshot shows the 'List of Holdings' page for the book. A table lists the holdings with columns for ID, Suppressed, Library, Location, Call Number, Copy Id, Access Number, No. of Items, Available, and PO Line. A red circle highlights the 'Relink' option in the context menu for the first holding.

A kindness / Cynthia Rylant. Rylant, Cynthia. Orchard Books New York : c1988. [0531083675 (lib. bdg.)]

1 - 1 of 1 Call number [input field] [search icon]

Filter: All Library: All Location: All

ID	Suppressed	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line
1	<input type="checkbox"/>	Memorial Library	Collections	PZ7.R982 K1 1988	-	-	1	1	-

View Edit Relink View item Relink Associate a PO Line

The screenshot shows the 'Relink' dialog box. The 'Network' radio button is selected and highlighted with a red circle. The search criteria are 'Institution: Any Field', 'Title: kindness', and 'System Number: 37153'. The 'Search' button is highlighted with a red circle.

Institution Network Community

Find: Any Field

AND Title Contains Phrase kindness

AND Creator Contains Phrase

AND Subjects Contains Phrase

AND ISBN Contains Phrase

AND ISSN Contains Phrase

AND System Number Contains Phrase 37153

AND Year of Publication Equals

Cancel Clear Search



Adding Holdings and Items Records

Add a Holdings Record

Record saved at 1:42:51 PM. You have 1 warning(s) in your record

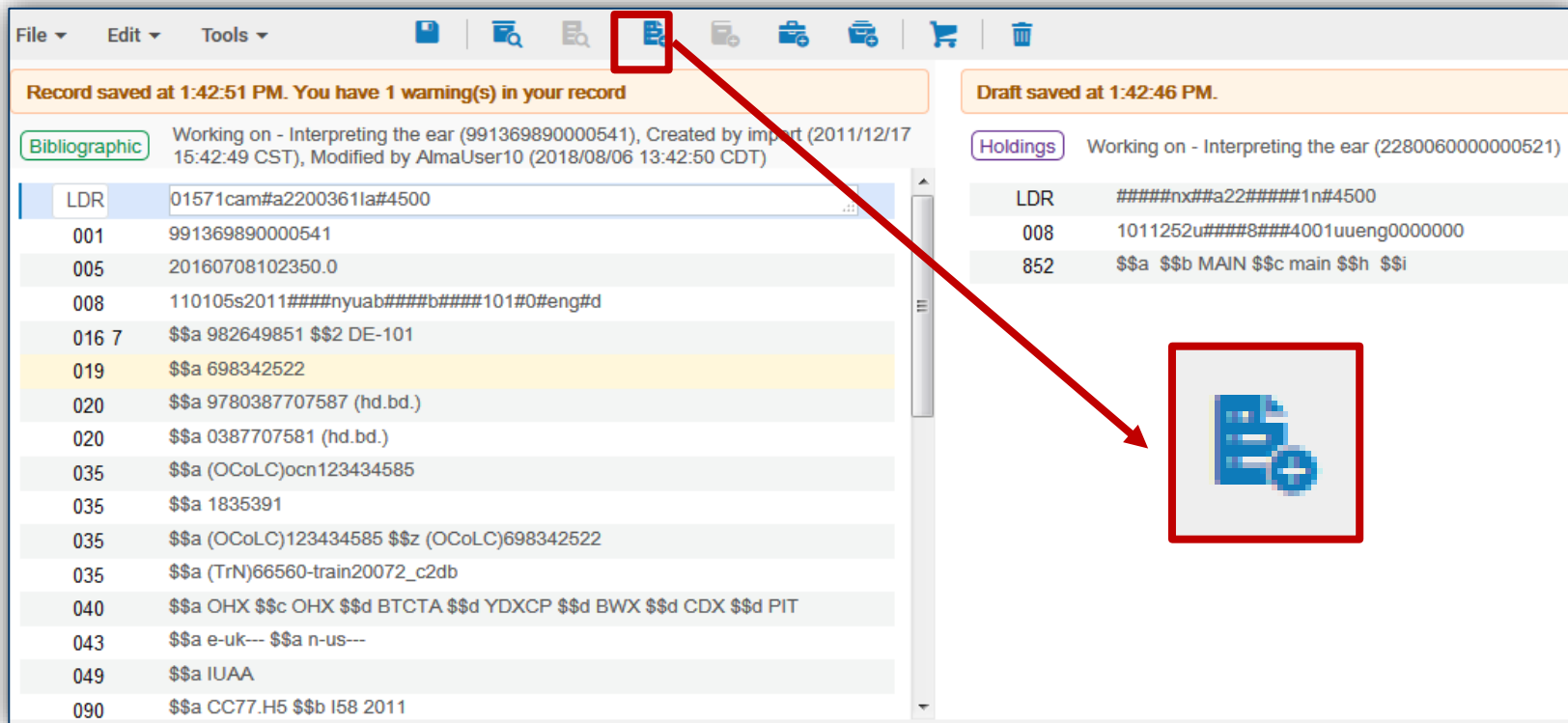
Bibliographic Working on - Interpreting the ear (991369890000541), Created by import (2011/12/17 15:42:49 CST), Modified by AlmaUser10 (2018/08/06 13:42:50 CDT)

LDR	01571cam#a2200361la#4500
001	991369890000541
005	20160708102350.0
008	110105s2011####nyuab####b####101#0#eng#d
016 7	\$\$a 982649851 \$\$2 DE-101
019	\$\$a 698342522
020	\$\$a 9780387707587 (hd.bd.)
020	\$\$a 0387707581 (hd.bd.)
035	\$\$a (OCoLC)ocn123434585
035	\$\$a 1835391
035	\$\$a (OCoLC)123434585 \$\$z (OCoLC)698342522
035	\$\$a (TrN)66560-train20072_c2db
040	\$\$a OHX \$\$c OHX \$\$d BTCTA \$\$d YDXCP \$\$d BWX \$\$d CDX \$\$d PIT
043	\$\$a e-uk--- \$\$a n-us---
049	\$\$a IUAA
090	\$\$a CC77.H5 \$\$b I58 2011

Draft saved at 1:42:46 PM.

Holdings Working on - Interpreting the ear (2280060000000521)

LDR	#####nx##a22#####1n#4500
008	1011252u#####8###4001uueng0000000
852	\$\$a \$\$b MAIN \$\$c main \$\$h \$\$i



Add a Holdings Record Via Template

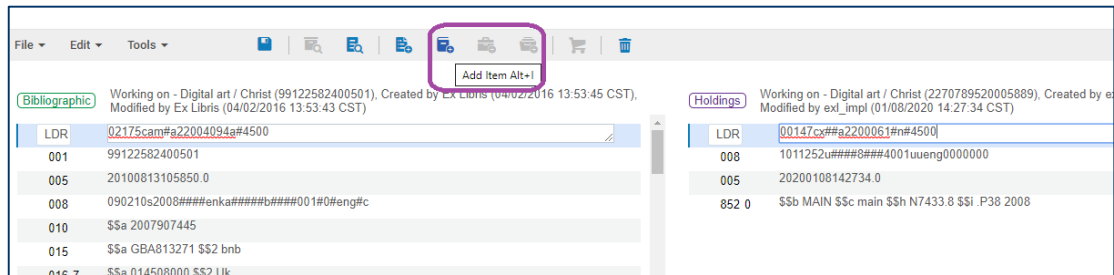
Alma has attempted to link the bib headings to authority records while loading the record. Loading the record.

Bibliographic Working on - Versions of academic (9925741300521), Created by connie.braun (2014/11/12 0

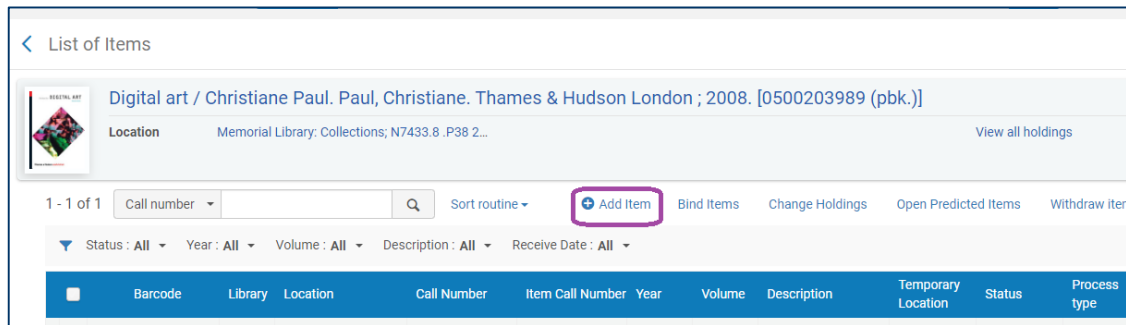
LDR	01485cam##22003378i#4500
001	9925741300521
005	20141112163217.0
008	140401s2014####ilu#####b####001#0#eng#c
010	\$\$a ^2014013079
020	\$\$z 9780226170251 (e-book)
040	\$\$a ICU/DLC \$\$b eng \$\$e rda \$\$c ICU
042	\$\$a pcc
043	\$\$a n-us---
050 0 0	\$\$a KF4772 \$\$b .F5677 2014
082 0 0	\$\$a 371.1/04 \$\$2 23
100 1	\$\$a Fish, Stanley Eugene, \$\$e author.
245 1 0	\$\$a Versions of academic freedom : \$\$b from professionalism to revolution / \$\$c Stanley Fish.

Create new items in Alma Metadata Editor

- In MD Editor add item from Holdings record

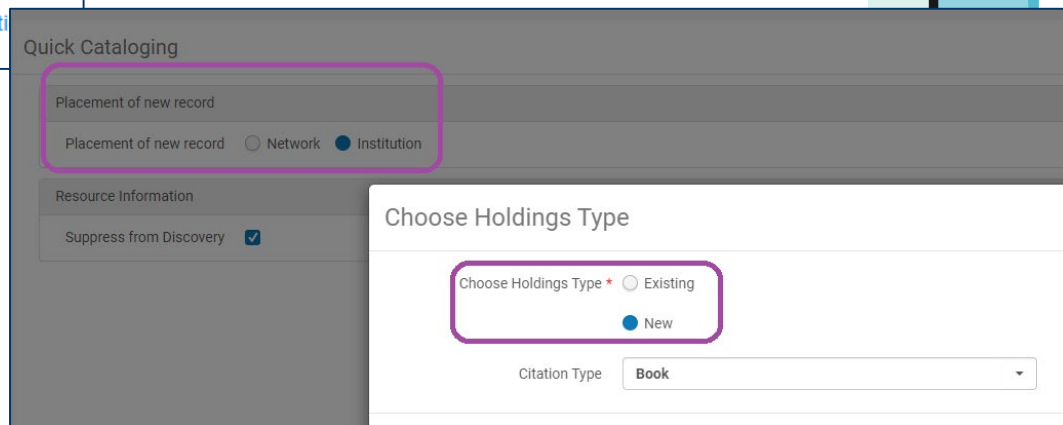
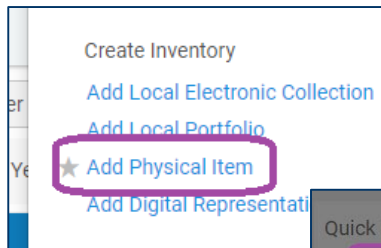


- Add Item from List of Items screen



Add holdings and items using Quick Cataloging

- Quick Cataloging under Resources – Create Inventory – Add Physical Item



Locked Records

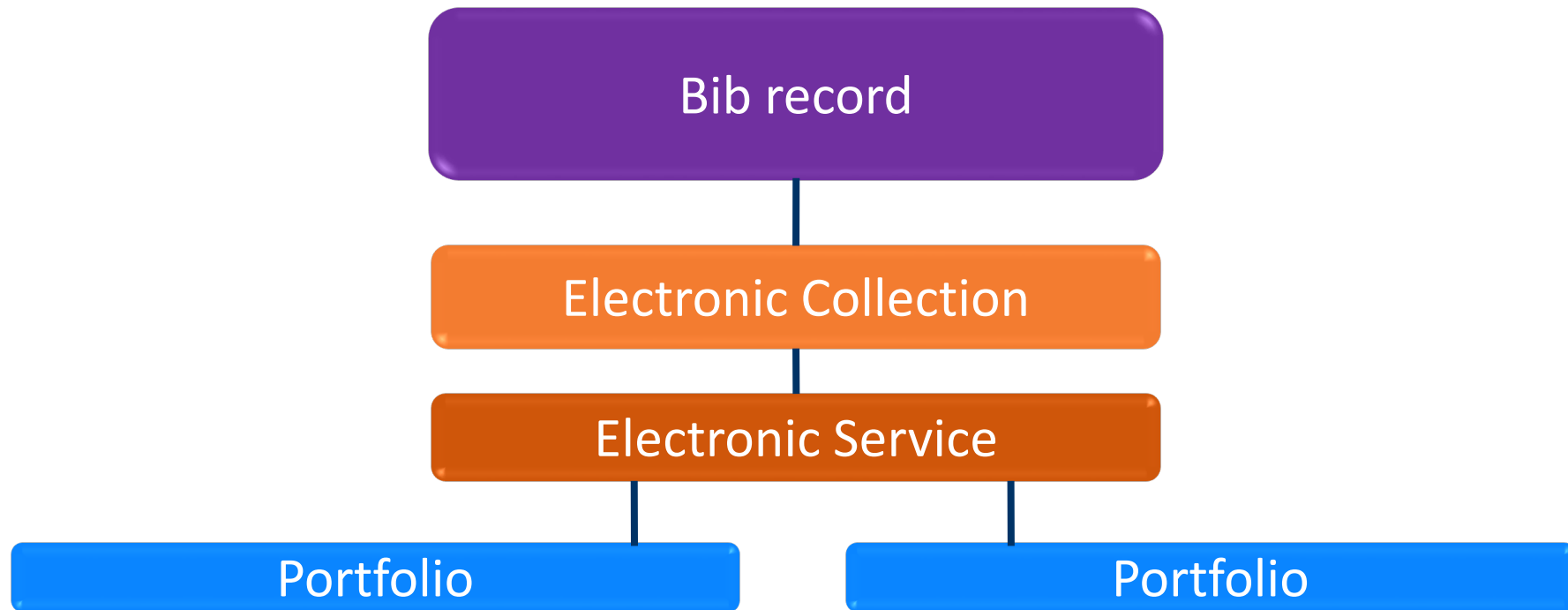
Bibliographic Versions of academic freedom : \$b from professionalism to revolution / \$c Stanley Fish. **View Only - locked by AlmaUser10 (edited less than 1 hour(s) ago), Cr**

LDR	01480cam##22003378i#4500
001	9925741300521
005	20180806140922.0
008	140401s2014#####ilu#####b###001#0#eng#c
010	\$\$a ^2014013079
020	\$\$z 9780226170251
040	\$\$a ICU/DLC \$\$b eng \$\$e rda \$\$c ICU
042	\$\$a pcc
043	\$\$a n-us---
050 0 0	\$\$a KF4772 \$\$b .F5677 2014
082 0 0	\$\$a 371.1/04 \$\$2 23
100 1	\$\$a Fish, Stanley E., \$\$c 1938 - \$\$e author.
245 1 0	\$\$a Versions of academic freedom : \$b from professionalism to revolution / \$c Stanley Fish.



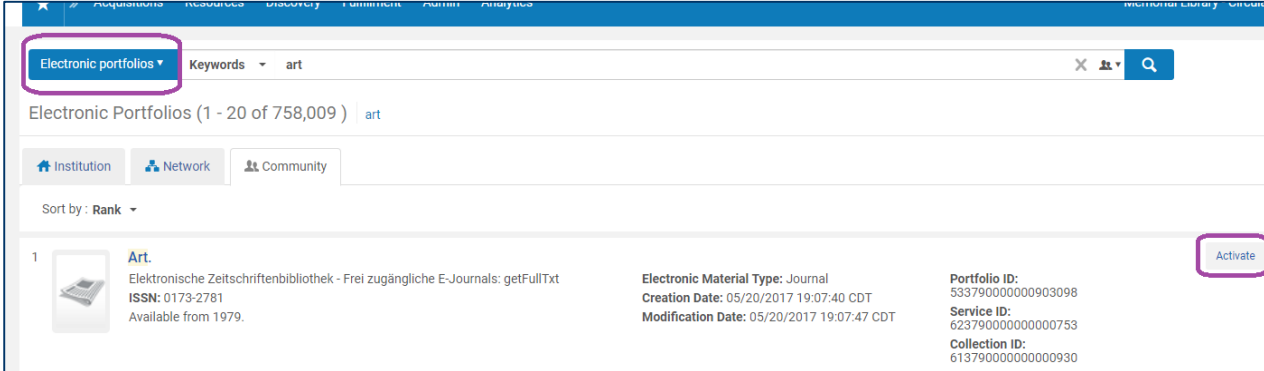
Activating Electronic Portfolio and Collection from CZ

Electronic Records Data Structure



Activate electronic portfolio from CZ

- Search CZ Electronic portfolios and Activate the resource



The screenshot displays the ExLibris interface for searching electronic portfolios. At the top, there is a navigation bar with tabs for 'Acquisitions', 'Resources', 'Discovery', 'Fulltext', 'Home', and 'MyLibrary'. Below this is a search bar with a dropdown menu set to 'Electronic portfolios', a search type dropdown set to 'Keywords', and the search term 'art'. The search results show 'Electronic Portfolios (1 - 20 of 758,009) | art'. There are filters for 'Institution', 'Network', and 'Community', and a 'Sort by: Rank' dropdown. The first result is 'Art', which is an 'Elektronische Zeitschriftenbibliothek - Frei zugängliche E-Journals: getFullTxt' with ISSN: 0173-2781, available from 1979. The 'Electronic Material Type' is 'Journal', the 'Creation Date' is '05/20/2017 19:07:40 CDT', and the 'Modification Date' is '05/20/2017 19:07:47 CDT'. The 'Portfolio ID' is '533790000000903098', the 'Service ID' is '62379000000000753', and the 'Collection ID' is '61379000000000930'. An 'Activate' button is visible next to the result.

Activate electronic collection from CZ

- Search Electronic Collections in the CZ


The screenshot displays the ExLibris search interface. At the top, a search bar contains the text 'Alexander Street Press Art and Architecture in Video United States'. A dropdown menu on the left of the search bar is set to 'Electronic collection'. Below the search bar, the results are filtered to 'Electronic Collections (1 - 20 of 31)'. The interface includes tabs for 'Institution', 'Network', and 'Community', and a 'Sort by: Rank' dropdown. The first result is 'Alexander Street Press Art and Architecture in Video United States', which is highlighted. To the right of the result, there is a 'Portfolio List (770)' and an 'Activate' button. The 'Activate' button is circled in red. The result details include: Type: Selective package, Service: Full Text, Interface name: Alexander Street Press, Linking Level: Book, Creation Date: 10/25/2017 12:21:23 CDT, and Modification Date: 01/04/2020 18:56:23 CST. The Collection ID is 61379000000001341.

Electronic collection ▾ Keywords ▾ Alexander Street Press Art and Architecture in Video United States X [User Icon] [Search Icon] Advanced

Electronic Collections (1 - 20 of 31) Alexander Street Press Art and Architecture in Video United States

Institution Network Community

Sort by: Rank ▾ [Share Icon]

1  Alexander Street Press Art and Architecture in Video United States

Type: Selective package
Service: Full Text
Interface name: Alexander Street Press
Linking Level: Book
Creation Date: 10/25/2017 12:21:23 CDT
Modification Date: 01/04/2020 18:56:23 CST

Collection ID:
61379000000001341

Portfolio List (770) Activate

Documentation

Alma Inventory Model

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/010Introduction_to_Alma_Inventory](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/010Introduction_to_Alma_Inventory)

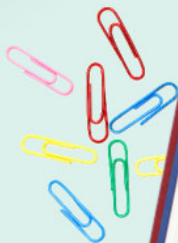
Managing Physical resources

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/040Managing_Physical_Resources](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/040Managing_Physical_Resources)

Managing Electronic Resources

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Activating_Electronic_Resources](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Activating_Electronic_Resources)
- https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Workflows/Alma_ERM_Workflows/C_Activating/A_Activating_Electronic_Portfolios_from_the_Community_Zone
- https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/How_to_activate_an_Electronic_Collection_from_the_Community_Zone%3F
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/020Managing_Electronic_Resources](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources)





Thank you!

Svetlana.Smirnov@exlibrisgroup.com

