

# Alma Essentials: Resource Management - Metadata Editor

## Training Materials

- [Metadata Editor](#)
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## Hands-on Exercises

*Roles needed for these exercises: Cataloger, Physical Inventory Operator (Exercise 4)*

Using your sandbox, **sign in as AlmaUser01** (or any account with the roles indicated above) and complete the following exercises. 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.

### Exercise #1: Edit and suppress an existing bibliographic record

1. Perform an **All titles** search and choose a record.
2. Click **Edit Record** to open the record in the MD Editor.
3. Click **Editing Actions**, then **Add Field**.
4. Add a MARC field to the record, for example, a note field:
  - a. Enter 990 for the MARC field.
  - b. Leave the indicators blank.
  - c. Add some note text after \$\$a.
5. Click **Save** to save and validate the edited record.
6. Click **Record Actions**, then check the box to **Suppress from Discovery**.
7. Click the dropdown next to **Save**, then choose **Save and Release Record** to save your changes and release the record so other users can make edits.

## Exercise #2: Create a new brief bibliographic record from a template

1. Click **Show MDE** from the Alma menu (if the MD Editor is not already open).
2. Click **New**, then under MARC21 Bibliographic, choose the **Books (Default)** template.
3. Add information to the 245 field and any other fields as desired.
4. Click **Save**.
5. Use the persistent search box to search for the record you created. You should see your brief record appearing with no inventory attached.

## Exercise #3: Use an external search resource to enhance your brief record (copy cataloging)

1. Click **Show MDE** from the Alma menu or click **Edit Record** for your brief record.
2. With the brief record displayed in the MD Editor, click **Search & Browse**, then **Search Resources**.
  - a. This will open the external search in the editor split mode.
3. From the **Search Cataloging Profile** dropdown, choose **Library of Congress**.
4. Refine the automatically populated search fields as needed, then click **Search**.
5. Click **View** to see the details for retrieved records.
6. Choose your desired record, then from the Import dropdown, choose either **Copy & Overlay** or **Copy & Merge**.
  - a. Copy & Overlay will completely replace your brief record with the record from the external resource.
  - b. Copy & Merge will merge the external record with your local brief record using defined merge rules.
  - c. Merge Preview can be used to see a preview of how the Copy & Merge will be performed.
7. Click **Execute**.
8. The existing record should now be enhanced with the data from the external resource.
9. Click **Save**.

## Exercise #4: Add physical inventory to the record

1. Click **Add Inventory**, then under Add MARC21 Holdings, choose the **Books Default Template**.
  - a. This will create a new holdings record and open it in the editor split mode.
2. Click in the 852 field, then open the form editor using one of the following methods:
  - a. Press **Ctrl+F** on the keyboard.
  - b. Click the row actions menu (ellipsis) and choose **Open form editor**.

- c. Click **Editing Actions** and choose **Open Form Editor**.
3. Select the library and location for the holding using the dropdown options for 852 subfields b and c.
4. Define any other values for the holding as desired.
5. Click **Save**.
6. With the holdings record selected, click **Add Inventory**, then **Add Item**.
7. In the **Physical Item Editor**, add item information as desired, such as adding a Barcode.
8. Click **Save** to create the item.
9. When finished, click **Record Actions**, then **Release Record** to release the holdings record from your MD Editor list.
10. Click on the **MARC21 Bib** tab and release the bibliographic record using one of the following methods:
  - a. Click the **Release displayed records in list** option to release all records displaying in the list.
  - b. Open the bibliographic record, click **Record Actions**, then **Release Record**.
11. Use the persistent search box to search for the record. You should see the enhanced record and the newly created physical inventory.