Orbis Cascade Alliance
New Staff Training Group for Resource Management
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The New Staff Training Group for Resource Management was charged with outlining topics for developing training materials to meet the needs of Alliance institutions when training new resource management staff or staff taking on new resource management responsibilities. We found the work of the earlier New Staff Training Group for Acquisitions to be a very useful model and have followed a similar approach. In fact, some of the more general topics at the beginning and end of this training outline are adapted from the Acquisitions outline.

Resource management in Alma covers a wide range of activities and resources, including physical and electronic resources of all publication types. Awareness of consortial policies is important in any shared bibliographic database, but especially so in the Alliance's implementation of the Network Zone, populated with WorldCat master records. The group thought it would be helpful to anyone developing training to include not only the general, fairly obvious topics that need to be addressed in training but also specific things that have been challenging in our environment or are not well documented. Hence this outline is lengthy and contains a significant level of detail.

It is not intended that any new staff member would absorb all of this information in a matters of days, weeks, or even months. With training on these topics available, member institutions should be able to use the materials to provide training for their staff based on institutional needs. Once training is developed, the outline could perhaps be condensed to include less detail but still serve as an overview of what staff need to know to work in the various aspects of resource management.

The following topics are included:
Alliance specific training

1. Overview of the Alliance & Contact Points
2. Areas of Alma That Impact the Whole Alliance

General Training (not specific to Resource Management)

1. Introduction to Repository Searching

Resource Management Functional area

1. Connexion and the Network Zone
2. Bibliographic Records
3. Holdings Records
4. Item Records
5. Portfolios
6. Work Orders
7. Manage Sets
8. Metadata Editor
9. Local Fields
10. Record Imports
11. Electronic Resources
12. Database Maintenance for the NZ
13. Physical Processing: Binding and Label Printing

Resource Management Infrastructure

1. Configuring Indexes
2. Integration Profile – OCLC Connexion
3. Call Number Mapping

Other areas

1. Working with order information and inventory
2. Fulfillment
3. Primo

Working in administrative functional area

1. Alma Analytics
2. Running Jobs (Advanced)
3. User Management for Resource Management

Outline of Training Topics for Resource Management

<u>Alliance-specific training</u> *[COPIED & MODIFIED from Acquisitions outline]*

1. OVERVIEW OF THE ALLIANCE & CONTACT POINTS

Description: Covers Alliance mission, organizational structure, membership, purpose of working in Alma/Primo, etc. as well as key training resources and help for working in Alma. Includes key contacts for Resource Management (and other functional areas).

Audience: Anyone in the Alliance, new to Alma

Objectives: Understand the Alliance organizational structure, know where to look for contacts or tools to answer questions

- Create contact lists, identify contacts at member libraries for various issues related to topics in Resource Management
- Other resources for training and help
    - ExLibris Knowledge Center (including Alma Help)
    - Alliance Technical Services Discussion List
    - Alliance web pages
    - Alma-L List

2. AREAS OF ALMA THAT IMPACT THE WHOLE ALLIANCE

Description: In conjunction with the overview training, this will act as an introduction to using Alma as a member of the Alliance. Topics will include: Alliance bibliographic record policies and operational policies, the structure of Alma's three zones, and some basic principles relating to import profiles.

Audience: Anyone in the Alliance, new to Alma

Objectives: Understand the basic infrastructure of Alma's three zones, and where to find more information; Alliance bibliographic record policies and operational policies; and how to apply this to import profiles and record loads.

- Introduction to different zones (IZ, NZ, CZ and how they relate, interact)
    - Recognizing the meaning of icons (including suppression icon)
- Alliance bibliographic record policies (previously called mandates) for shared bibliographic records and Alma operational policies
- Record loads and import profiles (adding records to the NZ)

<u>General training (not specific to Resource Management)</u> *[COPIED & MODIFIED from Acquisitions outline]*

1. INTRODUCTION TO REPOSITORY SEARCHING

Description: Knowing what information is available via a Repository Search and how it is indexed is not always self-evident, but it is important to understand in order to prevent duplication of records and efficiently manage tasks.

Audience: Anyone searching for bibliographic records and physical and electronic inventory in Alma.

Objectives:
- Understand which fields are indexed in each search field
- Understand how the type of search (Physical titles vs. Physical Items, for example) affects which information and record links will be presented

- Understand the Alma concept of inventory: physical (holdings and items), electronic (portfolios)
- Understand the differences in searching the IZ, NZ, and CZ
- Understand what the icons mean
- Understand how the Boolean operators vary between the different Advanced Search options
- Understand how data in the enumeration and chronology fields may affect the brief results display (including advantages/disadvantages of populating the enumeration/chronology fields; use of the term “copies” rather than “volumes”)
- ADVANCED: Understand how to save queries into sets (See also Manage Sets)
- ADVANCED: Know the difference between Logical and Itemized sets
- ADVANCED: Know how to combine sets
- ADVANCED: Know how to export/import a set

<u>Working in the Resource Management functional area</u>

1. CONNEXION AND THE NETWORK ZONE

Description: This training will explain the ways in which OCLC Connexion is the focus for cataloging in Alliance libraries, given our particular model for sharing bibliographic records in the Network Zone (NZ).

Audience: Any staff who create, edit, or import bibliographic records

Objectives:
- Understand Alliance policy on:
  - Cataloging at the WorldCat level
  - Working in Alma and the Network Zone
  - Overlaying records
- Understand the mechanisms for records coming from Connexion into Alma (single record import to NZ, daily loads)
- Understand the importance of setting holdings in Connexion and methods of doing this
- Be aware of the OCLC guidelines on “When to Create a New Record” and know how to apply them
- Understand the importance of editing bibliographic records in Connexion rather than in Alma, and the types of edits that must be done in Alma
- Understand how to correct errors in WorldCat master records or report errors for correction
- ADVANCED: Use the “Control Headings” functionality in Connexion to help ensure correctly formulated authorized access points (ideally most catalogers control headings routinely, but this is labeled “advanced” because catalogers

must know how to correctly formulate and assign access points before controlling)
- ADVANCED: Understand the consequences of WorldCat record merges and splits in the NZ and how to deal with them (*See also Database Maintenance*)

2. BIBLIOGRAPHIC RECORDS

Description: This training will provide a high-level overview of features of bibliographic records in Alma. The intent is not to explain the MARC record structure or cataloging practice but to understand Alma-specific points about how bibliographic records are stored and function and Alliance policies related to bibliographic records. *(See also Metadata Editor)*

Audience: Any staff who create, edit, or import bibliographic records

Objectives:
- Understand the three zones (IZ, NZ, CZ) and that bibliographic records can reside in any zone
- Understand the Alma concept of inventory (physical or electronic) and how it relates to bibliographic records
- Understand different ways to open a bibliographic record (Simple MARC view, Metadata Editor)
    - Understand the labels at the top of the Simple MARC view (Originating system, Brief level, etc.) and how they are used
    - Understand the record locking functionality in the Metadata Editor and how records are released
    - *See Metadata Editor section for further information*
- Understand conventions for the MMS ID (how the numbers are constructed and where they appear)
- Understand Alliance policy on:
    - Records that should and should not reside in the NZ
    - The minimum level of completeness for bibliographic records (Floor Bibliographic Standard) and how to apply it
    - Choice of bibliographic records or treatment (single vs. separate records; provider-neutral records; language of cataloging)
    - Suppression of bibliographic records
    - Editing CZ records
- ADVANCED: Understand how to create “bound-with” records in Alma using the standard method (host bibliographic records)
    - Understand how “related records” function in Alma

3. HOLDINGS RECORDS

Description: Holdings records in Alma contain, at a minimum, location and call number information for a library's physical inventory. They may contain more detailed information about a library's holdings, particularly for serials. Holdings records control the Primo display of location, call numbers, and volumes held by a given library.

Audience: Anyone responsible for adding or maintaining holdings in Alma.

Objectives:
- Learn the format for MARC holdings fields (852-855, 863-865, 866-868), including: location, call numbers, captions, enumeration, chronology, cataloging notes
- Learn how to create and edit holdings records
    - ADVANCED: Learn how to split holdings records in various ways: into separate holdings on one bib record, or split between two or more bib records
- Understand how to relink holdings to another bibliographic record
    - Understand how to relink from the POL, and the how the results differ when relinking from the holdings record
    - Understand the challenges with relinking when an associated item has a request or work order
- Understand the relationship between the data in the holdings record and the Primo display
- ADVANCED: Understand how to set up patterns

4. ITEM RECORDS

Description: Item records identify characteristics of an individual physical item (barcode, copy number, etc.) and show the availability of physical materials in Primo.

Audience: Anyone responsible for adding or maintaining items in Alma.

Objectives:
- Learn how to create item records
- Understand the meaning of each field
    - General Information tab
        - Material type
        - Item policy
        - Receiving date
        - Description
        - Permanent location
    - Notes tab
        - Public note
        - Fulfillment note

        - Internal notes
    - History tab
        - Understand how to use the Item Changes list to track changes to item records and the limitations of the list (changes made in jobs don't appear, etc.)
- Learn how to change location and put an item in a temporary location
    - Understand how to move an item from one holdings record on a bib record to another holdings record on the same bib
- Learn how to withdraw items
    - Understand that the Alma "withdraw" function deletes the item record
    - Understand approaches for retaining withdrawn items, using suppressed locations rather than "withdraw"
- ADVANCED: Automatically generate summary holdings statements based on items

5. PORTFOLIOS

Description: Portfolios identify characteristics of an individual electronic item (URL, etc.) and generate links for access to and coverage of electronic resources in Primo.

Audience: Staff who maintain access to electronic resources in Alma and who are responsible for the electronic resource linking and coverage display in Primo.

Objectives:
- Learn how to create standalone portfolios
    - Portfolio Information tab
        - POL
        - License
        - Public note
    - Linking Information tab
        - URL Type
        - Parser Parameters (override)
        - Proxy settings
    - Coverage Information tab
        - Local vs. Global
        - Date information (includes vol./issue numbers)
- Learn how to activate and deactivate portfolios (standalone and collections)
- Learn how to edit coverage (volume/issue numbers and dates)
- Learn how to update links
- Understand how portfolios work within electronic collections and how to add/edit/delete them.
    - Add collections from CZ
    - Create/activate local collections

    - Add, activate, and deactivate portfolios within collections
    - Add, activate, and deactivate the collections themselves
- Understand the factors to consider when deciding between a standalone portfolio and one in a collection
- How to indicate if portfolio is proxied

6. WORK ORDERS

Description: Work orders are used to monitor the processing of physical items. For example, when an item needs repair a work order can be used to record its status within the repair process.

Audience: Anyone who works with physical items outside the usual circulation tasks may need to use work orders. Some Alliance libraries use work orders extensively; some do very little or not at all.

Objectives:
- Understand the purpose of work orders
- Understand the function of the “out of the box” Acquisitions/Technical Services work order and its impact on receiving, tracking items through cataloging, and Primo display of availability
- Understand how to change the status of an item in a work order
- Understand how to complete or remove a work order
- Understand the different types of work orders, their statuses, and their departments
- ADVANCED: Understand how to create a new work order department, work order type, and statuses

7. MANAGE SETS

Description: Sets can be used for many tasks including making changes to a group of records, exporting metadata, moving a group of records, and running jobs.

Audience: Anyone who needs to gather information about groups of records, manipulate a large number of records in Alma, or run jobs.

Objectives:
- Learn the uses for sets
- Know the difference between itemized and logical sets
- Learn how to create, modify, and add members (records) to sets
- Learn how to combine sets
- Learn how to export/import a set

    - Understand that you get different data when exporting a set to Excel than when exporting from a job (*See also Running Jobs*)
- Understand when to use Manage Sets vs. Analytics
- ADVANCED: Learn how to use indication rules and normalization rules

8. METADATA EDITOR

Description: Covers the activities needed to manage metadata such as bibliographic, holdings, and item records. Explains the limitations of Alma functionality in our NZ environment based on WorldCat master records.

Audience: Anyone who works with metadata (roles: Cataloger, Catalog Manager, Catalog Administrator). Some objectives (e.g., Rules) are for an advanced audience.

Objectives:

- Understand cataloging privilege levels needed to perform the following functions
- Be able to open metadata editor from Alma main menu and from individual records that need maintenance
- Understand the types of edits that can/should be made in Alma (e.g., local fields) as opposed to what needs to be done to OCLC master records (e.g. authority control, expanding/enhancing records, etc.)
- Understand the functions of the LEFT pane of the metadata editor
    - Templates
        - Find and use existing shared templates
        - Copy/edit or create a new template
        - Understand the options for sharing and storing templates in the IZ and NZ and how to avoid sharing institutional templates Alliance-wide
    - Records
        - Understand record types (MARC21 Bibliographic, Holdings, Dublin Core)
        - Understand the meaning of icons
        - Release records from this pane, individually or as a group
    - Rules -- *see Running Jobs*
- Understand the functions of the MAIN pane of the metadata editor
    - View a split or full screen
    - Draft, create, and share a new rule or record (bibliographic, holdings, item, or related)
    - Edit records
        - Add/delete fields
        - Add local field

        - Suppress from discovery (Bibs or holdings)
        - Merge records and combine inventory
        - Copy to catalog
        - Delete from IZ
        - Save and release records
    - Assign record to another cataloger and release assignment
    - View and compare previous versions of records and why this is useful
    - View/add/edit inventory -- *see Holdings Records, Item Records, Portfolios*
    - Relink holdings to a different bibliographic record -- *see Holdings Records*
    - Understand icons in the main pane toolbar
- Understand the limitations of the LOWER pane of the metadata editor (e.g., alerts have not typically worked well and can likely be ignored as editing of records is usually done in Connexion rather than Alma)
- Understand how changes made to bib, holdings, and item records in the metadata editor affect display in Primo (See also Other Functional Areas - Primo)

9. LOCAL FIELDS

Description: Covers how to include local information in bibliographic records in the Shared ILS that cannot appropriately be included in OCLC master records. (Further information on this topic can be found in the Alliance local fields best practices, https://www.orbiscascade.org/local-fields/, and in the Local Fields Review Group Final Report, https://www.orbiscascade.org/local-fields-review-group.)

Audience: Anyone who does original or copy cataloging in the Shared ILS.

Objectives:

- Understand the difference between local information and non-local information
- Understand the different types of local fields and the MARC tags that are used for each type
    - Alliance defined
    - Local institution defined
    - Hyperlinked and non-hyperlinked
    - Alliance-wide display vs. local display
    - Local fields that mirror the format of standard MARC vs. local fields with no structural constraints

- Understand how to enter local fields into a record
    - Via metadata editor
    - Via normalization rules
- Understand how NOT to enter local fields into a record
    - Via Connexion

    - Entering local information as “normal” MARC fields in the metadata editor
- Understand how to migrate local fields from legacy systems (only for new Alliance members)
- Understand the best practices for dealing with local information
- Understand how to change tags on existing local fields

10. RECORD IMPORTS

Description: Covers the various types of import profiles and how they are used for loading record sets into Alma, importing order records into Alma, and updating inventory. Does not include detailed information about the New Order and Update Inventory profiles, which are more related to Acquisitions.

Audience: Anyone who imports records into Alma should have a basic understanding of import profiles. ADVANCED: staff who create and edit import profiles.

Objectives:

- Understand the different types of import profiles
    - Repository
    - New order
    - Update inventory
    - Initial authority (Mention that this one exists, but explain that the Alliance is not using it.)
- Understand what is on the various tabs in an import profile
    - Profile details
        - Discuss all fields, especially:
            - Use Network Zone check box
                - Note how this cannot be changed once set
            - Originating system
            - Import protocol
            - Physical source format
            - Encoding format
            - Source format
            - Status
    - Normalization and Validation
        - Filter
        - Normalization
        - Validation exception profile
    - Match profile
        - Match profile (what each one does, and Alliance recommendations)

            - Serial match method
            - Non-serial match method

        - Match actions
            - Handling method
                - Automatic
                - Manual
            - Upon match
                - Merge
                - Overlay
                - Do not import
                - Use NZ Record
            - Merge/overlay
                - Merge methods (what each one does, and Alliance recommendations)
                - Allow bibliographic record deletion
                - Do not override/merge a non-brief record with a brief version (do not use)
                - Do not override/merge record with an older version (do not use)
                    - Disabled
                    - Consider originating system
                    - Ignore originating system
        - Automatic multi-match handling
            - Disregard invalid/cancelled system control number identifiers
            - Prefer record with the same inventory type (physical/electronic)
            - Unresolved records
                - Skip and do not import
        - No match
            - Upon no match
                - Add to NZ
                - Do not import
                - Import to IZ
    - Set management tags
        - Suppress record/s from publish/display
        - Synchronize with OCLC (Must always be set to “Don’t publish”)
        - Synchronize with Libraries Australia (Must always be set to “Don’t publish”)
    - Inventory information
        - Inventory operations
            - Electronic
            - Mixed

            - Physical
            - None
        - Ebook mapping (Only with Inventory operations “Electronic” and “Mixed”)
            - Delete/deactivate portfolios
            - Portfolio type
                - Standalone
                - Part of an electronic collection
            - Electronic collection (Only if Portfolio type = Part of an electronic collection)
            - Service (Only if Portfolio type = Part of an electronic collection)
            - Material type
            - Single portfolio - Multiple portfolios
            - Extract portfolio information from field
            - Extract access URL from subfield
            - Indicators to skip
            - Extract internal description note from subfield
            - Default internal description note
            - Extract authentication note from subfield
            - Default authentication note
            - Extract public note from subfield
            - Default public note
            - Extract Library from subfield
            - Default library
            - License
            - Activate resource
        - Physical item mapping (Only with Inventory operations “Physical” and “Mixed”)
            - Material type
            - Mapping policy
                - Basic
                - Advanced
            - Library field
                - Subfield
            - Default library
            - Default location
            - Map library/location
            - Number of items field
                - Subfield
            - Default number
            - Barcode field
                - Subfield

        - Item policy field
            - Subfield
        - Default item policy
        - Alternative call number
            - Subfield
    - Call number mapping (Only with Inventory operations “Physical” and “Mixed” on Profile type “Update inventory”)
        - Update holdings call no.
    - Inventory handling (Only with Inventory operations “Physical” and “Mixed” on Profile type “Update inventory”)
        - Receive item
- Understand how to run imports
    - Loading file
    - Monitor and view imports
        - “Manual handling required”
        - Reports
        - Dealing with multimatches and other load failures
- ADVANCED: Understand how to create and edit import profiles

11. ELECTRONIC RESOURCES

Description: This training provides a high-level view of how electronic resources are managed in Alma focusing mostly on bibliographic records. More detail on managing electronic resources (e.g., activating e-resources) is provided in the Acquisitions training outline. (*See also Portfolios, above*)

Audience: Anyone responsible for providing or maintaining electronic resource records in Alma.

Objectives:

- Understand the choices available for bibliographic records describing electronic resources in Alma (CZ records, OCLC records in NZ, vendor records)
    - Understand when a CZ record should be linked to the NZ
    - Understand how to link a CZ record to both the NZ and IZ
- Learn to identify bib records which are appropriate for electronic resources
- Learn to work with portfolios (*See also Portfolios)*
- Learn to work with electronic collections (*See also Portfolios)*
    - Learn how to create a local electronic collection
- Understand the results in Primo of activating PCI resources and when to do this in addition to or in place of MARC records in Alma

12. DATABASE MAINTENANCE FOR THE NZ

Description: Covers data quality issues related to shared bibliographic records in the NZ. Training related to database maintenance of a library's inventory (relinking, etc.) is covered elsewhere. It is important for staff to working in the NZ to understand Alliance policies and know how to recognize and resolve problems with bib records. (*See also Connexion and the Network Zone)*

Audience: Any staff who create, edit, or import bibliographic records

Objectives:

- Understand Alliance policies and procedures for:
  - Overlaying bibliographic records
  - Reporting records for deletion
- Understand methods for troubleshooting problems with bibliographic records, including View Versions, limitations of the 005 Date/time stamp, etc.
- Recognize problems that can occur with NZ records related to WorldCat and understand Alliance practices for resolving them:
  - Multi-match problems with Connexion downloads and other problems related to OCLC merges and splits
  - Duplicate OCLC records
  - ADVANCED: Understand when and how to merge two OCLC bibs
- Recognize problems that can occur with NZ records related to vendor record loads and how to resolve them
  - Matching on record with wrong inventory type due to ISBN match (YBP loads)
  - Multiple OCLC numbers in a record
- Recognize problems that can occur with NZ records related to Alma zones and functionality and how to report or resolve them
  - Behavior of local bibliographic data fields (e.g., local fields appearing inappropriately in other libraries' IZ)
  - Suppressed CKB (or other) records in the NZ preventing publishing to Primo
  - Electronic collection records lacking URLs preventing publishing to Primo (one library having published a record lacking a URL prevents display of other libraries' records in Primo)
- ADVANCED: Use indication rules and Manage Sets to identify problems

13. PHYSICAL PROCESSING: BINDING AND LABEL PRINTING

Description: Alma functionality related to binding and label printing is limited. For label printing, many libraries use external software such as SpineOMatic. This training explains the available options for processing physical materials after cataloging and provides pointers to resources for specific information.

Audience: Any staff who work with physical materials post-cataloging to print call number labels or prepare volumes for binding. Staff responsible for configuring and managing label printing (ADVANCED).

Objectives:
- Use the “Bind Items” functionality to collapse issues and edit the resulting item record as needed
- Generate and print call number labels for cataloged material
- ADVANCED: Understand the options for label printing (SpineOMatic, Alma label printing tool (BIAF), Connexion)
- ADVANCED: Understand how to configure settings in the label printing application and printer
- ADVANCED: Understand how to parse call numbers and locations to format labels for printing
- ADVANCED: Understand how to use work orders to manage the flow of materials through the physical processing stage

Resource Management infrastructure

1. CONFIGURING INDEXES

Description: This training will explain that in Alma you can configure which indexes are searched when conducting Simple and Advanced searches

Audience: Anyone who uses Alma repository searching should have a basic understanding of what is covered in the various indexes and the configuration options. ADVANCED: Staff responsible for configuring indexes (Roles: Cataloging Administrator, General Administrator)

Objectives:

Indexing options:
- Understand that you can configure
  - which indexes are available to be searched when conducting simple and advanced repository searches in Alma
  - the order in which the indexes appear for selection in dropdown lists
- Understand that you can choose to hide or display preconfigured search indexes including indexes for local MARC 9xx fields in the repository simple and advanced search interfaces
- Understand that for 9xx fields you can also change the display label that appears in the UI

- Understand that MARC fields and subfields in records are mapped to search indexes which are not configurable (You can only change which search indexes are available, not which MARC fields are indexed in which index)

Configure search indexes (ADVANCED):

- Understand how to edit search indexes

2. INTEGRATION PROFILE - OCLC CONNEXION

Description: This training will explain that records from OCLC Connexion are uploaded to the Alma server on the port designated and opened by Ex Libris for the purpose of importing records. As part of the upload process, Alma applies the import settings (normalization, validation, and merge routines) defined in the import profile. This process enables the export of records from OCLC to the production Alma Network Zone.

Audience: Anyone who exports records from OCLC using the Connexion Gateway should have a basic understanding of the necessary Connexion settings. ADVANCED: staff responsible for configuring Alma and Connexion.

Objectives:

- Understand that to import records from OCLC Connexion to Alma the following actions must have been performed:
  - Configure an OCLC Connexion import profile in Alma. Note there is only one profile configured at the Alliance level for the NZ
  - Configure OCLC Connexion
  - Export the OCLC records to Alma and ensure that they are properly imported into Alma
- Understand import settings for normalization, validation and merge routines are defined in the import profile
- Learn how to configure OCLC Connexion using Alliance NZ settings to communicate with Alma
- Learn how to export an OCLC record to Alma and verify that the record exported successfully

3. CALL NUMBER MAPPING

Description: This training will explain that Call Number mapping allows you to customize how the call numbers are mapped from bibliographic records to holdings records.

Audience: Anyone who adds or edits holdings records should have a basic understanding of call number mapping for different classification schemes. ADVANCED: staff who configure the mapping table (roles: Cataloging Administrator or General System Administrator)

Objectives:

- Understand that the Call Number Mapping table allows you to customize the way call number information maps from the bibliographic record to the holdings record
- Understand that the following methods, which map call number information from the bibliographic records to the holdings records, utilize this mapping table:
    - Save a new holdings record in the MD Editor
    - Run the Update from Bibliographic tool for a new or modified holdings record from the Tools > MARC21 Holdings menu in the MD Editor
    - Run an import profile job
    - Change Holding Information job
- ADVANCED: Understand that Alma uses the first matching row in the mapping table to map the call number for each record
- ADVANCED: Understand how a call number mapping row is added to the mapping table

<u>Other functional areas</u>

1. WORKING WITH ORDER INFORMATION AND INVENTORY

Description: This training will give an overview of information from POLs that is useful for catalogers, primarily the information in the "More Info" tab. Additionally it will show what to do with this information when it is necessary to transfer the inventory from the original bib to a different one, and how to make that transfer.

Audience: Catalogers new to Alma. Practices vary among Alliance libraries in this area. In some libraries, catalogers are assigned roles related to acquisitions tasks and in some they are not, thus it is challenging to describe what catalogers in general may see or be able to do related to POLs.

Objectives:

- Understand where to locate "More Info" tab and how to read Purchase Order (PO) and receiving notes information and Requests/Work orders
- Understand the steps to take with the order information in preparation for transferring the inventory from the original bib to a different one
- Understand how to:
    - relink inventory from the original bib to a different one OR
    - inform Acquisitions staff about the need to relink inventory
- Understand that the POL Description remains static in some cases when relinked to a different bib and will continue to reflect the original bib unless edited (e.g., title, ISBN)

- In the Acquisitions functional area: Understand where to locate “Receiving and Invoicing, Receive” and how to read the information
  - Understand the use of the “Keep in Department” checkbox (Receiving Settings)
- In the Acquisitions functional area: Understand where to locate and how to use “Post-Receiving Processing, Scan in items” to add an item to the task list, if the inventory has been transferred from the original bib (*see Fulfillment*)

2. FULFILLMENT

Description: This training will give an overview of the different components the cataloger will need to be familiar with in both the Resource Management functional area and the Acquisitions functional area in order to prepare the item for delivery to its proper destination. One objective pertains only to electronic resources.

Audience: Catalogers new to Alma

Objectives:

- Related to patron requests, understand how to:
  - check the PO line information to see if a requestor’s name is there, when necessary
  - use the Request Tab to add a requestor’s name or check to see if a requestor’s name has already been added.
  - use the Tasks feature on the dashboard to see if a request has been added.
  - use the Acquisitions Post-Receiving Processing, Scan in Items function to see if a request has been added.
- Related to item records, understand how to:
  - add or remove a temporary location
  - use Fulfillment notes to generate pop-up notices for circulation staff (number of parts to check for, etc.)
  - interpret the “Acquisitions Technical Services” process type in item record when present and when absent in terms of where the cataloged item needs to go. *(See also Work Orders)*
- Related to “Item not in place” and “In Transit” status, understand:
  - Local library practice related to use of work orders and “In Transit” status (which items require delivery with “In transit” status, which items with “Item not in place” or “Item in place” status)
  - How to locate the cataloged item in the Task feature on the dashboard and change the item record status from “Item not in place” to “In Transit”.
  - If the cataloged item is not in the Task feature, understand how to use the Scan In Item function (available under Acquisitions -- Post-Receiving

Processing or Fulfillment -- Resource Requests) to change its status from "Item not in place" to "In transit".
    - Understand how to change the status of the cataloged item from "In Transit" to "Item not in place" using the Scan In Item function.
- Related to Primo display, understand that publishing cycles for bibliographic records affect availability of print and electronic resources:
    - If there is a published bib in Primo, additions or changes to inventory will appear immediately.
    - If there is no published bib in Primo, additions or changes to inventory must wait for the publishing cycle (generally overnight).
- ADVANCED: Related to bound-withs, understand the challenges of using the Host Bibliographic Record approach for circulation notices

3. PRIMO

Description: This training will give an overview of Primo publishing and options for display of bibliographic information from Alma.

Audience: Anyone who works with metadata. Roles: Cataloger, Catalog Manager, Catalog Administrator

Objectives:
- Understand how and when data is published and loaded to Primo
    - Types of publishing
    - Timing of publishing
- Understand delivery functions in Primo and what displays in each
    - Get It: Display for Locations, Availability, Holdings (Including multiple items)
    - View It: Display for electronic resources, including portfolios also local fields in bib record, and links, eg. to finding aids
- Understand how local fields display (*See also Local Fields*)
- Understand how public notes in holdings and item records display in Primo
- Understand the Details tab and how changes to records in Alma/OCLC impact it
- Understanding source of published data
    - Institution code
    - Library code
    - Location code
    - Location display name
    - Call number and call number type
    - Availability
- Understand that normalization rules affect display and indexing of Alma data fields in Primo

- ○ Understand the constraints on what can be displayed and indexed in Primo
- ○ Understand how to submit a normalization rule change request to the Norm Rules Working Group

Working in the Administration functional area *[COPIED & MODIFIED from Acquisitions outline]*

1. ALMA ANALYTICS

Description: Alma Analytics can be a powerful tool for retrieving information about resource management activities.

Audience: Anyone who needs to gather statistics or produce reports about resource management activities.

Objectives:
- Understand when to use Manage Sets vs. Analytics
- Be able to create/edit basic reports in Analytics

2. RUNNING JOBS (ADVANCED)

Description: Sets of records (or a single record) can be updated in Alma by running jobs.

Audience: This is an advanced task that should be performed by staff with sufficient expertise to understand the impact of each job on the database. Many resource management jobs require the roles Catalog Manager or Catalog Administrator, but some jobs (such as Change Physical Items) require only Physical Inventory Operator.

Objectives:
- Understand the difference between scheduled jobs and manual jobs
- Understand the various update jobs related to resource management tasks and what can be changed or deleted
- Understand how to use Manage Sets to create sets of records
    - Understand the “Types” of jobs (Withdraw, MARC 21 Bib Normalization, Export, etc.)
    - Understand the type(s) of record needed in the set for a particular job
- Understand how to export data with a job
    - Understand that you get different data when exporting with a job than with Manage Sets *(see also Manage Sets)*
- ADVANCED: Understand how to use normalization rules to make user-defined changes to a set of records (*See also Metadata Editor -- Rules*)
    - Understand the Alliance policy limitations on making edits to bib records (OK for local data in bibs, for holdings records)
    - Find, copy/edit, or create a rule

    - Preview and test functionality of a rule
    - Understand how rules work with sets and how to apply them
    - Understand the difference between types of rules and in what cases they are used

3. USER MANAGEMENT FOR RESOURCE MANAGEMENT

Description: Alma roles and privileges determine which areas of Alma operators can access and which operations they can perform.

Audience: All staff need to understand that their roles determine what they see and do. The objectives here are intended for cataloging staff with a manager or administrator role.

Objectives:

- Understand the difference between Alma privileges, roles, and profiles
- Understand the privileges contained in each Alma Resource Management role
    - Understand that the Cataloger role allows editing of NZ bibs (and understanding of Alliance policy on editing should be required)
- Understand what Alma Acquisitions roles may be required in order to perform resource management tasks
- ADVANCED: Understand how to create an Alma profile
- ADVANCED: Understand how to edit a staff user's roles