Aleph Batch Records Update

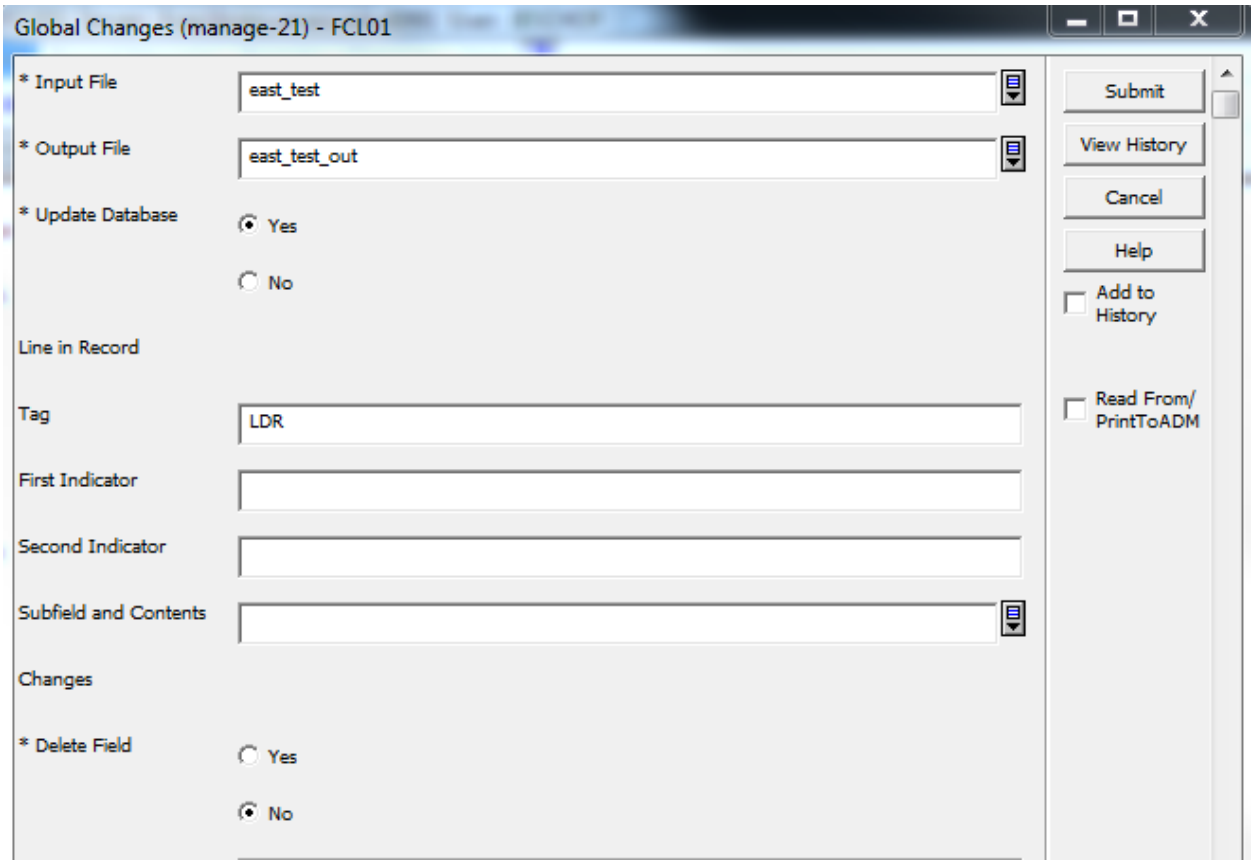
Example from EAST Retention Library

Batch Record Updates

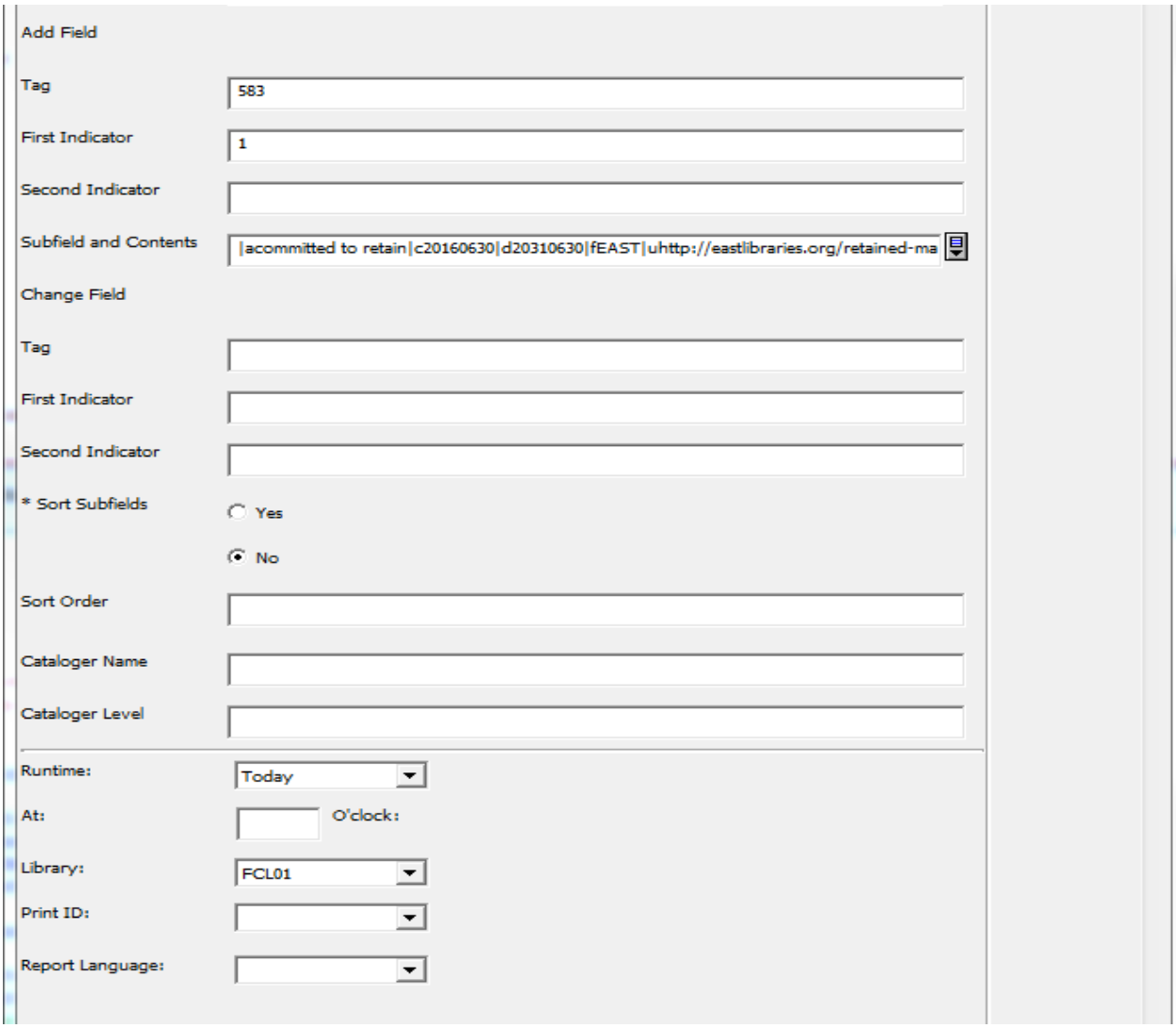
1. Create a list of retention items you want to add commitments on
2. In the new worksheet
    a. Format cells with a custom format to add leading zeros out to 9 digits
    b. Add your bibliographic library XXX01 to column B and fill down
    c. Merge Column A (Bib Record Number) with column B (XXX01)
    d. Save file as .txt file
3. Move the saved file to ALEPHE_SCRATCH on your ALEPH server /exlibris/aleph/u22_1/alephe/scratch
4. Go to the cataloging GUI and login to ALEPH
5. Go to Services > Catalog Maintenance Procedures > Global Changes (Manage-21)
6. Run the Manage-21 service to add the 583 with the following in Add field > Subfields and Content:

$$acommitted to retain$$c20160630$$d20310630$$fEAST$$uhttp://eastlibraries.org/retained-materials$$5(Your MARC Inst. Code)MA$$z (Public Note)

Top part of dialog box:



Bottom part of dialog box:



7. Make sure to double check you edit_doc_999.eng in order to configure the OPAC display to display whichever subfields (primarily the $$z and $$u) you would like to display to the public.
8. This could also be run in the XXX60 library if you wanted to add the 583 to the MARC Holdings record.

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Single Record Updates

The 583 can be added to either bibliographic or holdings records.

Example from Univ. of Wisconsin - Madison, who participate in several shared print programs

1. Holdings field 583 (Action Note)

MARC Holdings field 583 is used to record various preservation "actions" including the decision to retain for archival purposes.

Example: 583 1_ $$a committed to retain $$c 20110815 $$d 20360815 $$f DPR project (IaAS-IaU-WU) $$2 pda $$5 WU

where

a. $$a = the action being taken
b. $$c = project start date
c. $$d = project end date
d. $$f = project name
e. $$2 = source of the term in
f. $a [pda = Preservation & digitization actions]
g. $$5 = MARC code for the institution taking the action [IaAS=Iowa State, IaU=Iowa, WU=Wisconsin (Madison)]

For titles where the retention responsibility lies with UW-Madison, we want to guard against accidental withdrawal of archival copies by also adding an 852

$$x Staff Note. Example: 852 81 ... $$x DO NOT DISCARD; MUST RETAIN AS PART OF THE IOWA/IOWA STATE AGREEMENT 8/15/11

2. Holdings field 561 (Custodial History)
For situations in which we send our volumes to fill needs in a repository elsewhere, we also add a MARC Holdings field 561 to record the specific volumes involved.

Example: 561 1_ $$3 v.56 (2005) $$a On loan to IaU

Where

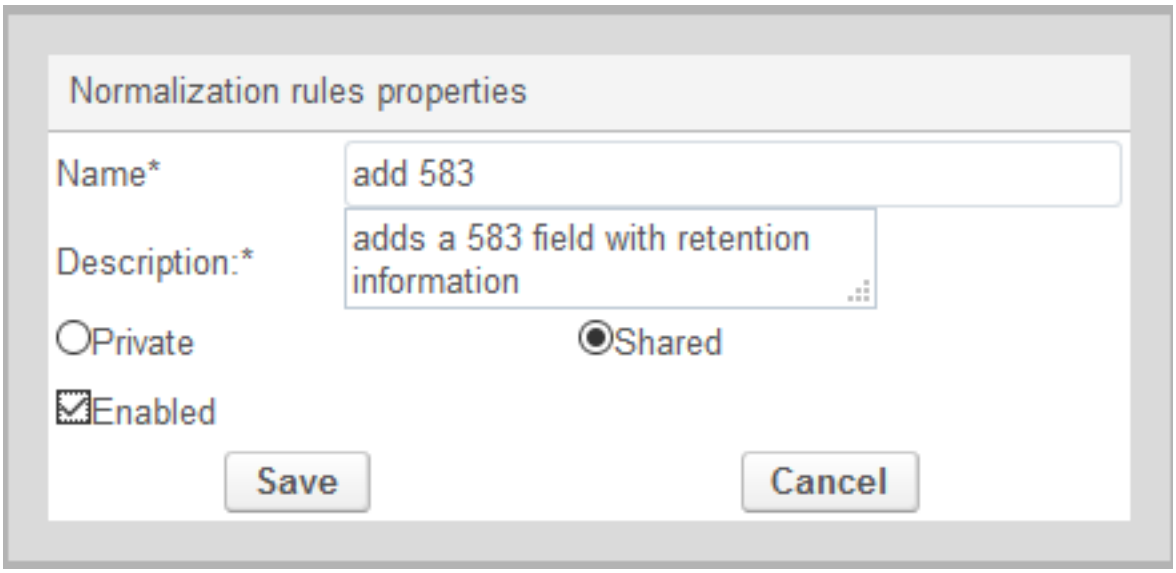
$$3 = materials specified $$a = history (free text)

Batch Record Updates
The 583 can be added to either bibliographic or holdings records.

Example from EAST Retention Library

To create a normalization rule in the Metadata Editor

1. From the File menu, select New, then Normalization rules
2. In the pop-up box that appears, fill in a name and description (both required) and check off Shared and Enabled, then click Save



3. Enter your normalization rule in the space provided. The rule below can be copied and pasted in, but you may need to make adjustments if there are existing 583 fields in your records – this rule assumes there are no existing 583 fields with the text “committed to retain” in subfield a. Change the XXXX to your MARC organization code before saving the rule.

```
rule "Add 583 for EAST"
when
TRUE
then addField "583.{1,-}.a.committed to retain"
addSubfield "583.{1,-}.c.20160630" if ( exists "583.a.committed to retain" )
addSubfield "583.{1,-}.d.20310630" if ( exists "583.a.committed to retain" )
addSubfield "583.{1,-}.f.EAST" if ( exists "583.a.committed to retain" )
addSubfield "583.{1,-}.u.http://eastlibraries.org/retained-materials" if ( exists
"583.a.committed to retain" )
addSubfield "583.{1,-}.5.XXXX" if ( exists "583.a.committed to retain" )
end
```

To add the field to Holdings records

1. Create a process to run the normalization routine

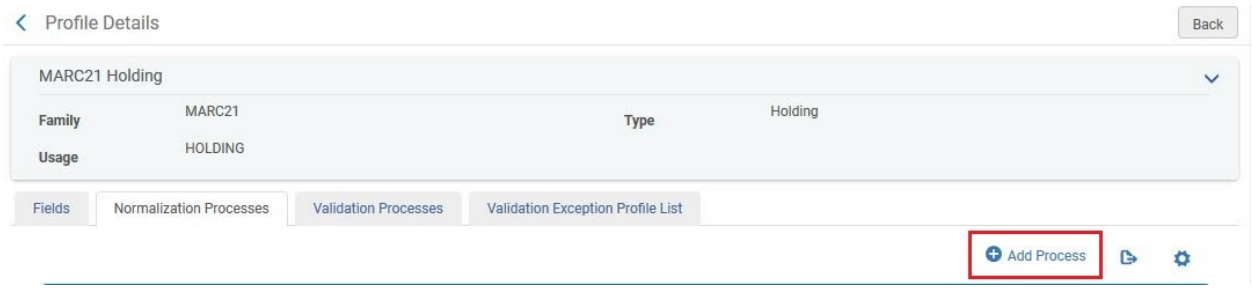
a. Click on the gear icon in the top right corner to go to the configuration settings

b.

c. Select Resources on the left side of the page, then Metadata Configuration under the Cataloging section

d. Click on Marc21 Holding to open the profile

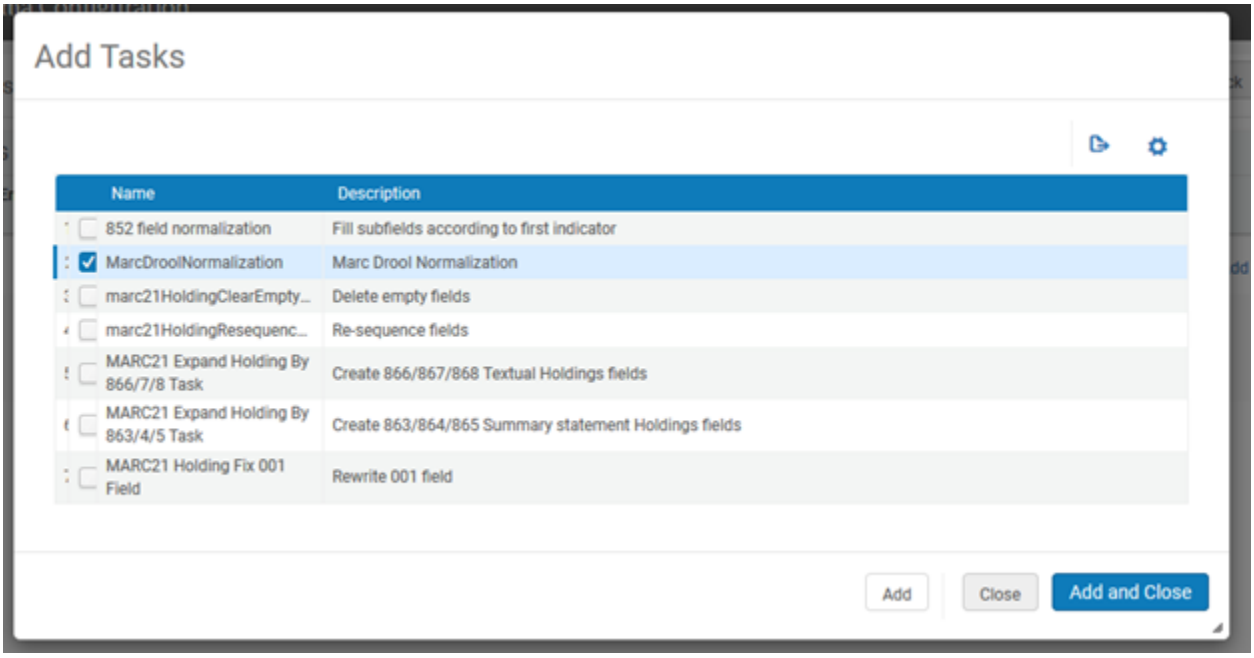
e. On the Normalization Processes tab, click on Add Process



f. Enter a name and description (both required), then click Next

g. Click on Add Tasks

h. Check off MarcDroolNormalization and click Add and Close



i. Click Next

j. Select the normalization rule you created from the drop-down list, then click Save.

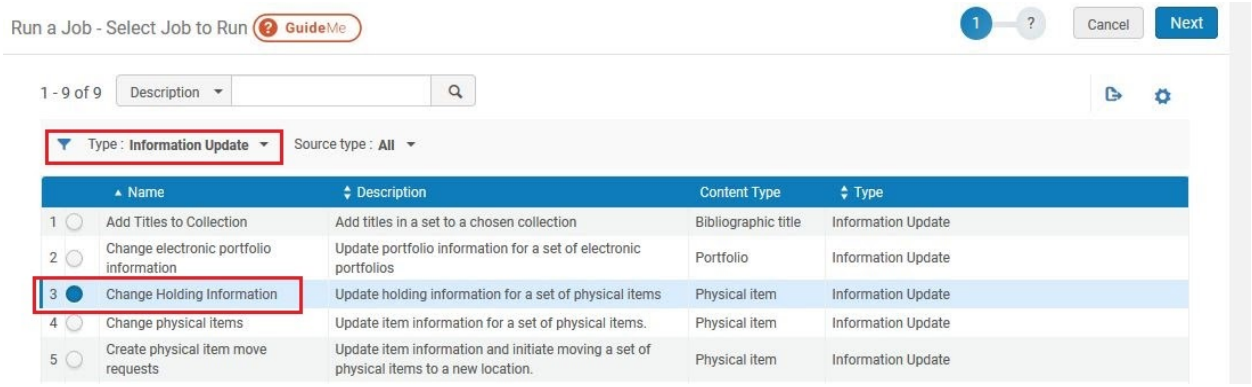
2. Run the normalization routine using the physical items set created by uploading the barcodes

a. Normalization rules should be tested thoroughly before being run on a large set

b. From the persistent menu at the top of the page, click on Admin, then Run a job

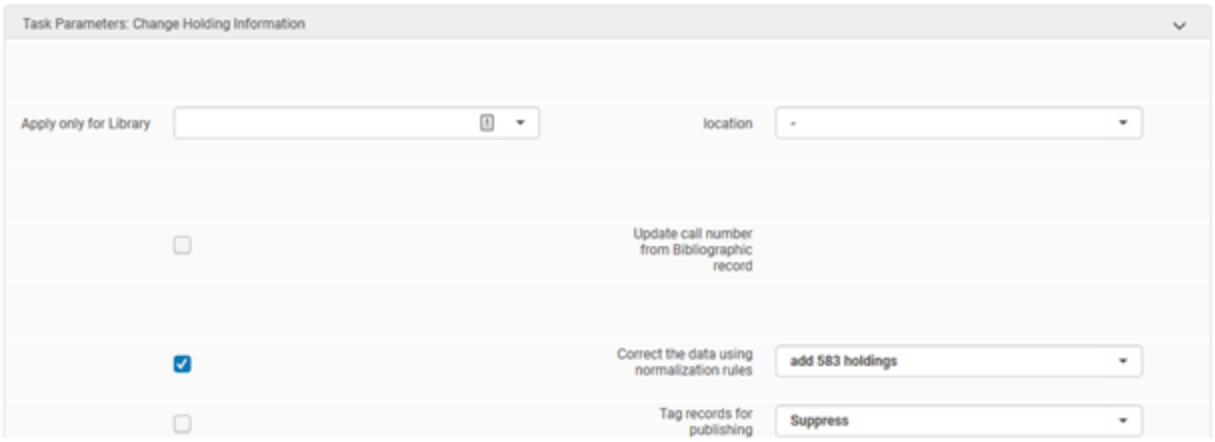
c. In the Type filter, choose Information Update, then select the Change Holding Information job and click Next

d.



e. Select the set on which to run the rule and click Next

f. Check off Correct the data using normalization rules and choose the appropriate rule from the drop-down box, then click Next



g. Review the job information for accuracy and then click “Submit”

To add the field to Bibliographic records (alternative option)

1. Create a process to run the normalization routine

a. Click on the gear icon in the top right corner to go to the configuration settings

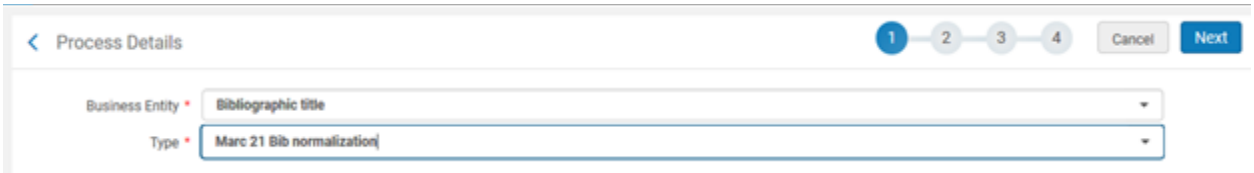
b.

c. Select Resources on the left side of the page

d. Under the “General” section, click on Processes

e. Click on Add Process

f. Select Bibliographic title for the Business Entity and Marc21 Bib normalization for the Type, then click Next



g. Enter a name and description (both required), then click Next

h. Click on Add Tasks, check off MarcDroolNormalization (near the top of the page) and click Add and Close (at the bottom of the page), then click Next

i. Choose the normalization rule you created from the drop-down list, then click Save.

2. To run the routine on bib records, you'll need a "titles" set. You can create a new "all titles" set by uploading a file of MMS IDs, or, if you uploaded barcodes to create a physical items set, you can convert that set to a Titles set.

a. From the persistent menu at the top of the page, click on Admin, then Manage sets

b. Find the desired set

c. Under the Actions button, select Create Titles Set

d. Alma will suggest a name for the new set (which can be changed); click Submit

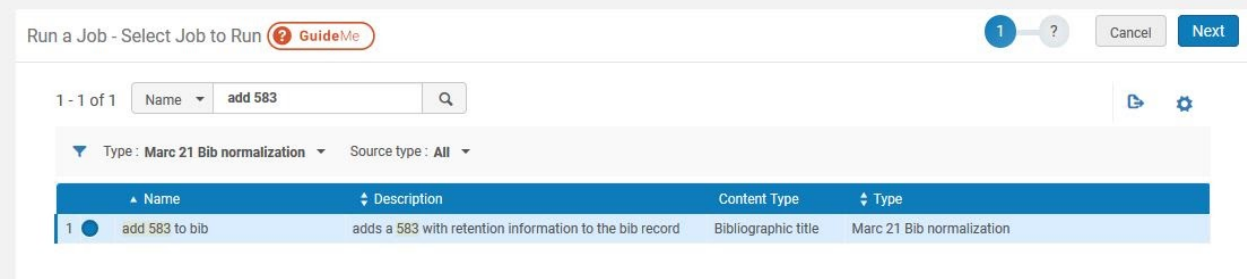
e. An 'all titles' set will be created which can be used for bibliographic changes

3. Run the normalization routine

a. Normalization rules should be tested thoroughly before being run on large sets

b. From the persistent menu at the top of the page, click on Admin, then Run a job

c. Use the Type filter to choose MARC21 Bib Normalization, then select the normalization process you created. (You can use the Find function above the Type filter to search for the process.) Click on Next.



d. Select the set on which to run the rule and click Next

e. Confirm that the correct normalization rule is selected in the drop down box, and click Next

f. Review the job information for accuracy and then click "Submit"