

## Options for adding the 583 field to records in Alma/Primo

Kathryn Doan  
Boston College  
[kathryn.doan@bc.edu](mailto:kathryn.doan@bc.edu)  
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The 583 can be added to either bibliographic or holdings records. Our general preference is to add the field to holdings records, partly because they are much more obvious to staff, and also because the 583 field is indexed in holdings records but not in bibliographic records. However, there are a couple of issues with adding the field to holdings records which may mean that adding the field to the bibliographic record is preferable for some libraries:

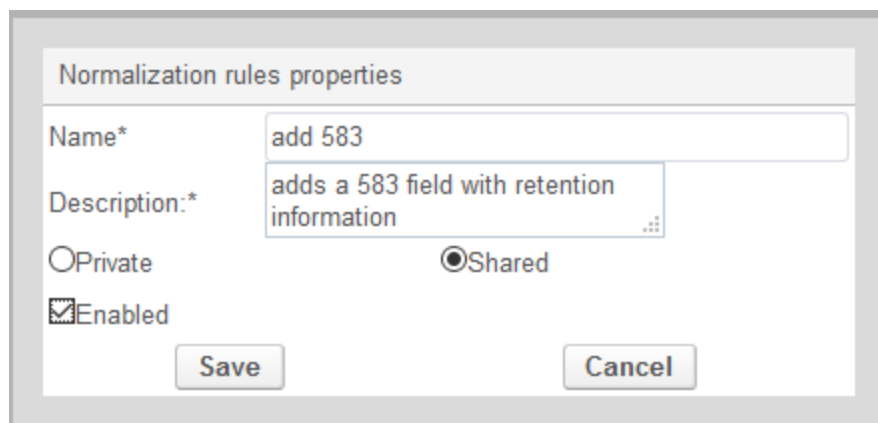
- There is a known issue with running normalization rules on holdings records in Alma at this time. We don't know whether it affects all libraries, but it does affect some. Ex Libris has stated that a fix for the issue will happen by the end of 2016. *[update: this was fixed and is no longer an issue]*
- For Primo users, the 583 will not display in Primo from the holdings records. It is possible to display it from bibliographic records.

Brandeis and Boston College have decided to add the 583 field to the holdings records, but also to add a local field to the bibliographic records to note the retention commitments and to display them publicly.

A normalization rule can be used to add the 583 field to either bibliographic or holdings records.

### 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



Normalization rules properties

Name\* add 583

Description:\* adds a 583 field with retention information

Private  Shared

Enabled

Save Cancel

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. Select Resources on the left side of the page, then Metadata Configuration under the Cataloging section
- c. Click on Marc21 Holding to open the profile
- d. On the Normalization Processes tab, click on Add Process

Profile Details Back

MARC21 Holding ▼

Family	MARC21	Type	Holding
Usage	HOLDING		

Fields   Normalization Processes   Validation Processes   Validation Exception Profile List

+ Add Process

- e. Enter a name and description (both required), then click Next
- f. Click on Add Tasks
- g. Check off MarcDroolNormalization and click Add and Close

### Add Tasks

Name	Description
<input type="checkbox"/> 852 field normalization	Fill subfields according to first indicator
<input checked="" type="checkbox"/> MarcDroolNormalization	Marc Drool Normalization
<input type="checkbox"/> marc21HoldingClearEmpty...	Delete empty fields
<input type="checkbox"/> marc21HoldingResequenc...	Re-sequence fields
<input type="checkbox"/> MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
<input type="checkbox"/> MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
<input type="checkbox"/> MARC21 Holding Fix 001 Field	Rewrite 001 field

Add   Close   Add and Close

- h. Click Next
  - i. 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 the Admin menu, then Run a job
    - c. In the Type filter, choose Information Update, then select the Change Holding Information job and click Next

Run a Job - Select Job to Run GuideMe 1 ? Cancel Next

1 - 9 of 9 Description

Type: Information Update Source type: All

	Name	Description	Content Type	Type
1	Add Titles to Collection	Add titles in a set to a chosen collection	Bibliographic title	Information Update
2	Change electronic portfolio information	Update portfolio information for a set of electronic portfolios	Portfolio	Information Update
3	<span style="border: 1px solid red; padding: 2px;">Change Holding Information</span>	Update holding information for a set of physical items	Physical item	Information Update
4	Change physical items	Update item information for a set of physical items.	Physical item	Information Update
5	Create physical item move requests	Update item information and initiate moving a set of physical items to a new location.	Physical item	Information Update

- d. Select the set on which to run the rule and click Next
- e. Check off Correct the data using normalization rules and choose the appropriate rule from the drop-down box, then click Next

Task Parameters: Change Holding Information

Apply only for Library  location

Update call number from Bibliographic record

Correct the data using normalization rules

Tag records for publishing

- f. 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. Select Resources on the left side of the page
- c. Under the "General" section, click on Processes
- d. Click on Add Process

- e. Select Bibliographic title for the Business Entity and Marc21 Bib normalization for the Type

Process Details

Business Entity \* Bibliographic title

Type \* Marc 21 Bib normalization

- f. Enter a name and description (both required), then click Next
  - g. 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
  - h. 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 the Admin menu, 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.

Run a Job - Select Job to Run

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Name add 583

Type: Marc 21 Bib normalization Source type: All

Name	Description	Content Type	Type
1 add 583 to bib	adds a 583 with retention information to the bib record	Bibliographic title	Marc 21 Bib normalization

- 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"