

# Making Local Notes Easy: Setting up Controlled Vocabulary to Fill Your Local Fields



Angela M. Rhodes, SUNY Morrisville  
SUNYLA 2020 Annual Conference  
C5/L3 Lightning Round

# The Problem:

## IZ Notes in an NZ World

- Before Ex Libris Alma, local notes that were repetitive were added using macros in OCLC Connexion
- After Ex Libris Alma, local notes had to be added without our Connexion macros, and only at an institution (IZ) level.
  - By hand, these notes had massive potential for human error
  - The notes were time-consuming for staff to hand-write

# The Solution:

Close-to-a-Macro-ish Controlled  
Vocabulary with Metadata  
Configuration Field Mapping

- I did research on Ex Libris Alma's abilities to create macros for the Metadata Editor, and came up empty-handed.
- What I did find was the ability to map pre-made phrases to certain field/subfields using Controlled Vocabulary and some Metadata Configuration.

# Alma Configuration User Roles

No-Touchy without the Creds

- Catalog Administrator
- General System Administrator
- Configure at Institution Level

# The Configuration:

## Creating Controlled Vocabulary

1. Alma Configuration →  
Resources → Cataloging →  
Controlled Vocabulary Registry
2. Add CV
3. Fill in Details of the CV
  - a. Name: Marc Field and Subfield
  - b. Description: Same
  - c. Add New values
    - i. Code: What will appear in the drop-down, filling the field
    - ii. Description: Mouse-over information about the field in the drop-down

# The Configuration:

Mapping CV to Fields Using  
Metadata Configuration

1. Alma Configuration →  
Resources → Cataloging →  
Metadata Configuration →  
MARC21 Bibliographic OR  
Holding → Fields Tab
2. Field, “Customize” from the  
ellipses
3. Subfield, and “Edit Controlled  
Vocabulary” from the ellipses
4. Under “Choose Controlled  
Vocabulary” find your Controlled  
Vocabulary created earlier and  
Assign.
5. Deploy

# The Process:

## Using the Controlled Vocabulary Mapped to Fields in the Metadata Editor

1. Metadata Editor → Edit → Add Local Extension (for Local Field in IZ) OR → Add Field (for Holdings Field)
2. Type the subfield and the drop-down CV will appear
  - a. In the case of a field that is automatically part of the added field (\$\$a) you may have to back off the letter, re-type it, and the drop-down will then appear
3. Select from your CV list to apply to the field.
4. Save and Done

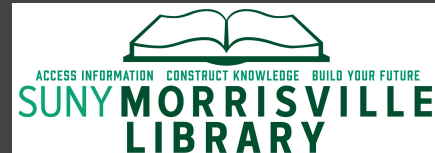
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YouTube Demo:  
[https://youtu.be/  
/Fb0YHcKzhew](https://youtu.be/Fb0YHcKzhew)





# Ex Libris Alma Knowledgebase Documents Consulted

- Configuring Cataloging (all you need for what I've done today):  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/080Configuring\\_Resource\\_Management/030Configuring\\_Cataloging](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/030Configuring_Cataloging)
- Configuring Search (if you want local fields to be indexed in Primo):  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/080Configuring\\_Resource\\_Management/020Configuring\\_Search](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/020Configuring_Search)
- Managing Display and Local Fields for Primo VE (if you want local fields viewable):  
[https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/025Display\\_Configuration/040Configuring\\_Local\\_Display\\_and\\_Search\\_Fields\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/040Configuring_Local_Display_and_Search_Fields_for_Primo_VE)

# Thank You!

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