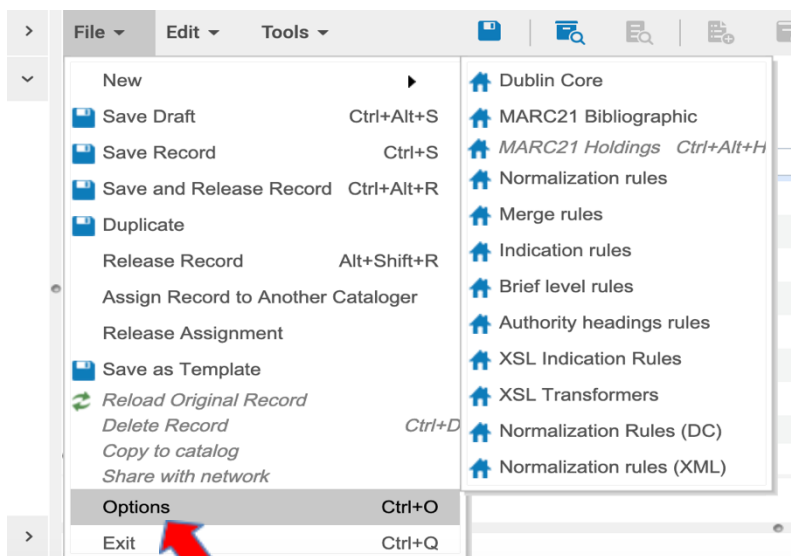


Importing record from external resources procedures

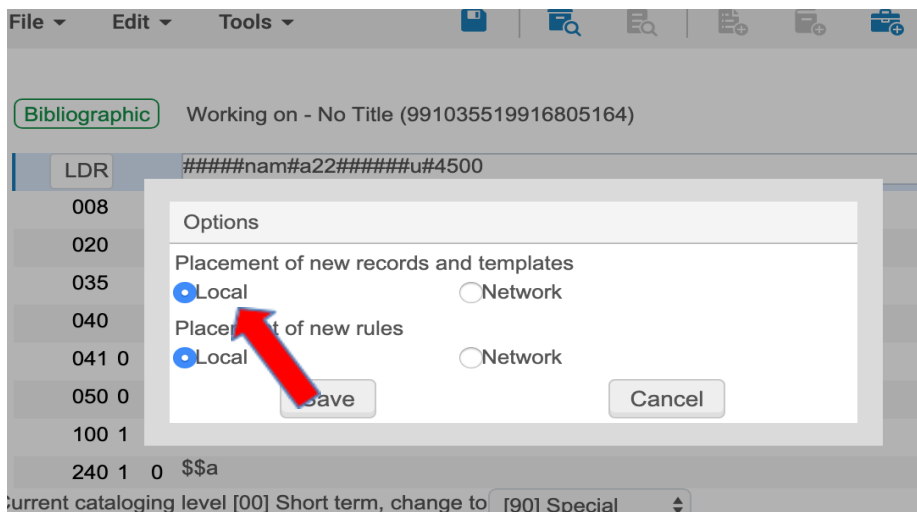
Based on YUL Cataloguing policy, new records should be imported in Institution zone first. After editing and adding items, new records can be pushed to Network zone to share with other OCUL institutions.

Before the first time to import new records, check your ALMA setting:

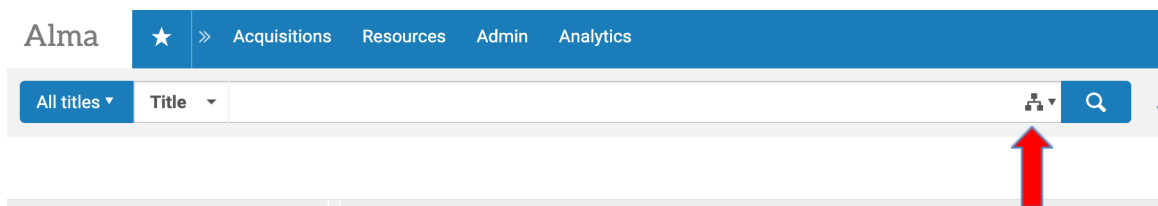
In Metadata editor, click “File --> Options”.



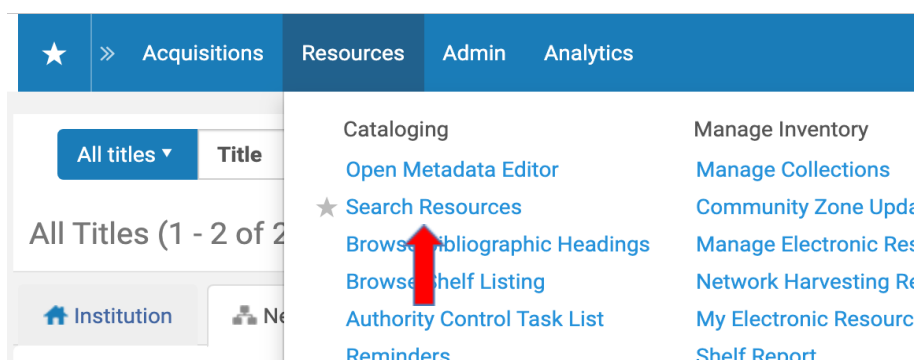
Make sure “Local” is checked and save. You just need to set up the option at the first time. The option will be saved for future use.



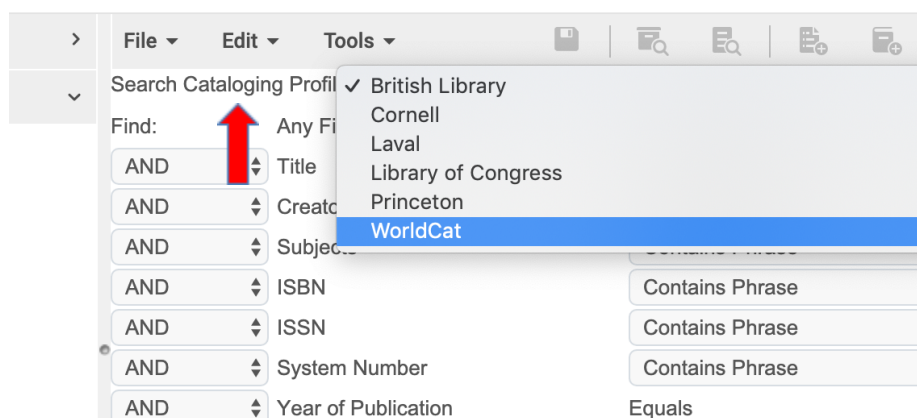
1. Using the “All Titles” search the Network Zone for the title to make sure it is not in Network zone.



2. In “Resources”, click “Search Resources”



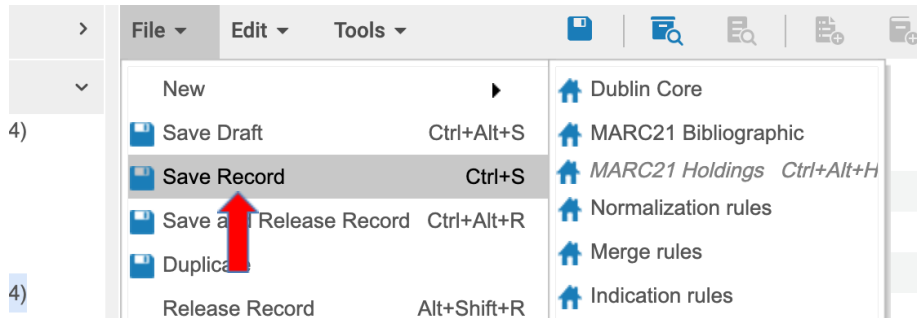
3. In “Search Cataloguing Profile”, open the drop down menu to choose the resource you would like to search.





4. Search by title, author, subjects, ISBN/ISSN, year of number, or any of the combination.

(My example: [Environment and development in Africa : participatory processes and new partnerships : papers from an international workshop held at Telemark College, Norway, August 28-30, 1995.](#))

- View the search results and choose the record matching the item in hand with most information.
- Click "Import" to bring the record into Institution zone, then edit record if needed, and click "File --> Save Record" to save it in Institution zone.

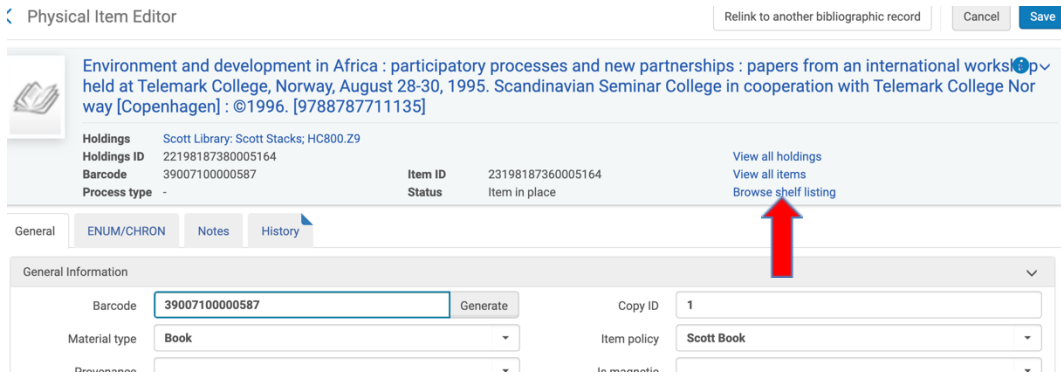


- Click "Add holding" icon () or Ctrl + Alt + H to add holding. Add the 852 field. For Example: 852 0 # \$\$b SCOTT \$\$c SCOTT \$\$h HC 800 Z9 E58 1996.

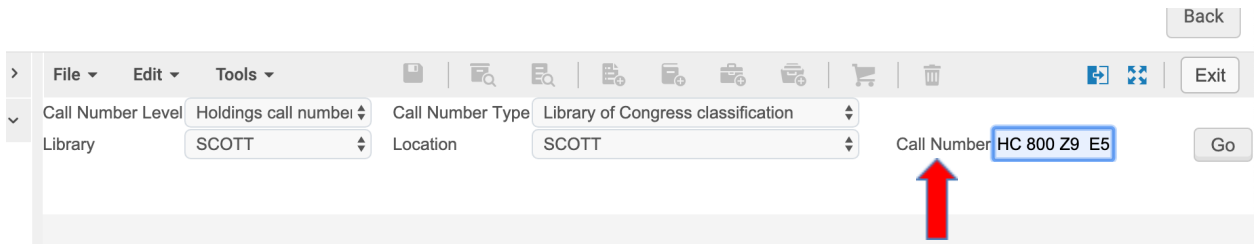
- Click "Add Item" icon () or Alt I. This will display the "Physical Item Editor". Fill in these fields:

- Barcode:** Add barcode number or auto generated barcode
- Material Type:** Click on the drop-down menu and select the appropriate value for the physical format
- Copy ID:** Type in appropriate value
- Item Policy:** Click on the drop-down menu and select the appropriate value. (Sirsi Item Types).
- Item Call Number Type:** Click on drop-down menu and select the appropriate Call number type
- Item call number:** Copy and paste call number

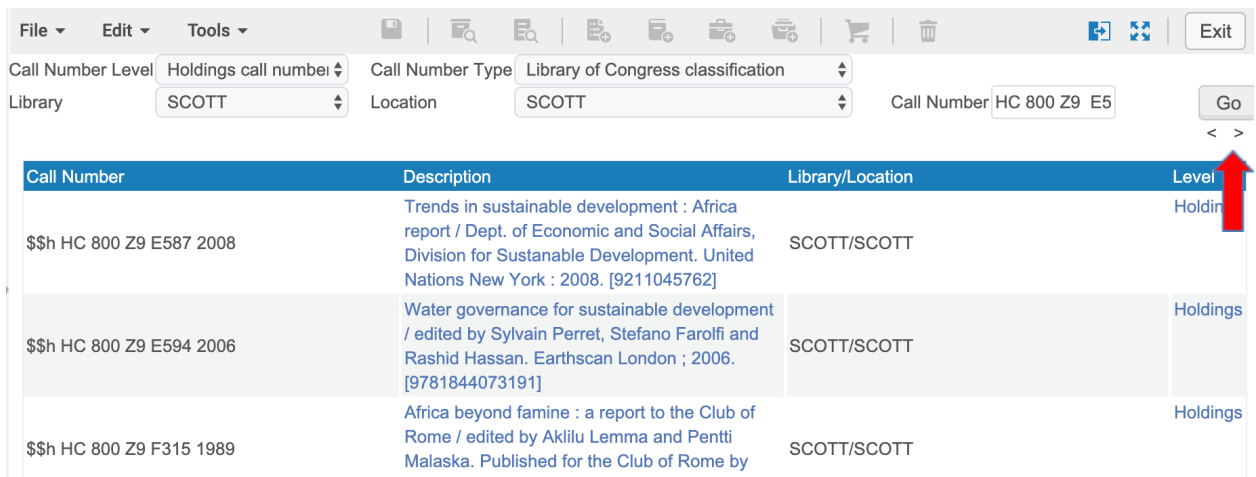
- Click "Browse shelf listing" to check shelf listing.



10. Copy and paste call number. I suggest not including pub year.




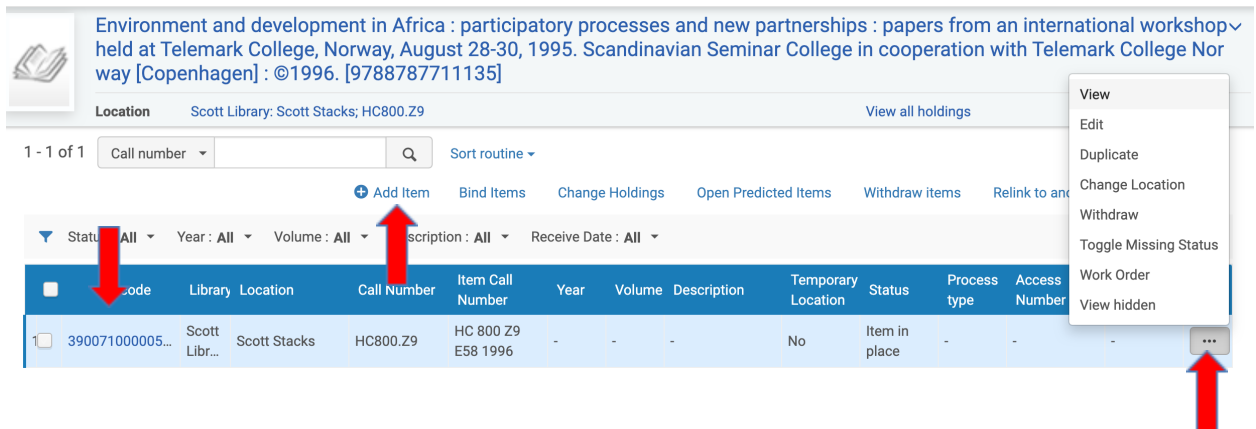
11. Use < > to browse shelf list. The new item will be shelved before the first item on this page. (The new item hasn't been listed there yet). Exit the window after done.



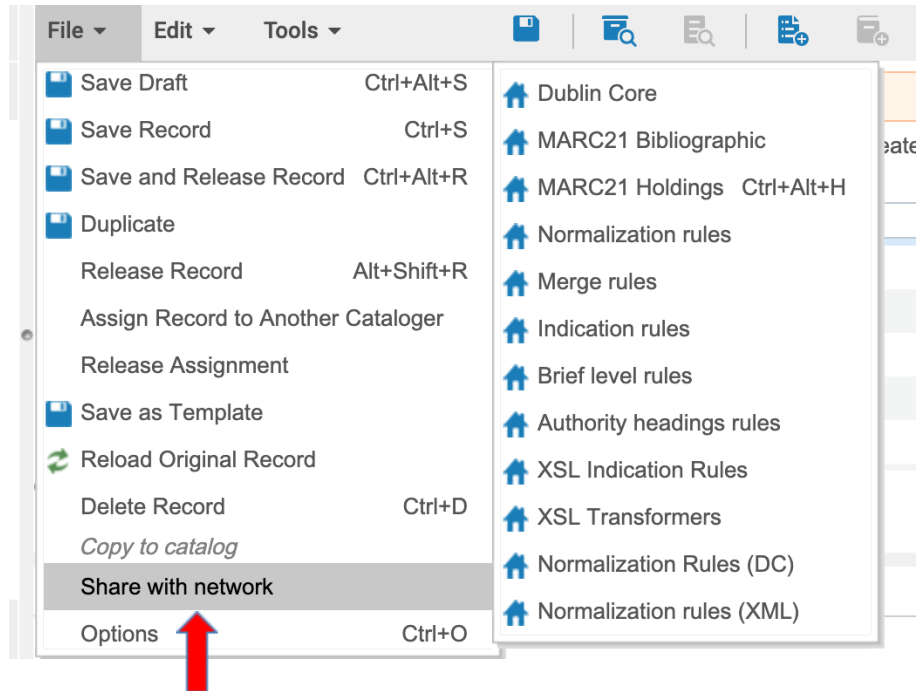
12. Click "Save" to save item record. A confirmation message appears.

13. At this stage, you can

- Click the barcode to re-open the "Physical item editor"
- Add another item.
- Click () at the left side of the item record to do other tasks.



14. Click “File -->Save Record”. Now you can search the item again to see it already in Institution zone, but not in Network zone.
15. Edit the record again. click “Share with network” to push it to Network zone.



16. Change cataloging level from [00] to [50] for regular materials, and [90] for special collection materials.



17. Save and release the record. Redo the search to see if the item is in the Network zone.

