Equipment cataloging

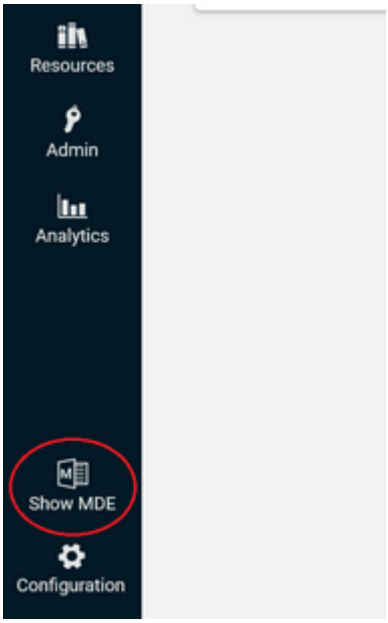
Covers creating new records and adding items, including required fields and selections for each library. Target audience is equipment managers who are unfamiliar with Alma and library functions like cataloging.

> These directions refer to an Equipment template that was created in the GT IZ for use by non-catalogers in creating new records, and also mention use of 956 (thumbnail URL) and 996 (resource type) local fields; configuration of the local fields for Primo is covered elsewhere.

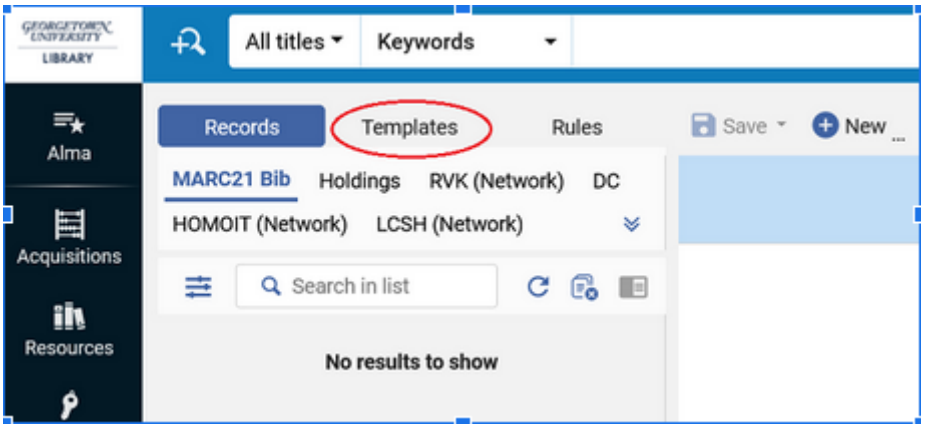
as of 18 September 2025

Creating a new record

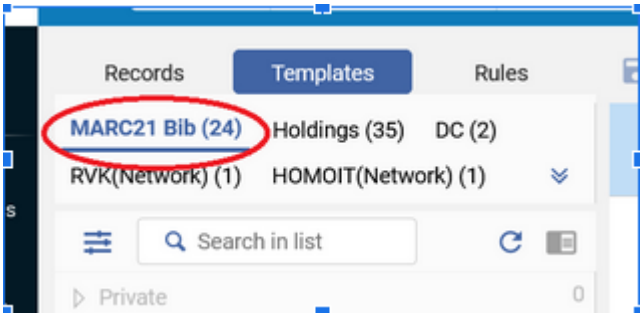
The easiest way to get into the Metadata Editor (MDE) is to click the shortcut near the bottom left corner of the Alma screen (keyboard shortcut: Alt + M):



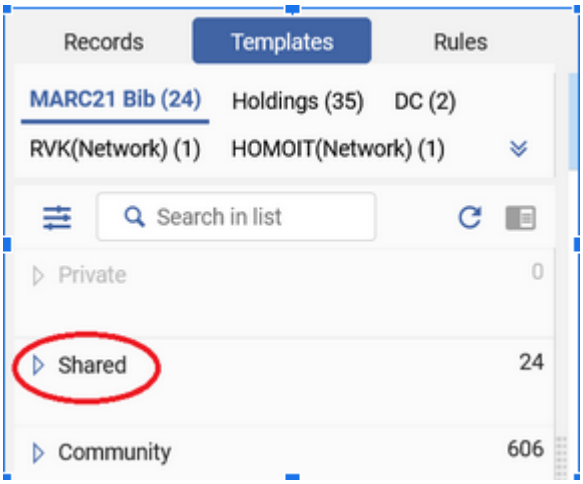
When the MDE is open, click on Templates:



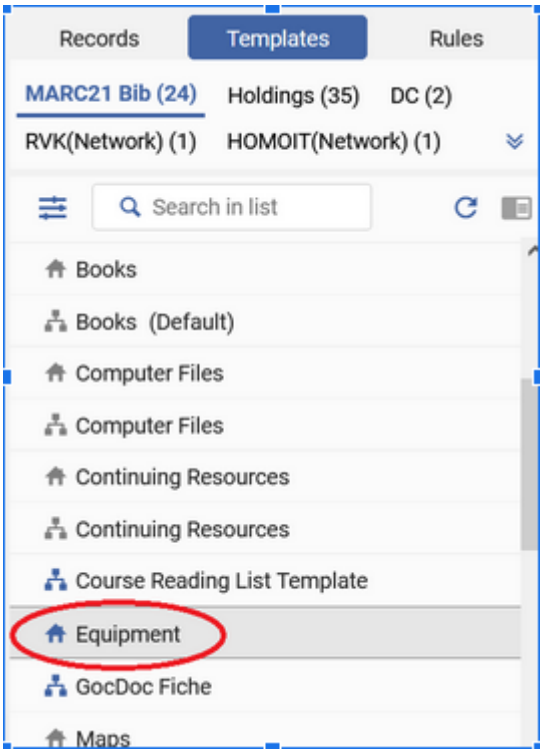
Then click on "MARC21 Bib" if it isn't selected already:



Click to open the Shared section:



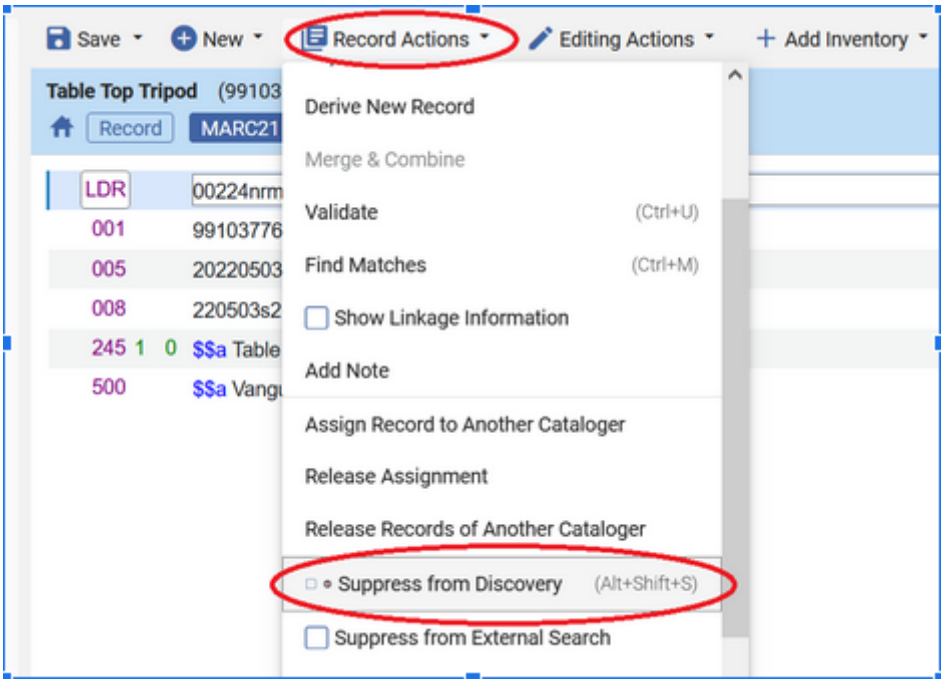
Find the "Equipment" template and click on it:



This will open a new record for you to edit. Add:

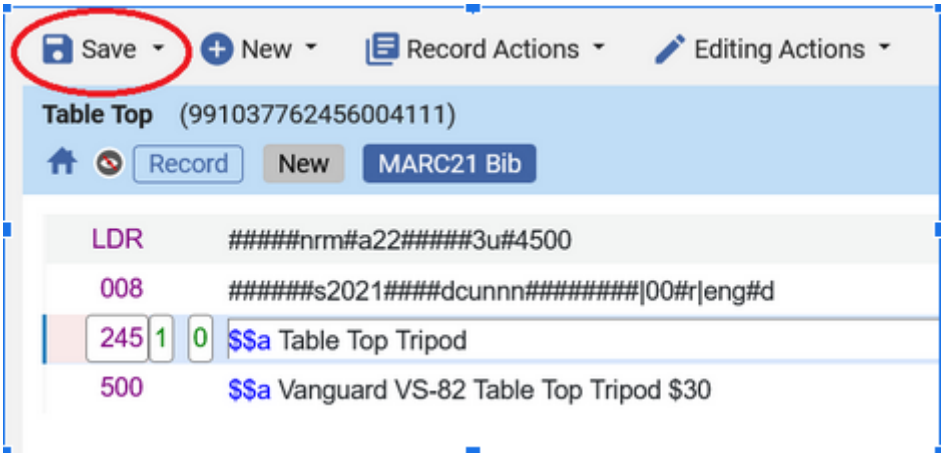
- Name of the piece of equipment (e.g. Table Top Tripod) in the 245 field
- Any notes you want to record in the 500 field (staff have used this to record the brand/model/etc. of the equipment and the cost) -->NOTE: This is visible in HoyaSearch/Primo
- If you have a thumbnail image for display, enter the URL of the image in the 956
- The 996 says "equipment" →leave this alone, it tells HoyaSearch this is equipment rather than a book

SCS ONLY: You will also need to click Record Actions and select "Suppress from Discovery" (keyboard shortcut Alt+Shift+S):

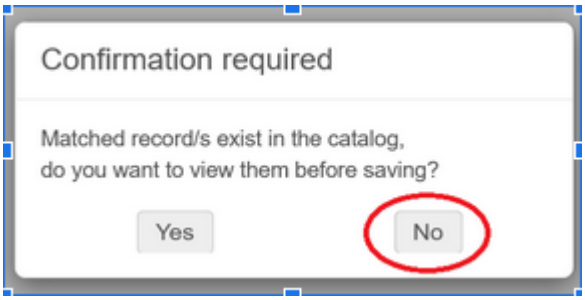


This keeps your equipment from appearing in HoyaSearch.

When you're finished, or if you need to step away from the computer without losing your work, click Save.



If a warning about matching records pops up, click No to proceed with saving your record.

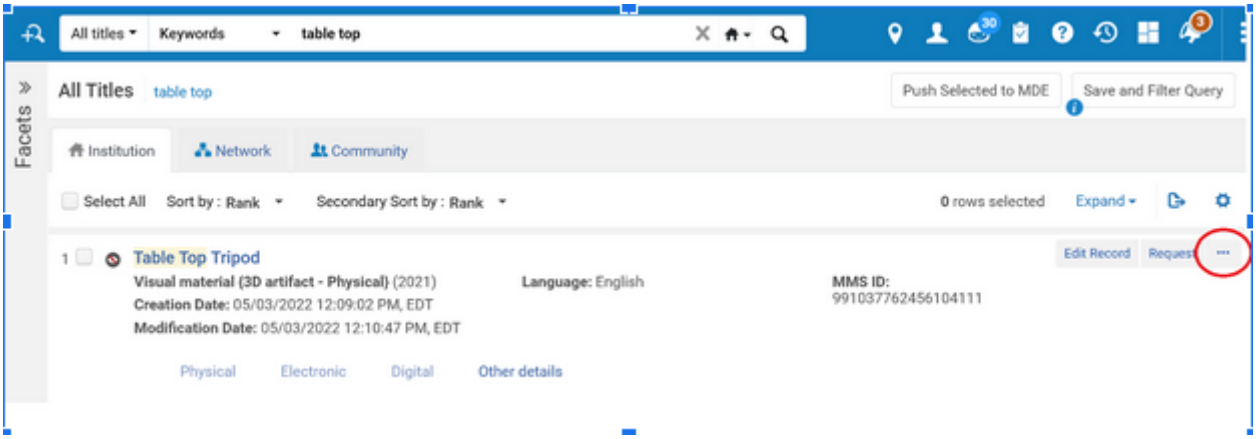


Add holdings and item(s)

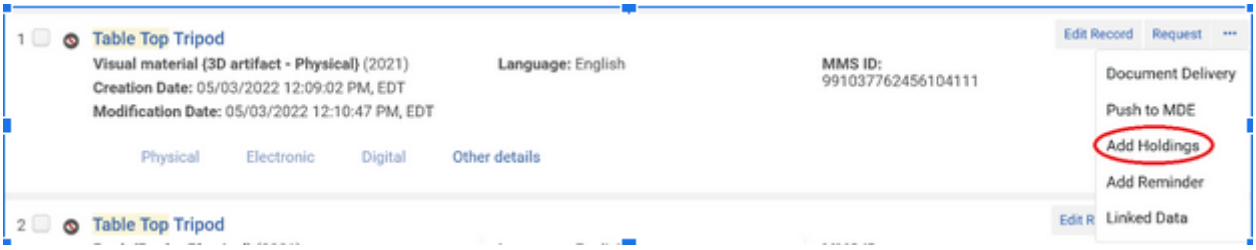
Use the Alma search bar to find the equipment record you want (make sure the left drop-down box is set to "All Titles"):



When you've found the one you need, click the three dots along the right-hand side of the display for that record:



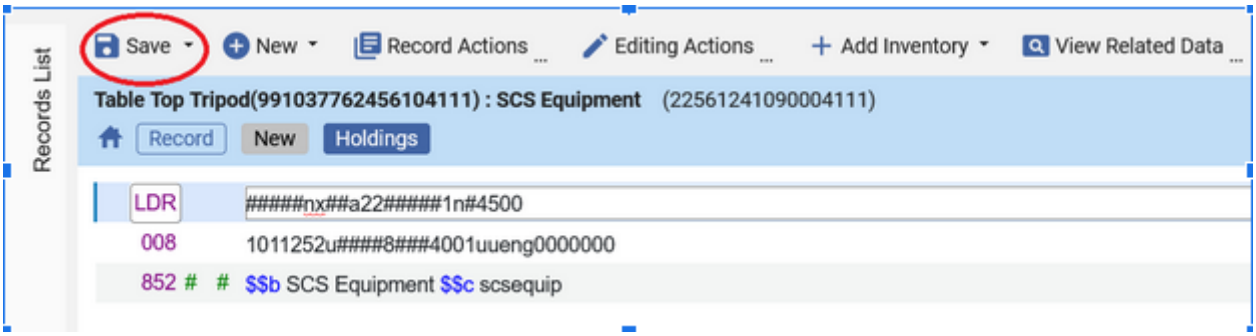
Then click "Add Holdings":



This will open the MDE with a new Holdings record. Enter the appropriate Library and location in $$b and $$c:

- Lauinger : $$b lau $$c steq
- SCS : $$b SCS Equipment $$c scsequip
- Qatar : $$b qatar $$c qequip [Innovation Lab] OR $$c qcirc [Circulation Desk]

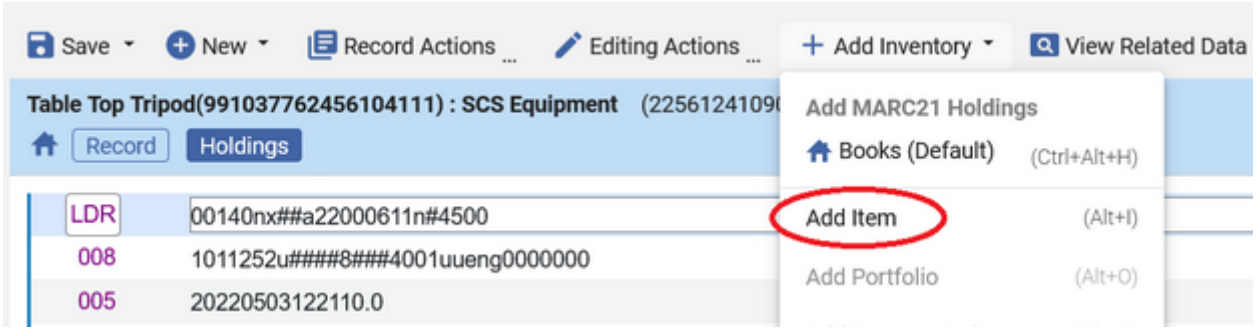
Then click Save:



Now click on "Add Inventory":



Select "Add Item":



This opens the Physical Item Editor, where you enter the barcode and other needed information.

Required item information

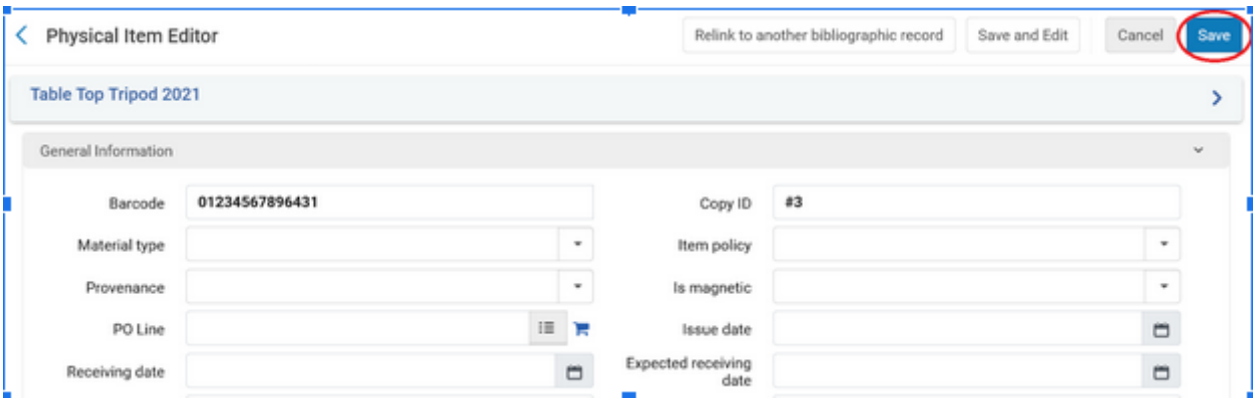
1. Barcode
2. Item Policy and Material Type combinations in use for checkout policy purposes:
    1. Lauinger & Capitol Campus
        1. Material Type = Equipment
        2. Item Policy
            1. Equipment (for bookable items), OR
            2. 3-Day Reserve (for non-bookable items that loan for 3 days), OR 2-Hour Reserve, No Overnight (for power banks) OR 4-Hour Reserve, Overnight (for other non-bookable items like chargers)
    2. SCS *(optional)*
        1. Material Type = Equipment
        2. Item Policy = Equipment

    3. Qatar
        1. Material Type
            1. Equipment (for non-ereader materials), OR
            2. E-reader (for Kindles and their accessories)
        2. Item Policy = Equipment
3. Description
    1. Lauinger & Capitol Campus : THIS FIELD MUST REMAIN BLANK
    2. This field can be used or left blank, as desired, for SCS and Qatar
4. Replacement Cost
    1. Required if you want patrons to be charged the full cost of an item if they lose/fail to return it
    2. Otherwise, they're charged the flat amount (often $110 or $200) for lost items.

Optional item information

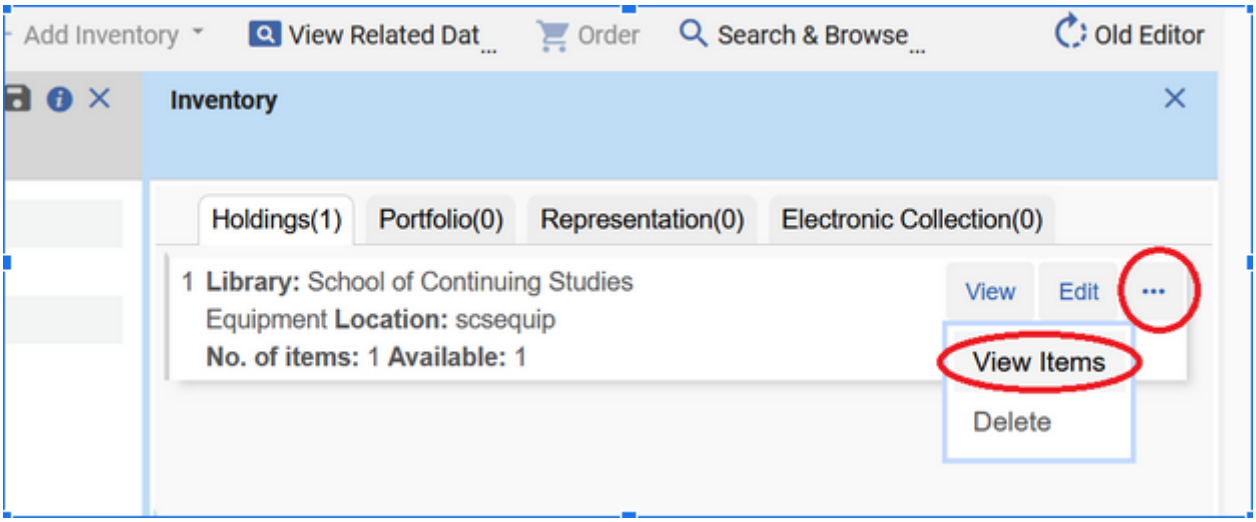
1. Copy ID : this may be useful if you have multiple items of one type (e.g. tripods).
2. Pieces : For equipment kits involving multiple parts, you can use the Pieces field to record the number of pieces included in the kit. This does not affect anything related to circulation, but can be helpful for recordkeeping.
3. Item Call Number : this can be used in place of, or in addition to, the Copy ID field to distinguish between similar items.

Click Save.

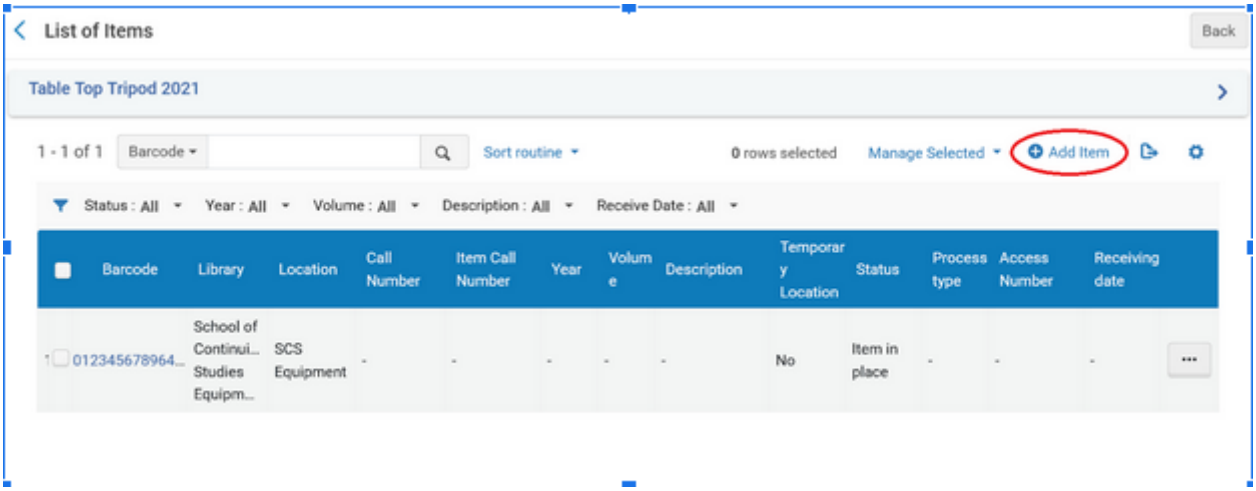


You'll be taken back to an MDE inventory screen.

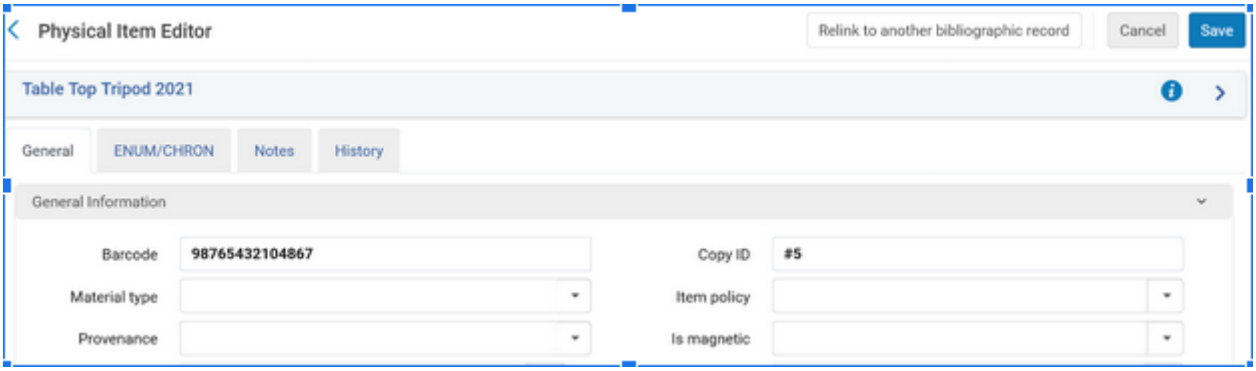
If you need to add more items (i.e., you have more than one tripod to circulate), click on the three dots and select View Items:



You'll be taken to the List of Items screen where you can click "Add Item" to add another item:



This will take you to the Physical Item Editor where you can enter the second item's information:



Clicking Save will take you back to the List of Items.

> Repeat for each additional item until all are entered into Alma.

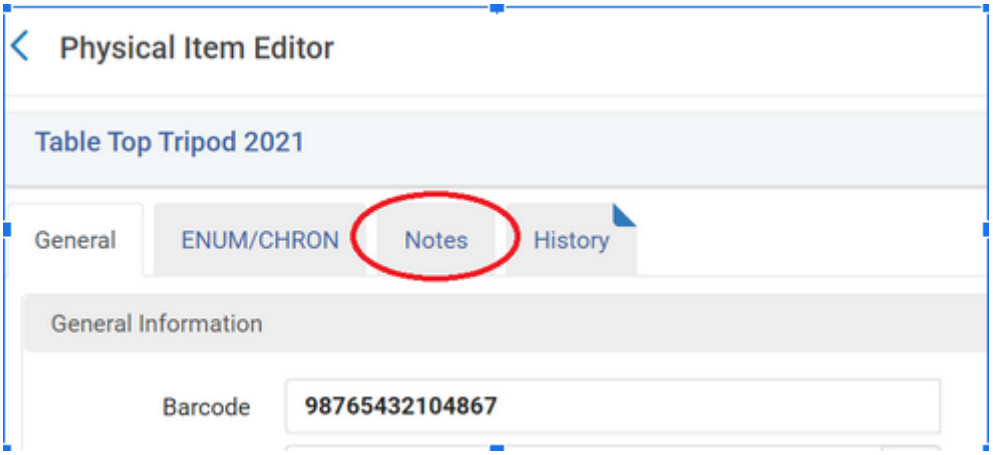
Item Notes

If there is information specific to one particular item, you can use the item notes to record that information. The maximum length for most item notes is 4000 characters.

If you're adding notes while creating an item, the item must be saved before the Notes tab is available and a note can be added. You can click the **Save and Edit** button to save the barcode, etc., and have the Notes tab appear.



Or, if adding a note later, open an item in the Physical Items Editor and you'll see the Notes tab.



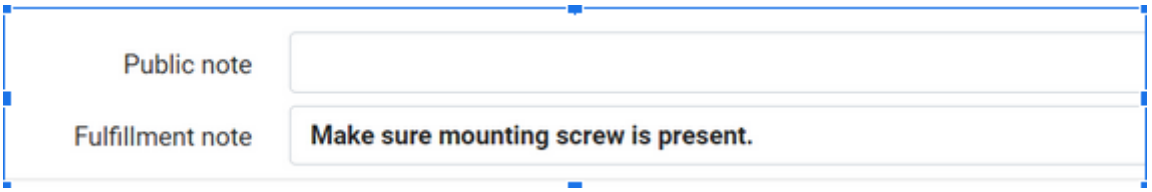
There are several types of notes available: Functional, Internal, and Statistics.

> Do not use the Statistics Notes fields; there are specific ways those are used by Lauinger and WRLC.

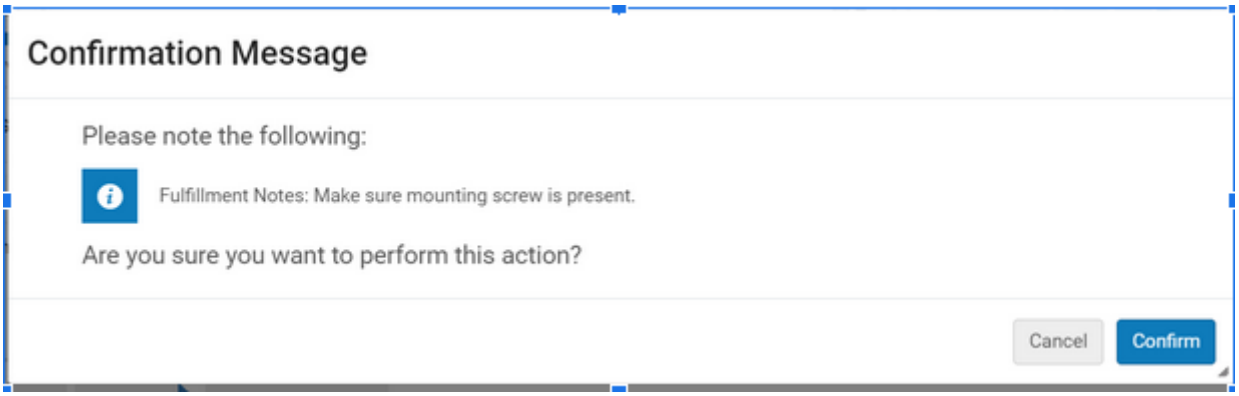


The most relevant for equipment circulation purposes is the Fulfillment note. Anything in this field will pop up when the barcode is checked in or out, so it can be a helpful place to indicate what parts should be present and/or missing pieces.

For example: This is a Fulfillment note to check for a particular piece.



That note will look like this when you're checking out the tripod to a patron:



The choice to use fulfillment notes and what to put in them is 100% up to you.

You can use the Internal note fields for information you want to record but that you don't want/need to pop up during circulation.

Revision #2
Created 2026-05-13 15:18:10 UTC by Cindy Bowen

Updated 2026-09-18 14:51:07 UTC by Cindy Bowen