

## Management Tags (Best Practice)

*Recommendations regarding the use of management tags in import profiles that can be used to suppress bibliographic records from display in Primo VE and to synchronize holdings with OCLC.*

### Background

When importing records into the NZ, management tags can be used to suppress bibliographic records from display in Primo VE and to synchronize holdings with OCLC.

It is recommended that NZ import profiles not suppress NZ bibliographic records from Primo VE. The Orbis Cascade Alliance has found that [suppressing at the bibliographic level may have negative consequences on collection analysis and statistics](#).

Exlibris documentation on managing records in a Network Zone states that “[publishing to OCLC is processed at the local institution level](#) since this process is used to expose institutions' physical holdings. Each institution in a collaborative network determines how bibliographic and holdings records are published.”

Recommendations are that [OCLC holdings be updated through an automatic job established in each campus' instance of Alma](#).

### Best Practice Recommendations

Suppress record/s from publish/delivery should be unchecked.

Synchronize with OCLC should be Publish Bibliographic records.

### Procedures in Alma

Tools ▾

- 🔍 Search Resources
- 🔍 View Versions
- 🔍 View versions of original record
- Validate Ctrl+U
- Validate in Network Zone*
- Browse Shelf Listing Alt+C
- Browse Bib Headings*
- View Notes
- View Collections
- Release All Records for User
- Test external records
- MARC Bibliographic ▶
- MARC21 Holdings*
- Dublin Core*
- Set Management Tags** ▶

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- Suppress from Discovery
- Suppress from external search
- Export to WorldCat** ▶
- Force export to WorldCat
- Brief Level 01*
- Don't publish
- Publish holdings only
- Publish bib

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\$a IHY \$\$b eng \$\$e rda \$\$c IHY \$\$d TE

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