Alma Up!

The Keys to a Successful Alma Migration in a Not So Huge Library

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Laura’s Agenda

- Alma Core Values
- Definitions
- Get Organized!
- Documentation, Resources and Tools
- Technical Requirements/3rd Party Integrations
- Forms, Forms and More Forms
- Onsite Workshop
- Data Cleanup
- Lessons
Colorado School of Mines

- Engineering, applied sciences university
- CARL → Voyager → Alma
- One campus
- One library
- 20 staff
- 7000 patrons
- 600,000 Voyager bibs (pre-migration)
- 70 Voyager Library Locations (pre-migration)
- 100 Voyager Item Types (pre-migration)
Our Timeline

• Contract Signed April 2014
• Mines PM & Library Team Assigned April 2014
• Pre-Implementation April – December 2014
• ExL Project Team Assigned Dec 2014
• Kickoff Jan 6 2015
• Implementation Jan – May 2015
• Go Live June 4 2015
• Expert Optimization Nov 2015 – Feb 2016
Alma Core Values
Alma Core Values

- The LMS influences if not determines Services
- Manages services, both internal and external
- Designed from the ground up for E-Resources
- Unified metadata and services management
- Exception-based workflows; think: automation
- Close working relationship between inventory management, services, and discovery...
Define “Success”

- What defines your successful migration?
- Everything is PERFECT?
- That you’re all speaking to each other afterward?
- That you have a minimally functioning library?
- That you have loads of new services?
- That staff have new workflows?
  - New Roles?
  - New JOBS?
Define Your Scope

• It is important to clearly establish the scope of your project ahead of time
• This is your “Worry List”
• What are you migrating?
  – ILS, Discovery Platform, ERM, SFX, etc.
• The more you migrate, the more work for you!
• What other “bits” do you have to think about?
  – Don’t forget things like ILLiad, Media Scheduling, Study Room Reservations, etc.
Mines’ Scope

- ILS (Voyager; incl ACQ, C.R.), SFX migration
- Authorities
- Users, Locations, Circ Policies simplification
- External system integrations (SIS/SSO etc.)
- Already familiar with Cloud approach (mostly)
- Reserves, ILLiad, RAPID, New Books
- EDI, Worldcat, Connexion
- Primo (you start from scratch)
- PCI (you start from scratch)
Define Your Approach

- It takes time to understand new concepts
- Takes time to adjust to semantics changes
- Beware “But we did it this way in Voyager”
- Adopt a solution-oriented, pragmatic attitude
- Establish a clear Chain of Command
- In Ex Libris We Trust!
- Be inclusive of all staff
Get Organized!
Get Organized

- Get your team(s) in place*
- Start reading the implementation documentation
- Get your Resources and Tools together
- Evaluate workflows, practices, procedures…
  …and core business functions & services
- Data Cleanup starts ASAP
- Set priorities/goals/deadlines; stay focused
- Implement UStat*
Documentation, Resources and Tools
The Pre-Implementation Guides

• Getting Ready for Alma and Primo Implementation
• Technical Requirements for Alma and Primo Implementation
• Alma Integrations with External Systems
• Electronic Resource Handling in Alma Migration
The Migration Guides

• Voyager to Alma Migration Guide
• SFX to Alma Migration Guide
• Alma Migration Considerations for Consortia
• Testing Acquisitions Data Migration to Alma
• Testing Fulfillment Data Migration to Alma
• Testing Resource Management Data Migration to Alma
• Alma Health Check List
Other Resources

- Alma-L Listserv
- Online Trainings
- Limited live pre-implementation help from ExL
- Your ExL Project Team during Migration
- Salesforce, WebEx, Basecamp, etc.
- Alma Sandbox (More on this in a bit)
- Developers Network (don’t let name scare you)
- ELUNA/IGELU Presentations
Training

Discover Alma

This course provides a brief introductory glimpse of the different areas of functionality within Alma, the Ex Libris unified Resource Management System.

- Alma 100-level Classes
- Alma 200-level Classes
- Alma 300-level Classes
- Alma 400-level Classes
- Alma 500-level Classes

Alma Essentials

The Alma Essentials training (previously "Alma Core Training") is the primary way to learn how to work with Alma.

- Acquisitions
- Administration Fundamentals
- Alma and Primo Interoperability
- Fulfillment
- Navigation and Searching
"Each customer is entitled to a standard Alma sandbox environment for training and testing purposes. Upon "Go Live" and depending on your agreement with Ex Libris, this sandbox may remain standard (standard Ex Libris data and setup) or be upgraded to premium (a copy of your production data). During implementation, training sessions typically take place on your standard Alma sandbox.” (Getting Ready Guide)
Identify Your Local Tools

• How will you communicate internally?
• ID local tools to facilitate communication
  – Email
  – Shared calendars
  – MS Project
  – Skype, Google Hangout, etc.
  – Meetings (targeted and all-staff)
  – Spreadsheets. Lots and lots of spreadsheets…
Technical Requirements and 3rd Party Integrations
Appendixes

The following appendixes provide some additional information to help you prepare for your Alma and Primo implementation.

Appendix A – Fulfillment Simplification

When you prepare for your Alma and Primo implementation, it is important to develop a simplified and maintainable physical fulfillment policy. As part of your implementation, your fulfillment policy setup preferences are solicited based on the best-practice recommendations of the Ex Libris Alma and Primo project teams.

While in your current ILS system, it is likely that the biggest drivers for fulfillment policy are granular item-level tags (item status/item policy) and user group matrices. In Alma and Primo, fulfillment policy is primarily driven by physical location and user group. That is, the concept is that items are often grouped and shelved physically together in locations which circulate similarly (open stacks for regular circulation).
Technical Requirements

• Warning! This can be a stumbling block
• No denial: these requirements are for real
• Require collaboration with central I.T., others
• You are moving to Cloud/SaS and it changes everything
• Impacts include: printing, security, authentication
• Read the “Technical Requirements” manual
Third Party Integrations

- These will be a big deal
- Unification mandates lots of integrations
- Integrations will require collaborations
- You won’t have time to do it all – so prioritize
- What is critical? (Authentication, Patron Loads)
- What can wait? (Financial, ILLiad, EOD)
- Read “Alma Integrations with External Systems”
Forms, Forms and More Forms
Our Five Months

- Lots of forms! Migration/Configuration/etc FORMS!
- Weekly schedule for prerecorded online trainings and team calls/Q&A
- Access to Sandbox provided along with trainings
- Test load / production environment delivered midway-> Data testing and feedback
- Onsite configuration meeting/training after Test Load
- Primo / Alma 2nd and Final Load Testing followed by:
  - Cutover Activity
  - Go Live (Hooray!)
  - Health Checklist; Switch-To-Support; RIP Voyager
# Migration Form

<table>
<thead>
<tr>
<th>Alma Location Name</th>
<th>External Alma Location Name</th>
<th>Use in Location Mapping Table</th>
<th>Electronic Location?</th>
<th>Suppress from Externalization</th>
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<td>On order - You may place a hold re</td>
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<tr>
<td>Collection Management</td>
<td>Collection Management</td>
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<td>Colorado Room</td>
<td>Closed Storage - See Front Desk</td>
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<td>GovPubs Media Cabinet</td>
<td>U.S. Government Publications Media</td>
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<td>GovPubs GP CDROM</td>
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<td>Colorado Government Publications</td>
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<td>Latest in Browsing Room; Journals</td>
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<td>JRNLs C</td>
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<td>Journals Stacks</td>
<td>Journals Collection (Floors 1 &amp; 1M)</td>
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<td>Reading Room with a View</td>
<td>Reading Room with a View</td>
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# Configuration Form

**Please enter your policies below**

1. **Institutional Default Values**

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<tr>
<th>Column1</th>
<th>Column2</th>
<th>Column3</th>
<th>Column4</th>
<th>Column5</th>
<th>Column6</th>
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<td>Y</td>
<td>Y</td>
<td>Recallable?</td>
<td>Loan Length</td>
<td>Loan Period</td>
<td>Requested Item Length</td>
<td>Requested Item Period</td>
<td>Recall Length</td>
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2. **Institutional Policies & TOU**

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<th>Location Type</th>
<th>Patron Type</th>
<th>Circulatable?</th>
<th>Recallable?</th>
<th>Loan Length</th>
<th>Loan Period</th>
<th>Requested Item Length</th>
<th>Requested Item Period</th>
<th>Recall Length</th>
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<td>N</td>
<td>60</td>
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<td>CLOSED</td>
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<td>Days</td>
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<td>GRADSTUS</td>
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<td>N</td>
<td>0</td>
<td>Days</td>
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<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CLOSED</td>
<td>UGRADSTUS</td>
<td>N</td>
<td>N</td>
<td>0</td>
<td>Days</td>
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<tr>
<td>LIMITED</td>
<td>FACULTY</td>
<td>N</td>
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<td>Days</td>
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<td>3</td>
<td>Days</td>
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<tr>
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<td>UGRADSTUS</td>
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<td>N</td>
<td>3</td>
<td>Days</td>
<td>0</td>
<td>0</td>
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</table>
# Third Party Integration Form

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alma Function</td>
<td>Alma Component</td>
<td>Integration Name</td>
<td>Short Description</td>
<td>Required</td>
<td>Ex Libris Best Practice</td>
<td>Customer Comment</td>
<td>EXL Comments</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>External System &gt; Finance</td>
<td></td>
<td>Export Invoices For Payment</td>
<td>Alma assigns invoices that are required</td>
<td>Required</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Import Payment Confirmation</td>
<td>Alma imports payment details from an ERP</td>
<td>Required</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Fund Allocation Loader</td>
<td>Funds that exist in an ERP may not be updated</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Export Orders (PO)</td>
<td>When a PO is sent, an XML file with the order information is sent</td>
<td></td>
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</tr>
<tr>
<td>Acquisition &gt; EDI</td>
<td></td>
<td>Electronic Data Interchange (EDI)</td>
<td></td>
<td></td>
<td></td>
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<td>Electronic Data Interchange (EDI) - Patron Driven</td>
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<td>Electronic Data Interchange (EDI) - Patron Driven</td>
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<tr>
<td>Acq &gt; Vendor &gt; PDA</td>
<td></td>
<td>Acquisition (PDA)</td>
<td>Purchase orders</td>
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<tr>
<td>Import Profile</td>
<td></td>
<td>Import New Order (EOD)</td>
<td>Access is monitored by the vendor</td>
<td>Required</td>
<td></td>
<td></td>
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<td>Update Order Import (EOD)</td>
<td>Used for updating bibliographic records</td>
<td>Required</td>
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<td>WebService</td>
<td></td>
<td>Funds (WS)</td>
<td>Alma provides a set of Web services for</td>
<td>Required</td>
<td></td>
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<td>PO Lines (WS)</td>
<td>Used for loading bibliographic records</td>
<td>Required</td>
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<td></td>
</tr>
</tbody>
</table>
Onsite Workshop
Onsite Workshop

• Takes place after your test data load
• This is for you!
• You drive the agenda! You set the priorities!
• Make sure it covers what you want/need
• Have as many staff attend as possible
• But staff must be prepared!
• We paid for an extra day
• We focused on workflows and problem areas
Data Cleanup
Clean Your Data

- Keep focused on what is migration related
- Consult Implementation Guide Appendix B
- Use Alma-L
- Define your scope: ILS, SFX, PCI, ERM
- How’s your patron data?
- Got missing/lost/stolen materials?
- Find “problem” areas like OTF/CR/P2E etc.
- Vendor cleanup
- http://hdl.handle.net/11124/17090 (ELUNA 2015)
Cleanup: What we did

- Reports! Lots of Reports!
- Get rid of duplicates (barcodes/OCLC/etc)
- Bibs with mixed print/electronic holdings (P2E)
- Delete expired patrons/purge old fines
- SFX Duplicates
- Bad PO cleanup
- OTF cleanup
- Itemization (physical materials need items)
Cleanup: What We Didn’t

- Missing item records
- Enum/Chron
- Lost Books
- ACQ
- Reserves were (and still are) a mess
- We didn’t ask enough questions
Lessons
Lessons Learned

• Cloud environment adjustments
• Monthly Releases management
• Printing changes
• Test environment (Premium Sandbox)?
• Get I.T. & other central resources involved ASAP
• Need new levels of cooperation/collaboration
• Discuss and clarify Show-stoppers
• Set Day One Requirements ahead of time
Rules To Live By

• KISS
• Keep Calm And Carry On
• Beware the weeds
• Prioritize (you can’t do it all)
• No migration is perfect
• No data are perfect
• The “Could we go live tomorrow?” question
• RTFM (& understand what you read)
• Be kind and grateful
Anna’s Agenda

- Alma Glossary
- Location & Patron Types
- Workflow
- Essential List
- Documentation
- Authority Work
- Testing
- Certification
The Master’s Seminary Library

- Theological library
- Almost 450 students
- Voyager & Primo → Alma & Primo
- One campus, one library, one Circulation Desk
- 3 full time regular staff, plus student workers (at Go Live date)
- 150,000 Voyager bibliographic records
TMS Timeline

- Contract Signed September 11, 2014
- Database Clean-up started October, 2014
- Kickoff February 24, 2015
- Lost Library Director April 6, 2015
- Implementation February – July, 2015
- Go Live July 15, 2015
Glossary

Fulfillment = Circulation

Resource Management = Cataloging
### Location Types

<table>
<thead>
<tr>
<th>Location Types</th>
<th>Locations</th>
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<tr>
<td>General</td>
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<td>Auxiliary Reference</td>
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<td>Short Loan</td>
<td>Atlas</td>
</tr>
<tr>
<td></td>
<td>Rare</td>
</tr>
</tbody>
</table>
### Patron Types

| Faculty | Staff | Students | Visitors |

### User Groups
- M.Div. Student
- Th.M. Student
- Doctor of Ministry
- Th.D. Student
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<th>Patron Type</th>
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<th>Column6</th>
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<td>Month</td>
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<td>General</td>
<td>Visitors</td>
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<td>Students</td>
<td>2</td>
<td>Hours</td>
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<td>Reserves</td>
<td>Visitors</td>
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<td>Hours</td>
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<td>6</td>
<td>Month</td>
</tr>
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<td>Short Loan</td>
<td>Staff</td>
<td>1</td>
<td>Month</td>
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<td>Visitors</td>
<td>1</td>
<td>Week</td>
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</tbody>
</table>
Implementation Overview: Getting Started

Getting Started
- Organizational
- Data Preparation
- Getting Ready Kit Review

Rapid On-Boarding (Implementation Project)
- Define
  - Kickoff Meeting
  - Project Plan
  - Environments Provisioned
  - Access to Sandbox
  - Fundamentals Training
  - Provide Configuration & Migration Inputs
  - Source Systems Preparation
- Build
  - Core Team Training
  - Configuration Form Finalize
  - Configuration & Data Migration
  - Access to Production
  - Authentication & Integrations
  - Primo Integration
  - Alma Workshop
  - Functional & Data Review
  - Customer Staff Training
  - Cutover
- Deploy
  - Go-Live
  - Certification Training
  - Project Closure
  - Transition from Implementation to Support Mode

Life in Production
- Support Helpdesk & eServices
- Best Practices Sharing
- Value of Investment (VOI) Analysis
- New Releases & Roadmap

Project Management

Customer Education

Workflow

Current Workflows Review
Workflow

Alma is an inventory system.

Where is the book?

Acquisitions
- Purchase
- Barcode
- Catalog

Processing
- Scan In
- Process
- Shelve

Resource Management
- Catalog

Fulfillment
- Check Out
- Return
- Shelve
Essential List

- Import a card from OCLC
- Create a PO and Invoice so the book can be paid for
- Have a way for Oliver to let Anna know the exact record he chose for the book (Bib ID? Other identifier?)
- Edit Bib records as needed: [Heidi’s session last Monday helped with this section]
  - Add a line to the record [CHECK!]
  - Delete a line from the record [CHECK!]
  - Add a sub-delimiter when needed [CHECK!]
  - Go into the Leader for edits [CHECK! -- need to practice this one more]
- Add a MFHD [CHECK!]
- Edit MFHD as needed
- Add Item record [CHECK!]
- Edit Item record as needed [CHECK -- need to practice this one more]
- Add additional MFHD and Item record as needed
- Import a correct record from OCLC and overlay as needed
- Check out books to patrons -- streamline this!
- Check books back in when returned
- Take care of fines and fees
- Generate fines and fees letters to send to patrons with outstanding money due to the library
- Create course reserves classes
- Put records for reserves into each class as needed
- Delete records from reserves as needed

For shortly after the Go Live date:
- Bulk exports for Authority work with LTI
- Bulk imports for Authority work with LTI
Weekly Status Calls

Import a record from OCLC
Create a PO and Invoice so the book can be paid for
Have a way for Oliver to let Anna know the exact record he chose for the book
(Bib ID? Other identifier?)
Edit Bib records as needed: [Heidi’s session last Monday helped with this section]
  Add a line to the record [CHECK!]
  Delete a line from the record [CHECK!]
  Add a sub-delimiter when needed [CHECK!]
  Go into the Leader for edits [CHECK! -- need to practice this one more]
Add a MFHD [CHECK!]
Edit MFHD as needed
Add Item record [CHECK!]
**01MASTERS (Master's Seminary) Alma Project**

**Latest project updates**

- **Sep 15, 2015** Connie B. archived the project
- **Sep 10, 2015** You commented on 09 09 User Export Demo
- **Sep 10, 2015** You commented on 09 03 Overlying Bibs Recording

**Discussions**

- **Anna Lois K.**
  - **09 09 User Export Demo** - Thanks Barb. I downloaded this file and sent a copy to David and the others. I have all three files that are posted to Exl. Box in case anyone here wants to
  - **09 03 Overlying Bibs Recording** - Thanks Barb. I just downloaded this for everyone here who may want a copy of the file. Anna

- **Carolyn S.**
  - **Course Number, Course Title and Instructor Not...** - Hi Lauren, Yes you would be able to change this in the future if you want to, glad it is working better for you. Carolyn

- **Heidi B.**
  - **Overlaying in Alma** - Anna, Thanks for opening the case. I was able to recreate the error scenario and will resolve the issue. Heidi

- **Anna Lois K.**
  - **Primo Configuration Document: Anna's doc.** - Thanks so much, Carolyn, for taking the time to improve upon my document! I printed it off so I can look at it probably
Cataloging in Alma

Green = Menu
Blue = Button
Purple = Label

* Remember to click on File > Save and Release Record in Alma when you are finished with a record.
* Remember: go to Currently at: ... Circulation Desk Alma > Fulfillment > Resource Requests > Scan in Items, choose Work Order Type: Acquisitions technical services and Done: YES; Set Status To: ReadyToShelve; scan the barcodes.
Importing **ONE** record at a time:

**Import Profile in Alma for Overlaying ONE Record in Alma from Connexion:**

1. Go to **Alma > Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > KEEP Overlay ONE record Connexion file > Actions > Edit.**
2. **Profile Type:** Repository.
3. **Profile Details** tab: **Profile name:** KEEP Overlay ONE record Connexion file; **Profile description:** KEEP Overlay from Connexion file: Connexion to file to Alma; **Originating system:** Other; **Import Protocol:** Upload File/s; **Physical source format:** XML; **Source format:** MARC21 Bibliographic; **Status:** Active; **File name patterns:** blank; **Cross walk:** No; **Target format:** MARC21 Bibliographic.
4. **Normalization & Validation** tab: **Normalization:** Correct the data using: Marc21 Bib normalize on save. **Validation Exception Profile:** Handle invalid data using: MarcXML Bib import.
5. **Match Profile** tab: **Match Profile:** Serial match method: Unique OCLC Identifier Match Method; Non Serial match method: Unique OCLC Identifier Match Method. **Match Actions:** Handling method: Automatic; Upon match: Overlay; Merge/Overlay: Merge method: Overlay all fields but local; All other boxes unchecked; Do not override/merge record with an older version: Disabled. **Automatic Multi-Match Handling:** All boxes unchecked. **No Match:** Upon no match: Do Not Import.
6. **Set Management Tags** tab: **Suppress record/s from publish/delivery:** unchecked box; **Synchronize with OCLC:** Don’t publish; **Synchronize with Libraries Australia:** Don’t publish.
7. **Inventory Information** tab: **Inventory Operations:** None.
**IMPORTANT!!!** You only need to import the **OUT** file, which contains the corrected bib records from LTI. Do NOT import the LCN or LCS files!!! Use this import method also for the **CHG** file for AUP runs (normally annually in October).

**Importing from LTI:** Bib records only – OUT file (or CHG file)

1. Once you have the files back from LTI and into the appropriate file (see above), you are ready to import them into Alma. This section deals with records in the OUT file, (or CHG file) which are corrected bibliographic records that need to be overlaid.

2. **IMPORTANT:** Wait at least one minute between imports, so the files are given separate names.

3. **Import Profiles:** Go to Alma > Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles to create a new import rule, if you need a new one. You can also run your import from here.

4. **SETTINGS for LTI import OUT bib records:**
   - **Profile Type:** Repository.
   - **Profile Details tab:**
     - **Name:** LTI import OUT bib records; Originating system: Other; File patterns: <SNIP>;
     - **Import Protocol:** Upload File/s; Physical source format: Binary; Source and Target formats: MARC21 Bibliographic; Status: Active. **Normalization & Validation tab:**
     - **Normalization:** Marc21 Bib normalize on save; Validation Exception Profile: MarcXML.
     - **Bib Import:** Match Profile: Match Profile: both 001 To MMS_ID Match Method; Match Actions: Automatic; Overlay; Overlay all fields but local; No Match: Do Not Import. **Set Management Tags tab:** Do NOT check the “suppress” option; Synchronize: both Don’t publish. **Inventory Information tab:** Inventory Operations: None.

5. **Importing:** Go to Alma > Resource Management > Import > Import.

6. Go to the **LTI import OUT bib records KEEP!** file and choose **Actions > Run import**.

7. Click on the **File icon** at the end of the **File** box and choose the file you wish to import. Highlight the file and click on **Open**.
Ask, Ask, Ask!!!
### Item count by location and type

**As of March 26, 2015**

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**Total from above:** 149732

### Holdings Count by Location

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**Total from above:** 164242
A detection of the conduct and proceedings of Messrs. Annan and Henderson, members of the Associate Presbytery's whole Sitting at Oxford Meeting-House, April 18th. Anno Domini 1764, together with their Abettors: wherein is contained some
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<td>Public</td>
</tr>
<tr>
<td>Mouse, Minnie</td>
<td>Internal</td>
<td>Public</td>
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</table>
Testing

Essential List

- Import a record from OCLC
- Create a PO and Invoice so the book can be paid for
- Have a way for Oliver to let Anna know the exact record he chose for the book (Bib ID? Other identifier?)
- Edit Bib records as needed: [Heidi’s session last Monday helped with this section]
  - Add a line to the record [CHECK!]
  - Delete a line from the record [CHECK!]
  - Add a sub-delimiter when needed [CHECK!]
  - Go into the Leader for edits [CHECK! -- need to practice this one more]
- Add a MFHD [CHECK!]
- Edit MFHD as needed
- Add Item record [CHECK!]
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- Create course reserves classes
- Put records for reserves into each class as needed
- Delete records from reserves as needed

For shortly after the Go Live date:
- Bulk exports for Authority work with LTI
- Bulk imports for Authority work with LTI
Find items in libraries near you
2 billion items available here through a library

Search: extraordinary women macarthur
Search everything

WorldCat connects you to the collections and services of more than 10,000 libraries worldwide.

Twelve extraordinary women : how God
Author: John MacArthur
Summary: You'll find spiritual lessons drawn directly from some unusual and unimpressive people in this modern day account of the women whose lives astounded their contemporaries and stand in stark contrast to the prevailing standards of the times.
Rating: 0 (not yet rated)

Library
1. Masters Seminary Library
Sun Valley, CA 91352 United States
Certification

Ex Libris Alma Certified Administrator

Anna Lois Kroll

Has successfully completed all requirements to become an Ex Libris Alma Certified Administrator

20 July 2015

Ex Libris Alma Certified Administrator
Certification

Session Review

1. You can use User Registration Rules to:
   - Assess a user registration fee to Alumni
   - Using the Fines/Fees Behavior table, I new type of fine, but one that can only be assessed manually.

FALSE! The list is fixed, and new fees cannot be added.

However, the ability to manually assess or waive can be set.

2. In 4.

CALENDARS - can be configured in both places, since there are differences.

ALMA> Administration> General Configuration> Configuration> Calendar Management tab.

ADD A LIBRARY OR EDIT LIBRARY INFORMATION> Calendar Management tab.

LIBRARY> ADD A LIBRARY OR EDIT LIBRARY INFORMATION> Calendar Management tab.

1. Standard open hours 2. Events 3. Exceptions

1. Standard opening hours - don't bother scheduling standard opening hours but do schedule events and exceptions, which will override standard opening hours in libraries associated with the institution.

2. Exception - for holidays, etc., when institution is closed.

EVENT - can be used to make all books due that date.

3. Library level -

ALMA> MultiLocation Fulfillment Configuration> Configuration> Calendar Management tab.

LIBRARY> Opening hours events 1. Exceptions are inherent here.

LIBRARY> Opening hours - add, edit, remove.

Standard opening hours - add, edit, remove.

Closed early - make exception for the times closed different from standard openings.

Can do Tuesday from x date to y date.
Questions?

Laura Guy: lguym@ines.edu
Anna Lois Kroll: akroll@tms.edu

You can find many more free PowerPoint templates on the Presentation Magazine website: presentationmagazine.com