



Testing Fulfillment Data Migration to Alma



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Introduction to This Document

Purpose of This Document

This document is designed to assist you in examining the fulfillment data that has been migrated to Alma from your current system and in testing the configuration of Alma that resulted from your answers in the Configuration Form. It is also designed to provide initial familiarity with Alma functionality. The data and configuration verifications described in this guide are not intended to be thorough. Rather, they contain recommendations informed by our knowledge of Alma, experience in migration and configuration, and customer feedback. We strongly recommend that you test data and configuration according to the guidelines below. However, we encourage you to go beyond these guidelines, especially if your migration or configuration included special or unusual requests, or if you have identified particular data or configurations as being of greater importance for your institution beyond what is recommended below.

In general, the purpose of this document is to:

- Outline how to search for and review migrated data
- Point out specific fields of interest for your review
- Describe basic checks of data, configuration, and functionality

The Fulfillment Data to Review in Alma

This document covers the following elements:

- Libraries and Locations – Libraries and locations are part of the basic infrastructure in Alma. Libraries and locations were migrated from your current system according to the input you provided in your Migration and Configuration forms. During implementation, you do not have access to the configuration screens for libraries or locations. However, you do have access to view-only screens for these entities.

- Patrons – **Patrons** refers to user records that were migrated from your current system. (Technically, in Alma, **patron** refers to a user record to which the patron role has been assigned. In this document, **patron** is used in a generic sense to refer to any user record in Alma).
- Loans – Active (open) loans are included in the migration of data from your current system. Historical (closed) loans are not included in the migration.
- Hold Requests – Hold Requests are placed by or on behalf of a patron for a particular physical item. Once the request has been placed, it must be processed – for example, by retrieving the requested item from its shelf location and placing it on a hold shelf. Only requests that have been placed on a hold shelf are migrated. Requests that have not yet been processed are not migrated. (It is recommended that you try to process all patron requests before your cut-over migration freeze. You may also want to inform your patrons that requests placed in your current system close to your cut-over date might need to be placed again after go-live).
- Fines and Fees- For overdue fines for loans that have not yet been returned, you may find a discrepancy in the amount of the fine. This is a known issue related to the time delay between the extract of your data from your current system and the configuration of applicable overdue fine policies in Alma. This issue is largely resolved by the cut-over.
- Circulation Relationships – Circulation relationships determine whether a patron may pick up physical inventory owned by one library at a different library. By default, all libraries have circulation relationships with all other libraries in your institution. However, this configuration can be changed via the configuration form (or afterwards, directly in Alma).
- Course Reading – Course Reading migration, if part of your implementation, can include courses and reading lists, faculty department.

Notes:

- [The Alma interface is undergoing continuous updates. Your interface may differ slightly from the screenshots in this guide.](#)
 - [This document assumes that you have a general familiarity with Alma Fulfillment. For more information concerning Alma Fulfillment, refer to the Fulfillment section of the Alma online help.](#)
-

2

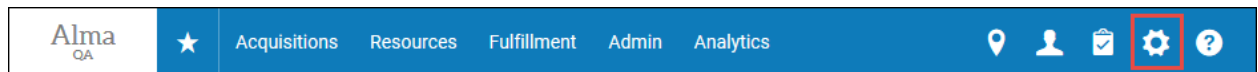
Libraries and Locations

Finding and Reviewing Libraries

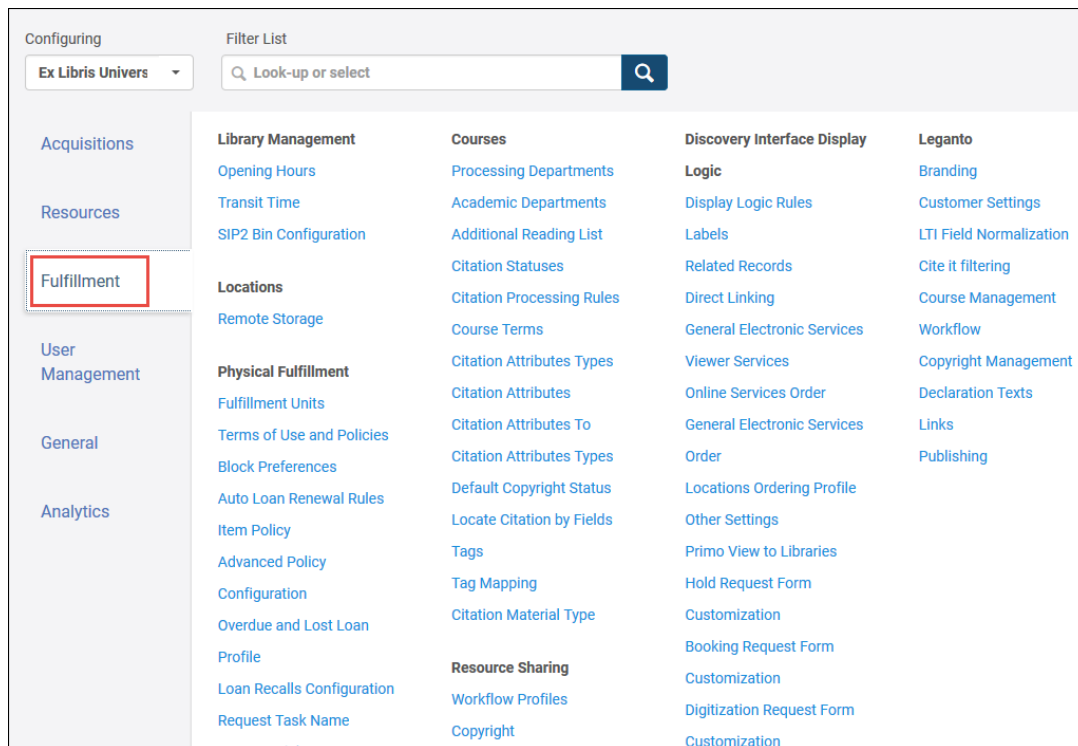
Finding Libraries

To view the list of libraries defined for your institution:

- 1 On the Alma main menu, go to the **Configuration Menu**.



- 2 Click **Fulfillment**.



- 3 On the Configuration Menu, select one of your libraries from the **Configuring** drop-down box at the top of the page. (By default, the Institution is selected). Click **Library Details**.

The screenshot shows the Configuration Menu interface. At the top, there is a 'Configuring' dropdown menu with 'Main Library' selected. To its right is a 'Filter List' search bar with the placeholder text 'Look-up or select'. Below these are five main sections: 'Fulfillment', 'Library Management', 'Physical Fulfillment', 'Digital Fulfillment', and 'General'. The 'Library Management' section is highlighted, and within it, 'Library Details' is selected. Other options in 'Library Management' include 'Opening Hours', 'Relationships', 'Circulation Desks', 'Locations', and 'Physical Locations'. The 'Physical Fulfillment' section includes 'Fulfillment Units', 'Terms of Use and Policies', 'Item Policy', 'Advanced Policy', and 'Configuration'. The 'Digital Fulfillment' section includes 'Digitization Departments', 'Resource Sharing', 'Rota Assignment Rules', 'Sending Borrowing Request', and 'Rules'. The 'General' section includes 'Printers'.

This opens the Summary tab for the selected library.

The screenshot shows the 'Organization Unit Details' page for 'Main Library'. The page has a header with a back arrow, the title 'Organization Unit Details', and 'Cancel' and 'Save' buttons. Below the header is a summary section for 'Main Library' with fields for 'Organization Unit Type' (Library), 'Path' (TRAIN_1.TRAINING_1_INST...), 'Code' (MAIN), and 'Description' (-). Below this are four tabs: 'Summary', 'Contact Information', 'Calendar Management', and 'IP Definitions'. The 'Summary' tab is selected. Under the 'Summary' tab, there is a 'General Details' section with fields for 'Organization unit name' (Main Library), 'Base Url' (-), 'Description' (empty), 'Default location for acquisition' (Stacks), 'Campus' (Main Campus), and 'Proxy' (empty). Below this are two expandable sections: 'Resource Sharing Information' and 'Item Configuration'. The 'Item Configuration' section has a checkbox labeled 'Disable Item Call Number Calculation'.

Reviewing Libraries

To review data for each individual library:

- 1 Ensure that the library **Name** and the library **Code** have been migrated or mapped correctly from the source system.
- 2 Open the **Contact Information** tab to review addresses, phone numbers, and e-mail addresses for the library.

Organization Unit Contact Information

CancelSave

Main Library

Organization Unit Type

Library

Path

TRAIN_1.TRAINING_1...

Code

MAIN

Description

-

Summary

Contact Information

Calendar Management

IP Definitions

Addresses

1 - 2 of 2

+ Add Address

⌵

Preferred	Address	Created By	Creation Date	Type	
1	1234 Main Street 2nd Floor	exl_impl	2011/12/17 12:57:38 CST	Billing, Patron Communicati... Primary, Shipping	⋮
2	✓ 123 Main Street 2nd Floor	exl_impl	2015/02/03 04:30:55 CST	Primary	⋮

Phone Numbers

1 - 1 of 1

+ Add Phone Number

⌵

Preferred	Phone Number	Created By	Creation Date	Type	
1	✓ 123-456-7890	exl_impl	2011/12/17 12:57:38 CST	Primary	⋮

Email Addresses

1 - 1 of 1

+ Add Email Address

⌵

Preferred	Email Address	Created By	Creation Date	Type	
1	✓ nosuchmail@no.such.mail.com	exl_impl	2011/12/17 12:57:38 CST	Billing, Patron communicati... Primary, Shipping, Claim response	⋮

Note: If types of addresses, phone numbers, or e-mail addresses can be distinguished in the source system, the types will be mapped to their Alma equivalents. Otherwise, all possible types will be assigned to each address, phone number, or e-mail address.

If a preferred address, phone number, or e-mail address can be distinguished in the source system, this address, phone number, or e-mail address will have a check mark in the **Preferred** column.

The word **Scrubbed** will be added to all e-mail addresses. This is to prevent inadvertent transmission of messages during testing. The word will be removed as part of the switch to production.

- 3 To view further details for an individual address, phone number, or e-mail address, click its link or select **Edit** from the row actions list. For more information about Alma persistent elements, such as the row actions list, see [The Alma User Interface](#) in the Customer Knowledge Center.

The screenshot displays the 'Addresses' section of the Alma user interface. It shows a table with two rows of address data. The first row is for a 'Billing, Patron Communicati...' address, and the second row is for a 'Primary' address. The second row is marked as 'Preferred' with a green checkmark. A red box highlights the row actions menu for the second address, which includes 'Edit', 'Delete', and 'Duplicate' options.

	Preferred ▲	Address	Created By ↕	Creation Date ↕	Type	
1		1234 Main Street 2nd Floor	ex_limpl	2011/12/17 12:57:38 CST	Billing, Patron Communicati... Primary, Shipping	...
2	✓	123 Main Street 2nd Floor	ex_limpl	2015/02/03 04:30:55 CST	Primary	...

Below the table, there is a section for 'Phone Numbers' with a single row and an 'Add Phone' button.

Calendar Management

CancelSave

Main Library

Organization

Library

Path

TRAIN_1.TRAINING_1...

Unit Type

Description

-

Code

MAIN

Summary

Contact Information

Calendar Management

IP Definitions

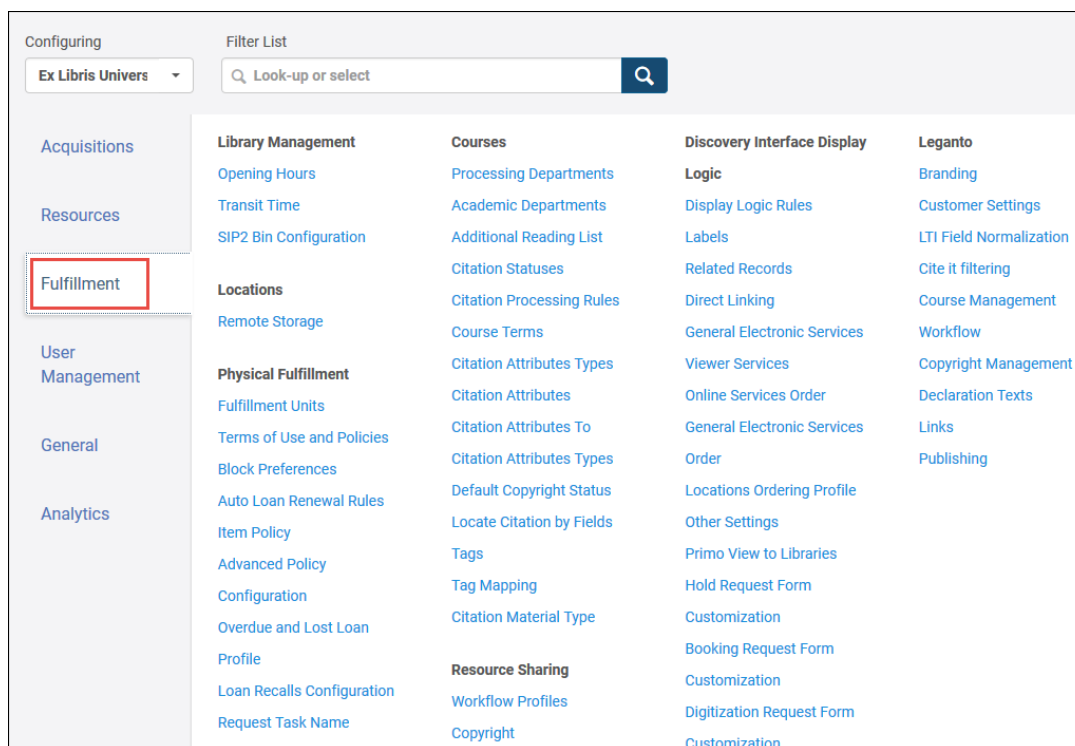
Full Calendar

Apply Changes

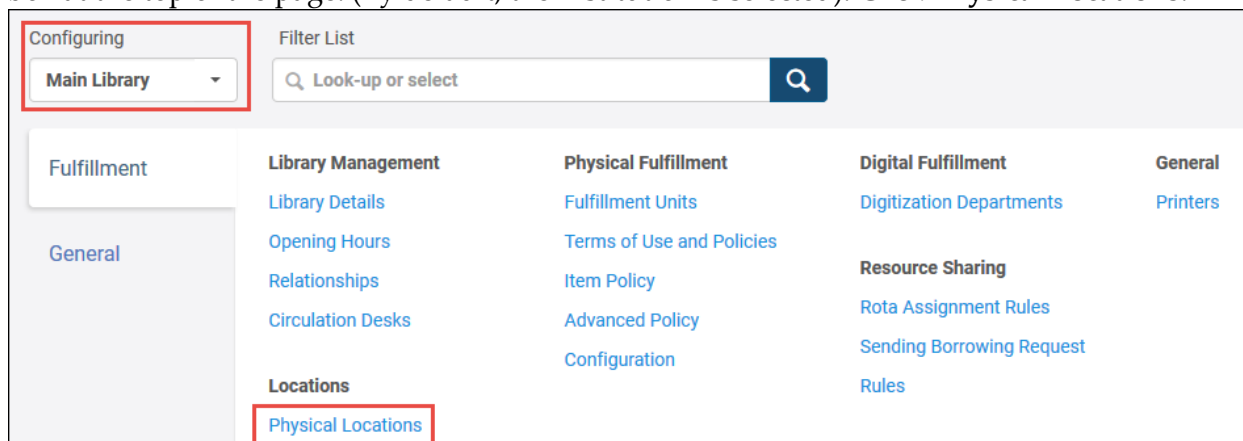
+ Add Record

	Inherit	Record type	Description	Valid from	Valid to	From hour	To hour	Recurr	Recurr Type	Day of week	Status	
1	✓	Event	End of Year	2014/06/13	-	-	-	No	-	-	Open	
2	✓	Event	End of Summer	2014/08/22	-	-	-	No	-	-	Open	
3	✓	Event	End of Term	2014/12/20	-	-	-	No	-	-	Open	
4		Standard opening hours	Open 10:00-20:00	2016/08/26	2019/08/26	10:00	20:00	Yes	-	Sund...	Open	...
5		Standard opening hours	Open 00:00-23:59	2016/08/26	2019/08/26	00:00	23:59	Yes	-	Mon...	Open	...
6		Standard opening hours	Open 00:00-23:59	2016/08/26	2019/08/26	00:00	23:59	Yes	-	Tues...	Open	...
7		Standard opening hours	Open 00:00-23:59	2016/08/26	2019/08/26	00:00	23:59	Yes	-	Wed...	Open	...
8		Standard opening hours	Open 00:00-23:59	2016/08/26	2019/08/26	00:00	23:59	Yes	-	Thur...	Open	...
9		Standard opening hours	Open 00:00-20:00	2016/08/26	2019/08/26	00:00	20:00	Yes	-	Friday	Open	...
10		Standard opening hours	Open 09:00-20:00	2016/08/26	2019/08/26	09:00	20:00	Yes	-	Satu...	Open	...

- Open the **IP Definitions** tab. Any IP addresses you entered for this library in your Configuration Form should be reflected here.



- 3 On the Configuration Menu, select one of your libraries from the **Configuring** drop-down box at the top of the page. (By default, the Institution is selected). Click **Physical Locations**.



This opens a list of physical locations for the library you selected.

Note that you can:

- Sort the list by Code, Name, or Location Type (ascending or descending in all cases).
- Search for a specific location by Code or Name using the Find box in the upper left corner of the page.

< Physical Locations List
 Back

You are configuring: Main Library [Change Organization](#)

1 - 11 of 11

Code

+ Add Location

Location Type : All Attached Fulfillment Unit : All [Clear all](#)

	Code	Name	Location Type	Fulfillment Unit	
1	offsite	Building 9	Remote Storage	General	
2	RESERVES	Course Reserves	Closed	1 hour loan	
3	govdocs	Government Documents	Open	General	
4	internat	International Collection	Open	General	
5	edu-juv	Juvenile Education Collection	Open	General	
6	MEDIA	Media Collection	Open	Media	
7	microforms	Microform Room	Open	Limited	
8	per-room	Periodicals	Open	Limited	
9	RARE	Rare Books Collection	Closed	Closed	
10	reference	Reference	Open	Limited	
11	main	Stacks	Open	General	

Reviewing Locations

- 1 Check the list of physical locations associated with each Alma library to ensure that all relevant source system entities have been migrated. Locations are a critical part of the overall Alma infrastructure.
- 2 Verify that each physical location **Code** and its corresponding **Name** has been migrated or mapped correctly.

- 3 Verify that the Fulfillment Unit is correctly assigned, according to the mapping you performed in the Locations tab of your configuration form.
- 4 Select **View** from the row actions list to display a read-only view of the physical location (see below). Verify that each location is associated with a circulation desk and receives Check In, Check Out and/or Reshelve services. For more information about Alma persistent elements, such as the row actions list, see [The Alma User Interface](#) in the Customer Knowledge Center.

← Edit Physical Location Back

You are Main Library configuring:

Physical Location Details

Location Code
offsite

Location Name
Building 9

Location Type
Remote Storage

Fulfillment Unit
General

External Location Name
Main Library Remote Storage Location

Remote Storage
Offsite Remote Storage Facility

Map
-

Physical Location Circulation Desks List

Name

	Code	Name	Description	Check In	Check Out	Reshelve
1	DEFAULT_CIRC...	Circulation	-	Yes	Yes	Yes
2	OFFSITE	Building 9	Reshelves for remote storage facility. CheckIn and CheckOut handled by Main Library Circulation.	No	No	Yes

Holdings Configurations

Accession Placement
None

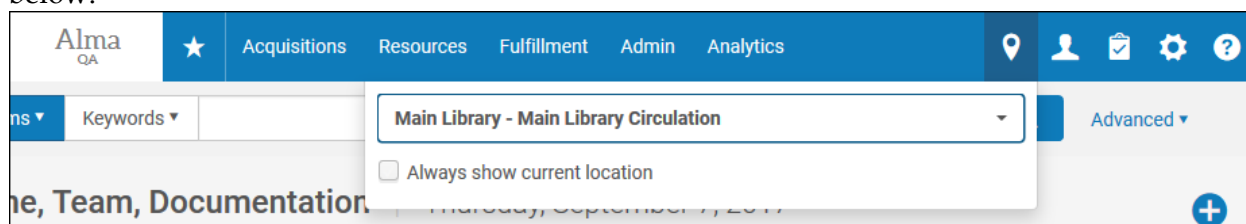
Suppress from Discovery
No

Call Number Type
Library of Congress classification

3

Patrons

Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



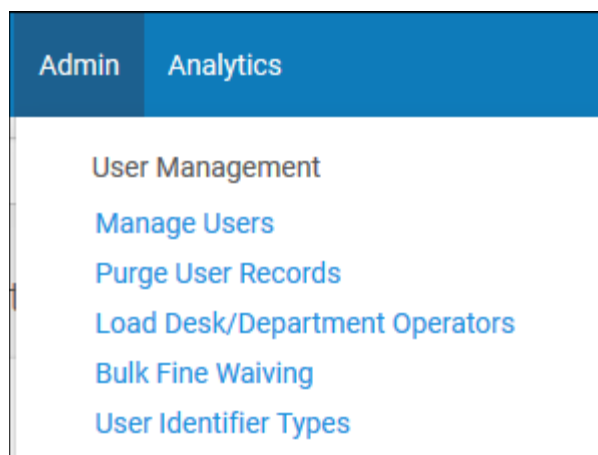
For more information on the persistent menu, see [The Alma User Interface](#) in the Customer Knowledge Center.

Finding Patrons

You can locate patron records in three ways.

- 1 From the Find and Manage Users link:

On the Alma main menu, go to **Admin** > **User Management** > **Manage Users**.



The list of patrons is displayed.

Find and Manage Users

1 - 20 of 392

Account: All Role: All Status: All

	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
1	Abutbul, Niv	Internal	Public	-	Academic Staff	Active	-		...
2	Abutbul, Noam	Internal	Staff	Fulfillment Manager	Staff	Active	-		...
3	Acquisitions, Alma	Internal	Staff	Acquisitions Manager	Staff	Active	-		...
4	Administrator, Alma	Internal	Staff	General Administrator	Staff	Active	-		...
5	Administrator, Leganto	Internal	Staff	-	Staff	Active	-		...
6	Administrator, User	Internal	Staff	-	Staff	Active	-		...
7	Allen, Norene	Internal	Public	-	Faculty	Active	2021/05/31 08:22:20 CDT		...
8	Alma, AlmaUser1	Internal	Staff	-	Staff	Active	2017/05/10 23:59:59 CDT		...
9	Altenburg, Hans-Henning	Internal	Public	-	Faculty	Active	-		...
10	Alumnus, Sample	Internal	Public	-	Alumni	Active	2018/08/29 13:35:56 CDT		...
11	Andress, Barbara	Internal	Public	-	Undergraduate Student	Active	-		...

Note: You can click one of the tabs at the top left of the display to limit your results to Staff, Public, or Contact users. For the purposes of reviewing migrated data, it is recommended that you limit your results to Public users.

You can filter results also by Account Type, Role, or Status. You may find it useful to use the Status filter to limit results to Active and Non-expired, Non-active or expired, or Locked out users. (See figure below.)

Find and Manage Users

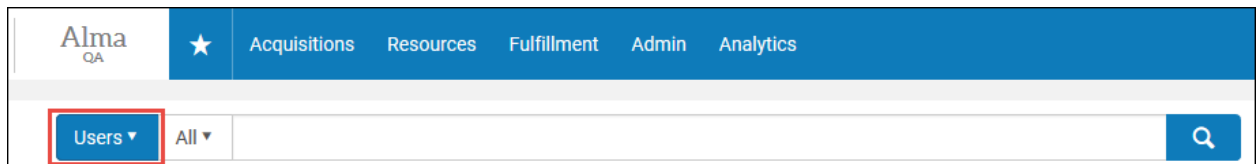
1 - 20 of 392

Account: All Role: All Status: Look-up or select

	Name	Account Type
1	Abutbul, Niv	Internal
2	Abutbul, Noam	Internal

2 Search for patrons using the persistent search box:

- a Verify that **Users** is selected in the drop-down list that precedes the persistent search box.



Alma QA

★ Acquisitions Resources Fulfillment Admin Analytics

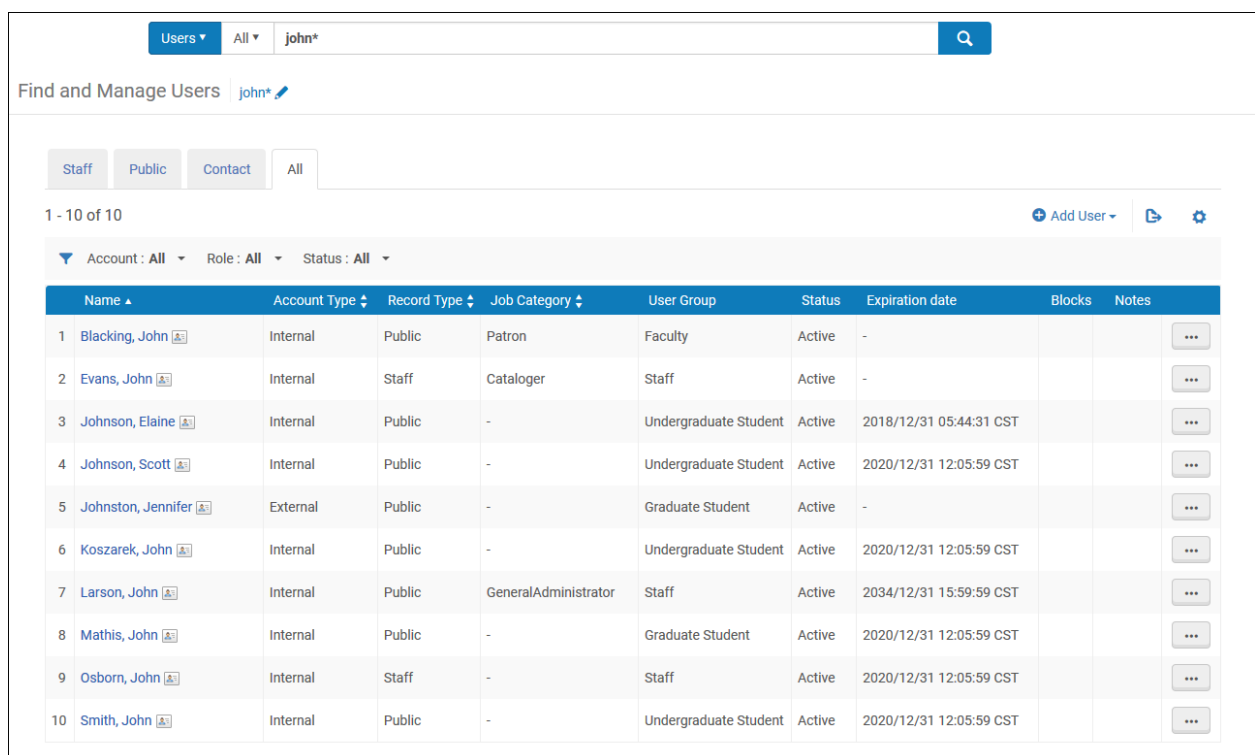
Users ▾ All ▾

Q

Note: You can search for a specific user using the Find box at the top of the page. You can search using First Name, Middle Name, Last Name, Primary Identifier, Identifiers, E-mail address, User Name, or Job Category. Alternatively, you can retain the default of All to search all indexed data.

- b Enter a search term.

The result is a list of patrons that match your search term(s). You can filter and sort this list the same way you can filter and search the full list.



Users ▾ All ▾ john* Q

Find and Manage Users john*

Staff Public Contact All

1 - 10 of 10 Add User +

Account : All ▾ Role : All ▾ Status : All ▾

	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
1	Blacking, John	Internal	Public	Patron	Faculty	Active	-		
2	Evans, John	Internal	Staff	Cataloger	Staff	Active	-		
3	Johnson, Elaine	Internal	Public	-	Undergraduate Student	Active	2018/12/31 05:44:31 CST		
4	Johnson, Scott	Internal	Public	-	Undergraduate Student	Active	2020/12/31 12:05:59 CST		
5	Johnston, Jennifer	External	Public	-	Graduate Student	Active	-		
6	Koszarek, John	Internal	Public	-	Undergraduate Student	Active	2020/12/31 12:05:59 CST		
7	Larson, John	Internal	Public	GeneralAdministrator	Staff	Active	2034/12/31 15:59:59 CST		
8	Mathis, John	Internal	Public	-	Graduate Student	Active	2020/12/31 12:05:59 CST		
9	Osborn, John	Internal	Staff	-	Staff	Active	2020/12/31 12:05:59 CST		
10	Smith, John	Internal	Public	-	Undergraduate Student	Active	2020/12/31 12:05:59 CST		

3 From the Manage Patron Services link:

- a On the Alma main menu, go to **Fulfillment > Checkout/Checkin > Manage Patron Services**.

Fulfillment	Admin	Analytics
Checkout/Checkin Manage Patron Services Return Items		

- b** In the search box, enter a patron barcode, or type all or part of a user name. If you are entering a name, wait until the system suggests possible names (which may take a few seconds), then select one of them from the list that appears and click **Go**.

Note: If you simply click Go after entering a name without the additional information that is in the system-supplied list, you will not retrieve any patron records.

[<](#) **Patron Identification**

Scan patron's ID or search for patron *

Use proxy ☐

This opens the Patron Services page.

- c** Click the ID link.

[<](#) **Patron Services**

Batson, Billy
Active balance 289.62 USD
ID 8888
User group Undergraduate Student

[Send Activity Report](#)
[Send Requests Report](#)

User Notes
User has 1 overdue item(s) in this library

Loans Returns Requests

Scan item barcode * [Create Item](#)

This opens the **Identifiers** tab of the full patron record.

Note that if the account type is External, a number of fields in the General Information tab will be grayed out, indicating that they cannot be edited in Alma.

- **First name and Last name:** The migration form asks for a method to separate the first and last names. If the separator is used in the source system data, the first and last names are written to separate fields in Alma. If a separator is not used, the entire name is written to the **Last name** field, and the First name field will be blank. (To separate the fields, you can manually edit an individual record or use a batch process such as the SIS integration or users API.
- **Primary Identifier:** Usually, this is the ID that is used by patrons to log into Primo, although other identifier types can be used as well.
- **Status:** Values are **Active** or **Inactive**. If the status of the user cannot be determined from source system data, all patron records will have a status of Active.
- **Expiration date and Purge date:** If these values are present in the source system, they should appear in Alma. Note that the status date in migrated patron records will be the date of record load unless the record has been edited since the load.
- **User roles:** Every patron should have the **Patron** role.

To view the **User Role Details** page, click the role name, or select **Edit** from the row actions list. On this page, you can view the **Status** and **Expiry date** for the role.

User Roles Details [Cancel] [Save Role]

Batson, Billy [i]

Primary identifier: 8888 Account Type: Internal Manage fulfillment activities

Record type: Public User group: Undergraduate St...

Role information [v]

Role name: **Patron** Scope: **Ex Libris University** [v]

Status: **Active** [v] Expiry Date: **2018/08/07** [X] [calendar icon]

- **Contact Information Tab:** Open this tab to review patron address, phone number, and e-mail information.

Note: Any data that is duplicated in the source system will be duplicated in Alma.

All e-mail addresses will include the word SCRUBBED. This is to prevent inadvertent transmission of messages during testing. SCRUBBED will be removed from e-mail addresses

as part of the switch to production.

If there is a check mark in the External Data column, the data cannot be edited in Alma. However, additional data can be added in Alma.

User Details Toggle Account Type Cancel Save

Batson, Billy i

Primary identifier 8888 **Account Type** Internal
Record type Public **User group** Undergraduate S...

General Information **Contact Information** **Identifiers** **Notes** **Blocks** **Fines/Fees** **Statistics** **Attachments** **Proxy For** **Audit**

Addresses 1 - 1 of 1 + Add Address 📄 ⚙️

	Preferred ▲	Address	Created By ▼	Creation Date ▼	Type	
1	✓	321 Main Street	EX_LIBRIS	2011/12/17 13:05:48 CST	Home	⋮

Phone Numbers + Add Phone Number

No records were found.

Email Addresses 1 - 1 of 1 + Add Email Address 📄 ⚙️

	Preferred ▼	Email Address	Created By ▲	Creation Date	Type	
1	✓	nosuchmail@no.such.mail.com	Team, Documentation	2017/09/10 04:32:12 CDT	School	⋮

3 Verify the accuracy of migrated data. Note these data elements:

- **Preferred:** If a preferred address, telephone number, or e-mail address can be distinguished in the source system, it will be marked with a check mark in the Preferred column.
- **Type:** If the source data includes an address type that cannot be mapped to a corresponding Alma type, the source system address type will be included in the **Note** field.

- 4 Open individual address records by clicking the address link or by selecting **Edit** from the row actions list.

Address Details

Cancel

Save Address

Batson, Billy

Primary identifier

8888

Record type

Public

Account Type

Internal

User group

Undergraduate S...

Manage fulfillment activities

Address Details

Address types *

☐ Alternative

☒ Home

☐ School

☐ Work

Address line 1 *

321

Address line 2

Main Street

Address line 3

Address line 4

Address line 5

City

New York City

State/Province

NY

Postal code

Country

United States

Note

Start date

2011/12/11

X

End date

2012/12/10

X

Preferred address *

☒ Yes


☐ No

Note the following details:

Address structure: If City, State/Province, Postal Code, and Country can be distinguished in the source system data, values will be written to the corresponding Alma fields. If they cannot, all address data will be written to the **Street address** field.

- 5 **Identifiers tab:** Open this tab to review patron identifiers. Note that if there is a check mark in the External Data column, the data cannot be edited in Alma. However, an identifier can be added in Alma.

[User Details](#)
Toggle Account Type
Cancel
Save



Batson, Billy

Primary identifier 8888

Record type Public

Account Type Internal

User group Undergraduate Stu...

[General Information](#)
[Contact Information](#)
[Identifiers](#)
[Notes](#)
[Blocks](#)
[Fines/Fees](#)
[Statistics](#)
[Attachments](#)
[Proxy For](#)
[Audit](#)

1 - 2 of 2

	Active	ID Type	Value	Note	Created By	Creation Date	
1	<input checked="" type="checkbox"/>	Barcode	8888	-	EX_LIBRIS	2011/12/17 13:05:48 CST	...
2	<input checked="" type="checkbox"/>	Institution ID	388	-	EX_LIBRIS	2011/12/17 13:05:48 CST	...

- 6 Verify the accuracy of converted data.
 - a There should be one ID in Alma corresponding to each ID in the source system.
 - b **Active:** There should be a check mark in this column if the ID is active, and no check mark if it is inactive.
 - c **ID type** is based on source system definitions. Verify that a value for the ID type to be used for Primo authentication is present in the patron's record.
- 7 **Notes tab:** If there are note(s) in the patron record, there will be a check mark in the Notes column in the list of patrons.

	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes	
51	Bryan, Bonita	Internal	Staff	-	Staff	Active	2020/12/31 12:05:59 CST			...
52	Bryan, Jean	Internal	Public	-	Undergraduate Student	Active	2017/12/31 05:44:31 CST			...
53	Buldyrev, Vlad	Internal	Staff	General Administrator	Graduate Student	Active	-			...
54	Bunevski, Maria	Internal	Staff	General Administrator	Undergraduate Student	Active	-	✓	✓	...
55	Burkhardt, Ted	Internal	Public	-	Undergraduate Student	Active	2018/12/31 05:44:31 CST			...
56	Cabaup, Jean	Internal	Staff	-	Staff	Active	-			...
57	Carney, Marian	Internal	Public	-	Guest	Active	2020/12/31 12:05:59 CST			...
58	Carr, Sara	Internal	Public	Patron	Undergraduate Student	Active	-		✓	...
59	Cataloger, Alma	Internal	Staff	Cataloger	Staff	Active	-			...
60	Cataloging Manager, Alma	Internal	Staff	Cataloging Manager	Staff	Active	-			...

Open the Notes tab in an individual patron record to view the notes.

User Details

Toggle Account Type

Cancel

Save

Carr, Sara

Primary identifier

sarac

Account Type

Internal

Record type

Public

User group

Undergraduate ST...

Manage fulfillment activities

General Information

Contact Information

Identifiers

Notes

Blocks

Fines/Fees

Statistics

Attachments

Proxy For

Audit

1 - 1 of 1

+ Add Note

Note Type : All

Note	Type	User viewable	Created By	Creation Date
1 Please contact the registrar	Registrar	✓	circ	2015/01/05 01:52:52 CST

There should be a note in Alma corresponding to each note in the source system.

- **Type:** If there are note types in the source system that can be mapped to corresponding Alma note types (such as library, barcode, address), this will be done. Otherwise, all converted notes will have a type of **Library**.
- **User viewable:** If the source system data includes an indication that the note can be viewed by the user, there will be a check mark in this column. Otherwise, there will be no check mark.

- 8 **Blocks tab:** Since few patrons have blocks, you will need to identify some who do in order to review this data.

If there are blocks in the patron record, there will be a check mark in the Blocks column of the list of patrons.

Users

All

Find and Manage Users

Staff

Public

Contact

All

21 - 40 of 392

+ Add User

Account : All

Role : All

Status : All

	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
21	Barnes, Patrick	Internal	Public	-	Faculty	Active	2021/12/31 03:20:04 CST		
22	Bartels, Carrie	Internal	Staff	-	Undergraduate Student	Active	-		
23	Batson, Billy	Internal	Public	-	Undergraduate Student	Active	2017/12/31 23:59:59 CST	✓	
24	Baumgartner, Brad	Internal	Public	-	Undergraduate Student	Active	2018/12/31 05:44:31 CST		

Open the record for the patron, then open the **Blocks** tab to view the blocks. You may need to select **Edit** from the row actions list to see a complete Note value.

User Details Toggle Account Type Cancel Save

Batson, Billy Manage fulfillment activities

Primary identifier 8888 **Account Type** Internal **Record type** Public **User group** Undergraduate ...

General Information **Contact Information** **Identifiers** **Notes** **Blocks** **Fines/Fees** **Statistics** **Attachments** **Proxy For** **Audit**

1 - 1 of 1 + Add Block Share Settings

Filter : All

Active	Type	Description	Note	Owner	Created By	Creation Date	Expiry Date	Attached to loan
<input checked="" type="checkbox"/>	Loan	User is suspended	User has been repeatedly warned abo...	Ex Libris University	Team, Documentati...	2017/09/10 07:22:16 CDT	-	...

Note: There should be one block in Alma that corresponds to each block in the source system.

In all cases, the record should be marked **Active**.

Type will be **General** in all cases.

Owner may be the institution or a library.

If an end date for the block appears in the source system, this date will be in the **Note** field.

Testing Basic Patron Record Functionality

1 Add data to a patron record.

Open a patron record.

- a Open the **Notes** tab of the record.
- b Click the **Add Note** button. Type a note in the **Note** box. Select a type from the **Type** drop-down list.

Note *

Type

Address

User viewable

☐

Clear

Add

- c Click **Add**.

The note you have just added should appear in the list of notes.

< User Details

Toggle Account Type

Cancel

Save

Batson, Billy

Primary identifier 8888

Account Type Internal

Record type Public

User group Undergraduate ...

Manage fulfillment activities

General Information

Contact Information

Identifiers

Notes

Blocks

Fines/Fees

Statistics

Attachments

Proxy For

Audit

1 - 1 of 1

+ Add Note

Note Type : All

Note	Type	User viewable	Created By	Creation Date
1 Test Note	General		Docteam	2017/09/10 07:40:06 CDT

- 2 Edit data in a patron record.

Open the **General Information** tab of a patron record.

- a Write down the **User Group** value for this patron.

< User Details
Toggle Account Type
Cancel
Save

Batson, Billy
Manage fulfillment activities

Primary identifier 8888
Account Type Internal

Record type Public
User group Undergraduate...

General Information
Contact Information
Identifiers
Notes
Blocks
Fines/Fees
Statistics
Attachments
Proxy For
Audit

User Information

First name * **Billy**
Middle name

Last name * **Batson**
Primary identifier * **8888**

Title
PIN number
Generate

Job category **Please select a value**
Job description

Gender
User group * **Undergraduate Student**

Campus
Website URL

Preferred language **English**
Status **Active**

Status date **2011/12/17**
Birth date

Expiration date **2017/12/31**
Purge date **2014/12/31**

Resource sharing library **Resource Sharing Library**

Cataloger level **[00] Default Level**

- b Now select a different user group from the drop-down list.
- c Click **Save**.

The user group you have just selected should appear in the User Group column for this patron in the list of patrons.

Find and Manage Users

Staff
Public
Contact
All

21 - 40 of 392

Add User

Account : All
Role : All
Status : All

	Name ▲	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Block:	Notes
21	Barnes, Patrick	Internal	Public	-	Faculty	Active	2021/12/31 03:20:04 CST		
22	Bartels, Carrie	Internal	Staff	-	Undergraduate Student	Active	-		
23	Batson, Billy	Internal	Public	-	Academic Staff	Active	2017/12/31 23:59:59 CST	✓	✓
24	Baumgartner, Brad	Internal	Public	-	Undergraduate Student	Active	2018/12/31 05:44:31 CST		

- d Restore the patron's original user group value.
- 3 Delete data in a patron record.

Open the patron record to which you added a note in step 1.

- a Open the **Notes** tab.
- b Select **Actions > Delete** for the note you added.

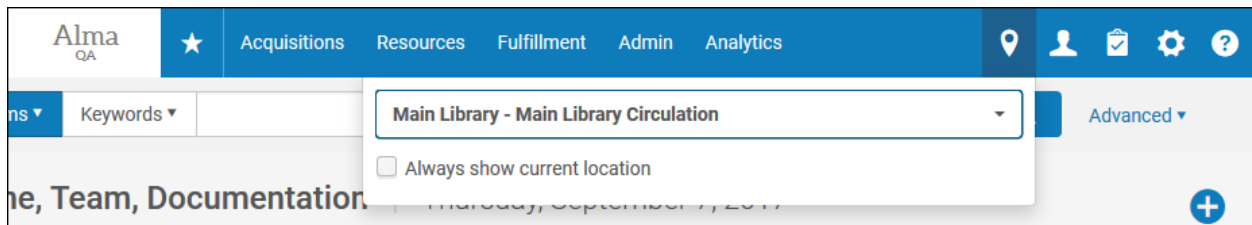
The note should be removed from the list of notes.

The screenshot shows the 'User Details' page for a patron named 'Batson, Billy'. The page has a header with a back arrow, the title 'User Details', and buttons for 'Toggle Account Type', 'Cancel', and 'Save'. Below the header is a profile section with a placeholder image, the name 'Batson, Billy', and a list of details: 'Primary identifier 8888', 'Record type Public', 'Account Type Internal', and 'User group Undergraduate ...'. A link 'Manage fulfillment activities' is also present. Below this is a horizontal tab bar with options: 'General Information', 'Contact Information', 'Identifiers', 'Notes' (selected), 'Blocks', 'Fines/Fees', 'Statistics', 'Attachments', 'Proxy For', and 'Audit'. Under the 'Notes' tab, there is a '+ Add Note' button and a filter 'Note Type : All'. The main content area shows 'No records were found.' with a list icon.

4

Loans

Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



For more information on the persistent menu, see [The Alma User Interface](#) in the Customer Knowledge Center.

Finding Loans

Note: Only active loans are migrated.

In order to find and review loans, identify patrons that have loans and search for them in any of the ways described above.

Alternatively, you can [create a fulfillment set](#) in order identify active loans. To create a fulfillment set:

- 1 In the main Alma menu, navigate to **Fulfillment > Advanced Tools > Create Fulfillment Sets**.
- 2 Enter a name and description.
- 3 For the Loan Status field, select **Normal**.

Manage Fulfillment Sets
View My Sets
Cancel
Save

Name *
Current Loans
Description *
Loans 20170910
Note
Loan status
Normal
Due date after
Due date before
Status date after
Status date before

- 4 Click **Save**.
- 5 Click **View My Sets**.
- 6 Click **Members** from the row actions list of the set you just created.

Manage Sets
Back

My Sets
Public Sets
All Sets

1 - 2 of 2
Name
Add Set

Content Type : All


Active	Name ▲	Type	Content Type	Creation Date	
1	Current Loans	Itemized	Physical items	2017/09/10 08:10:29 CDT	...
2	libraries in title	Logical	Physical items	2017/09/08	Edit Members Duplicate Combine sets Create titles set Delete

- 7 In any of the results, click **Loan**.

Physical items ▾
Keywords ▾

Physical Items (1 - 20 of 352)

☐ Select All

1
☐


Mrs. Queen takes the train : a novel / William Kuhn.

Book By Kuhn, William M., (New York : Harper [2012])

Barcode: 2301536877

Update Date: 2016/11/01

Library: Graduate Library

Process type: **Loan**

Due Date: 2017/05/02 20:00:00 CDT

Permanent Location: Stacks


[Other details](#)


Call Number: PR6111.U368 M77 2012

Call Number Type: Library of Congress classification

Status: Item not in place

Material Type: Book

 Orders: 1

2
☐


101 uses for a dachshund.

Book By Willow Creek Press (Minocqua, Wis. : Willow Creek Press 2013.)

Barcode: 2015067525

Update Date: 2016/02/09

Library: Science Library

Process type: **Loan**

Due Date: 2017/11/04 19:00:00 CDT

Permanent Location: Science Stacks

[Other details](#)

Call Number: SF429.D25 A16 2013

Call Number Type: Library of Congress classification

Alternative Call Number Type: Library of Congress classification

Status: Item not in place

Material Type: Book

8 To examine additional loans to this patron, click the borrower name.

On Loan Item

Title
Mrs. Queen takes the train : a novel / William Kuhn.

Description
-

Borrower
[Moore, Lesli](#)

Loan Date
2017/05/02 08:43:21 CDT

Due Date
2017/05/02 20:00:00 CDT

Loan status
Normal

Process ID
1293578040000521

Booking loan?
No

A list of the patron's active loans opens. Note that you can sort the list by Title, Due Date, Loan Date, or Loan Status (ascending or descending in all cases).

Patron Services
Back

Moore, Lesli

Primary identifier 200040
Record public type
Account Internal Type
User Gradua... group

User Notes
User has 2 overdue item(s). 0 in this library.

Loans
Returns
Requests

1 - 2 of 2 Search
Renew Selected
Renew All
Change due date

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1	Queen Elizabeth I	2017/05/02 20:00:00 CDT	8954392	25.00 USD	2017/05/02	Normal	-	Gradua... Library	✓
2	Mrs. Queen takes the train : a novel / William Kuhn.	2017/05/02 20:00:00 CDT	2301536877	25.00 USD	2017/05/02	Normal	-	Gradua... Library	✓

Reviewing Loans

Review the following loan data for multiple patrons.

Number of Loans

Verify that the patron has the same number of **active** loans in Alma and the source system.

Loaned Item Details

- Verify that the items shown as on loan to the patron in Alma match the items on loan to the patron in the source system.
- Verify that each of the following details for the loaned item is correct.
 - Barcode:** Note that the barcode links to the item record.
 - Title**
 - Item Policy:** This should be the same value as that in the **Item policy** field in the item record.
 - Library:** This should be the same as the **Temporary library** value in the item record if the item is assigned to a temporary location, or the **Permanent library** value in the item record if it is not in a temporary location.

Loan Details

Verify that the following data is correct:

- Due date and time
- Loan date
- Loan status: Possible values are Normal, Renewed, Lost, Claim Returned.
- Fine: Note that if there are multiple fines for the same item, such as a lost item replacement fee plus a lost item processing fee, this value should be the total of all fines associated with the item.

Note: The value of accruing fines (for example, overdue fines for open loans) will likely differ from those in the source system. This is because the proper fine amounts had not yet been configured in Alma at the time of your test load migration. This issue should be largely resolved in the cutover migration.


Loan Audit Trail

To open the Loan Audit Trail display, click the title link in the list of loans, or select **Loan History** from the row actions list.

<

Loan Audit Trail

Back



Stress and anxiety / edited by Irwin G. Sarason and Charles D. Spielberger.

Description

-

Borrower

Gibbons, Tony 

Loan Date

2017/05/02 09:48:17 CDT

Due Date

2017/06/02 09:48:17 CDT

Loan status

Normal

Process ID

1293597860000521


Return Date

-

Booking loan?

No



Action Date	Action	Due Date	Loan Status	Desk	Operator	Additional Information
1 2017/05/02 09:48:17 CDT	Loan	2017/06/02 09:48:17 CDT	Active	Main Library Circulation	Docteam 	-

The types of transactions that appear in the Loan Audit Trail will depend on what data is available in the source system.

Verify the accuracy of the information in each audit transaction.

Click **Back** to return to the list of loans.

Loan Notes

If there is a note associated with a loan, there will be a checkmark in the Loan Notes column in the list of loans.

Loans	Returns	Requests
-------	---------	----------

Scan item barcode * OK Create Item

1 - 2 of 2 Search Renew Selected Renew All Change due date

Loan Display : All loans ▾

<input type="checkbox"/>	Title ▾	Due Date ▾	Barcode	Fine	Loan Date ▾	Loan Status ▾	Item Policy	Library ▾	Loan Notes	
1 <input type="checkbox"/>	Selected poems [by] Anna Akhmatova; translated with an introduction by Richard McKane, and an essay by Andrei Sinyavsky.	2017/10/03 23:59:29 CDT	28780	-	2017/09/03	Normal	-	Main Library	✓	...
2 <input type="checkbox"/>	The mental measurements yearbook.	2017/08/07 03:06:59 CDT	66430	-	2017/08/07	Normal	Null	Main Library	✓	...

To view the note(s), select **View Notes** from the row actions list.

< Loan Notes				Cancel
--------------	--	--	--	--------

The mental measurements yearbook.

Barcode 66430
Patron Batson, Billy

1 - 1 of 1 Created by ▾ Q + Add Note ▾

	Created On ▾	Updated On ▾	Updated By ▾	Note	
1	2017/08/...	2017/08/07	Team, Documentation	Overridden blocks (Loan): Item is not loanable User does not have a patron role or the role has expired	...

Verify the accuracy of the converted data.

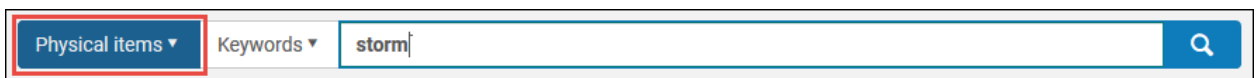
Note: Additional information—for example, a count of the number of times the loan has been renewed—may be migrated to the notes.

Testing Basic Loan Functionality

Note: Loaning an item requires having first supplied your fulfillment policy preferences to your Ex Libris Project Manager in the Ex Libris configuration form. Test loaning an item according to each of the rows in the Policies, TOU and Rules tab—that is, for each combination of item Location Type and Patron Type, or Item Exception Type.

1 Find an item to check out.

- a Identify an item that can be checked out. From the persistent search box, select Physical Items and enter your keyword.




The image shows a search interface with a dropdown menu labeled 'Physical items' and a search box containing the text 'storm'. A red box highlights the 'Physical items' dropdown menu.

For more information on the search box, see [Searching in Alma](#) in the Customer Knowledge Center.

- b From the Physical Items list, select **Items** from the row actions list for the selected item.

Physical Item Editor
Cancel
Save


After the storm : a novel / Nelson, Annie Greene. Reprint Co Spartanburg, S.C. : 1976 [c1942] [0871522438 :]

Holding	Main Library: Stacks; PZ3.N329 Af10	Holdings ID	226008660000541	View all holdings
Barcode	69263	Item ID	236008650000541	View all items
Process type	-	Status	Item in place	Browse shelf listing

General Information
ENUM/CHRON Information
Notes
History

Barcode	<input type="text" value="69263"/>	Generate	Copy ID	<input type="text" value="0"/>
Material type	<input type="text" value="Book"/>		Item policy	<input type="text"/>
Provenance	<input type="text" value="Winter"/>		Is magnetic	<input type="text" value="No"/>
PO Line	<input type="text" value="Select from a list"/>		Issue date	<input type="text"/>
Receiving date	<input type="text"/>		Expected receiving date	<input type="text"/>
Enumeration A	<input type="text"/>		Enumeration B	<input type="text"/>
Chronology I	<input type="text"/>		Chronology J	<input type="text"/>
Description	<input type="text"/>	Generate		
Pages	<input type="text"/>		Pieces	<input type="text" value="1"/>
Replacement cost	<input type="text"/>		Receiving operator	<input type="text"/>
Process type	<input type="text"/>			

Inventory Number Information

Inventory number	<input type="text"/>	Inventory date	<input type="text"/>
Inventory price	<input type="text"/>	Clear Inventory Information	

Location Information

Permanent library *	<input type="text" value="Main Library"/>	Permanent location *	<input type="text" value="Stacks"/>
Alternative call number type	<input type="text"/>	Alternative call number	<input type="text"/>
Source (Subfield 2)	<input type="text"/>		
Storage location ID	<input type="text"/>	Choose prefix	<input type="text"/>
		Generate	Calculate

Temporary Location Information

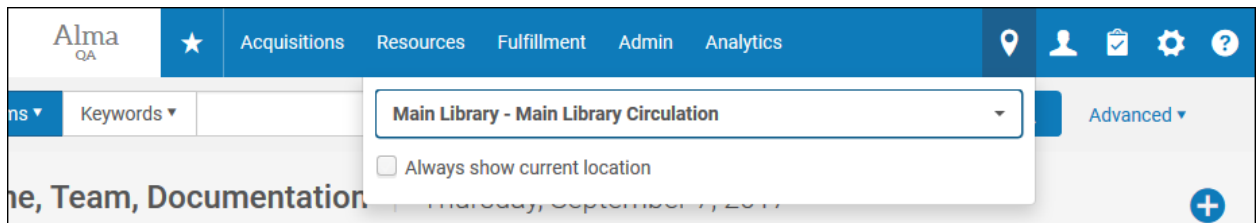
Item is in temporary location	<input checked="" type="radio"/> No <input type="radio"/> Yes		
Temporary library	<input type="text" value="Select from a list"/>	Temporary location	<input type="text"/>
Temporary call number type	<input type="text"/>	Temporary call number	<input type="text"/>
Source (Subfield 2)	<input type="text"/>		
Temporary item policy	<input type="text"/>	Due back date	<input type="text"/>

The item should be from a circulating collection that has a typical loan period. Record the item barcode and the owning library.

2 Check out an item to a patron.


- a Log on to Alma as a user who has a Circulation Desk Operator role **for the library that owns the item selected in step 1.**

- b If necessary, change your location to a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



For more information on the persistent menu, see [The Alma User Interface](#) in the Customer Knowledge Center.

- c Identify a patron to whom you will check out an item. Make certain he or she has a **Patron Role** with a relevant **Scope**, an **Active** status, and an **Expiration Date** that has not passed. Record the patron's ID.
- To verify the user role details, open the General Information tab for an individual patron record. If you are starting from a list of patrons, either click the name link or select **Edit** from the row actions list.
 - At the bottom of the page, click the role name, or select **Edit** from the row actions list. On this page, you can view the Status and Expiry date for the role.

User Roles Details			
<div>  <div> Baumgartner, Brad i </div> </div>			
Primary identifier	200099	Account Type	Internal
Record type	Public	User group	Undergradua...
Role information			
Role name	Patron	Scope	Ex Libris University
Status	Active	Expiry Date	2099/12/30

- d On the Alma main menu, go to **Fulfillment > Checkout/Checkin** and select **Manage Patron Services**.
- e Enter the patron ID in the **Scan patron's ID** box.

Patron Identification Go to Return Items Register New User


Scan patron's ID or search for patron * Go

Use proxy ☐

f Click **Go** or press **Enter**.

g Enter the item barcode in the **Scan item barcode** box.

Patron Services Edit User Info Submit Request Refresh Blocks/Notes Done



Baumgartner, Brad

Active balance 0.00 USD Send Activity Report

ID 200099 Send Requests Report

User group Undergraduate Student

User Notes

No notes or notifications

Loans Returns Requests

Scan item barcode * OK Create Item

[Search](#)

Loan Display : All loans ▾

No records were found.

h Click **OK** or press **Enter**.

The loan information should now appear in the list of loans for this session.

Patron Services

Edit User Info
Submit Request
Refresh Blocks/Notes
Done

Baumgartner, Brad

Active balance

0.00 USD

Send Activity Report

ID

200099

Send Requests Report

User group

Undergraduate Student

User Notes

No notes or notifications

Loans

Returns

Requests

Scan item barcode *

OK

Create Item

1 - 1 of 1

Search

Renew Selected

Renew All

Change due date

Loan Display : All loans

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1	<input type="checkbox"/> <div>After the storm : a novel / by Annie Green Nelson.</div>	2017/10/11 08:07:14 CDT	69263	-	2017/09/11	Normal	-	Main Library	...

3 Renew a loan.

- a Select Loan Display=All to open the list of a patron's loans.
- b Select the check box at the beginning of the line for two or three loans.

Patron Services
Edit User Info
Submit Request
Refresh Blocks/Notes
Done

Baumgartner, Brad

Active balance 0.00 USD
Send Activity Report
ID 200099
Send Requests Report
User group Undergraduate Student

User Notes

No notes or notifications

Loans
Returns
Requests

Scan item barcode

Create Item

1 - 3 of 3
Search
Renew Selected
Renew All
Change due date

Loan Display : All loans

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1	<input checked="" type="checkbox"/> Follow the wind / by Alvin Tresselt ; pictures by Roger Duvoisin.	2017/10/11 08:32:26 CDT	48042	-	2017/09/11	Normal	-	Main Library	...
2	<input checked="" type="checkbox"/> Pathos of power [by] Kenneth B. Clark.	2017/10/11 08:31:56 CDT	41775	-	2017/09/11	Normal	-	Main Library	...
3	<input type="checkbox"/> After the storm : a novel / by Annie Green Nelson.	2017/10/11 08:07:14 CDT	69263	-	2017/09/11	Normal	-	Main Library	...

- c Click the **Renew Selected** button.

You should get a message at the top of the page stating that the renewal was successful or that it could not be performed.

Patron Services
Edit User Info
Submit Request
Refresh Blocks/Notes
Done

2 loans renewed out of 2 attempted renewals.

If the renewal was successful, the due date should have changed (unless the loan was just created). The new due date will depend on fulfillment setup.

A new, unlabeled column will appear in the list of loans just after the Title column. For the renewed items, this column will have a check mark in a green circle. This indicates that a Loan Audit transaction was written.

	Title ▾		Due Date ▾	Barcode	Fine	Loan Date ▾	Loan Status ▾	Item Policy	Library ▾	Loan Notes
1	<input type="checkbox"/> Follow the wind / by Alvin Tresselt ; pictures by Roger Duvoisin.	✓	2017/10/11 08:40:36 CDT	48042	-	2017/09/11	Renewed	-	Main Library	...
2	<input type="checkbox"/> Pathos of power [by] Kenneth B. Clark.	✓	2017/10/11 08:40:37 CDT	41775	-	2017/09/11	Renewed	-	Main Library	...
3	<input type="checkbox"/> After the storm : a novel / by Annie Green Nelson.		2017/10/11 08:07:14 CDT	69263	-	2017/09/11	Normal	-	Main Library	...

To see this transaction, select **Loan History** from the row actions list.

Loan Audit Trail

Back

Follow the wind / by Alvin Tresselt ; pictures by Roger Duvoisin.

Description

Borrower

Loan Date

Due Date

Loan status

Process ID

Return Date

Booking loan?

-

Baumgartner, Brad

2017/09/11 08:32:26 CDT

2017/10/11 08:40:36 CDT

Renewed

1300818270000521

-

No

Action	Date	Action	Due Date	Loan Status	Desk	Operator	Additional Information
1	2017/09/11 08:40:36 CDT	Renewed	2017/10/11 08:40:36 CDT	Active	Main Library Circulation	Team, Documentation	-
2	2017/09/11 08:32:26 CDT	Loan	2017/10/11 08:32:26 CDT	Active	Main Library Circulation	Team, Documentation	-

5

Hold Requests

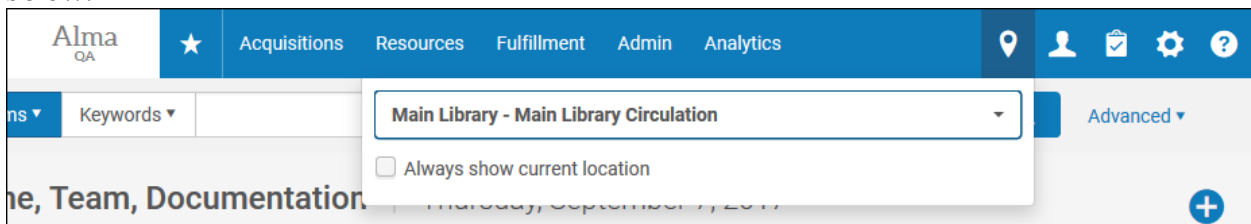
Only hold requests that are waiting on the hold shelf for patron pickup are migrated.

Finding Hold Requests

On the persistent menu bar, search Requests where All = *. Any hold requests that were migrated are displayed. (Note that these results may no longer reflect active hold requests in your source system, as a significant amount of time may have passed since your data was extracted from your source system).



Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



For more information on the persistent menu, see [The Alma User Interface](#) in the Customer Knowledge Center.

- 1 Open the **Patron Services** page (Fulfillment > Checkout/Checkin > Manage Patron Services) for an individual patron that has items on the hold shelf, using any of the methods for finding a patron described in the section on Patron Records above.
- 2 Open the **Requests** tab to see a list of hold requests. Note that you can sort the list by Request Date. You can also search for a request in the list by entering a title keyword in the **Find** box.

Reviewing Hold Requests

- 1 Go to **Fulfillment > Resource Requests > Active Hold Shelf** and verify that the requests you examined above appear in the hold shelf in Alma. (Verify that your **Currently at** location is the same as the **Managed By Desk** of the request).

Active Hold Shelf Items

Back

Active Hold Shelf Items

Sort by Booking Request St 1 - 3 of 3

1

Fish oil : the natural anti-inflammatory / Joseph C. Maroon and Jeffrey Bost.

Cancel Request

Update Expiry

...

Location: Main Library - Stacks
Call Number: RB131 .M37 2006
Barcode: 14266868
Material Type: Book

Held For: Pierson, Laura
Preferred Identifier: laura.pierson
Held Since: 2017/05/01
Held Until: 2017/05/06

Place in Queue: 0
Note: This is a note

2

Money in your pocket / Paul N. Strassels.

Cancel Request

Update Expiry

...

Location: Main Library - Stacks
Call Number: KF6297 .S8 1981
Barcode: 27380
Material Type: Book

Held For: Smith, Thomas
Preferred Identifier: tsmith
Held Since: 2017/05/01
Held Until: 2017/05/06

Place in Queue: 0

3

The King's fifth / Scott O'Dell.

Cancel Request

Update Expiry

...

Location: Main Library - Juvenile Education Collection
Call Number: Y 813.54 O23k
Barcode: 16483
Material Type: Book

Held For: Tapia, James
Preferred Identifier: james.tapia
Held Since: 2017/05/01
Held Until: 2017/05/06

Place in Queue: 0

- 2 Return to the Patron Services page and review the data in the Requests tab.

Patron Services

Edit User Info

Submit Request

Refresh Blocks/Notes

Done

Smith, Thomas
Active balance 50.00 USD

Pay

ID tsmith
User group Alumni

[Send Activity Report](#)
[Send Requests Report](#)

User Notes
 User has 1 item(s) waiting for pickup at this desk.

Loans

Returns

Requests

1 - 1 of 1

Title

Request Type

Request Date

Start Time

End Time

Expiry Date

Task

Process Date

Managed By

Place in Queue

Resource Sharing Request

1	Money in your pocket / Paul N. Strassels.	Patron physical item request	2016/01/20	-	-	2017/05/06	On Hold Shelf	2017/05/01	Main Library: Main Library Circulation	0	No	...
---	---	------------------------------	------------	---	---	------------	---------------	------------	--	---	----	-----

- Request Type should be **Patron physical item request** in all cases.

- **Request Date:** Verify the accuracy of this date.
- **Task** should be **On Hold Shelf** in all cases.
- **Process Date:** Verify that this is the date the item was placed on the hold shelf.
- **Managed by:** This should be the library and desk where the hold shelf is and should be based on Pickup Location.

3 Review data on the Request Queue page.

Click the number in the **Place in Queue** column (above) to open this page.

Request Queue
Back

Money in your pocket /

Location	Stacks
Call Number	KF6297 .S8 1981
Maximum Active Requests	1

1 - 1 of 1

Request Type	Destination	Current Activity	Priority	Barcode	Material Type	Request Date	Interested Until	Requester	Description	Requester Group
1 Patron physical item request	Main Library Circulation	On Hold Shelf	Medium	27380	Book	2016/01/20	-	Smith, Thomas	-	Alumni

Additional data on this page includes:

- **Priority:** This will always be **High** in migrated records.
- **Barcode:** The barcode is a link to the item record. Using these links is the best way to verify that the items in the patron's hold list are the same in Alma and the source system.
- **Call Number and Material Type:** These values should be the same as those in the item record.

Click the back button to return to the request.

4 Review notes associated with the hold request on the Create Request page.

From the Active Hold Shelf page, click the title's link to open the Create Request page.

Patron Services

Edit User Info Submit Request Refresh Blocks/Notes Done

Smith, Thomas

Active balance 50.00 USD [Pay](#)

ID tsmith

User group Alumni

[Send Activity Report](#)

[Send Requests Report](#)

User Notes

User has 1 item(s) waiting for pickup at this desk.

Loans Returns Requests

1 - 1 of 1 Title

Request Type: All Task: All

Title	Request Type	Request Date	Start Time	End Time	Expiry Date	Task	Process Date	Managed By	Place in Queue	Resource Sharing Request	
1 Money in your pocket / Paul N. Strassels.	Patron physical item request	2016/01/20	-	-	2017/05/06	On Hold Shelf	2017/05/01	Main Library: Main Library Circulation	0	No	...

- Select **Edit** from the row actions list to open the Create Request page.
- Type a note in the **Note** field.

Create Request

Cancel Submit

Money in your pocket / Paul N. Strassels.

Institution Ex Libris University

Create Request

Request Type * Patron physical item request

Requester * Smith, Thomas

Note Patron requires accessible pickup location.

Pickup At * Main Library

Override On Shelf Request Policy

Additional Request Attributes

Material Type Book

Date Needed By

Loan Period

- c Click **Submit**.

The Patron Services page opens with a message indicating that the update was successful.

- 2 Edit the pickup location for a hold request.

Open the display of the list of a patron's hold requests.

- a Select **Edit** from the row actions list to open the Create Request page.
- b Select a different value from the **Pickup at** drop-down list.

- c Click **Submit**.

The Patron Services page opens with a message that the hold request has been updated.

- 3 Delete a note from a hold request.

Open the list of hold requests you opened in Step 1.

- a Open the Create Request page for the record to which you added a note.
- b Delete the note.

- c Click **Submit**.

The Patron Services page opens to the list of hold requests. A message displays indicating that the request was updated.

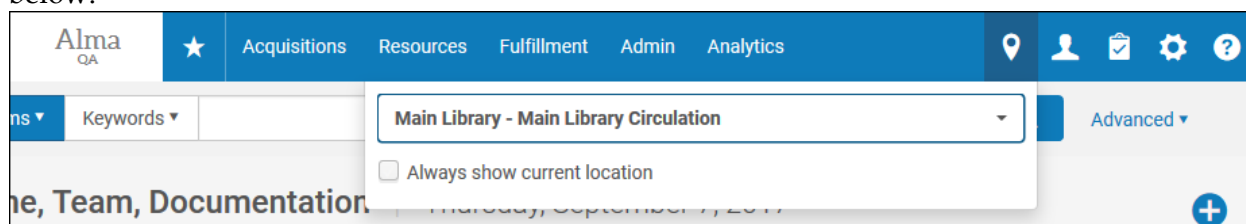
Testing Hold Request Scenarios

Attempt to create a patron physical item request (=hold request) for each of the scenarios defined in your configuration form. That is, for each row in the Policies, TOU and Rules tab – for each combination of item Location Type and Patron Type and/or Item Exception Policy – attempt to create a hold request. Verify the results by examining the applicable Request TOU via Fulfillment > Advanced Tools > Fulfillment Configuration Utility > Request.

6

Fines and Fees

Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



For more information on the persistent menu, see [The Alma User Interface](#) in the Customer Knowledge Center.

Finding Fines and Fees Transactions

Identify patrons that have Fines or Fees in the source system in order to conduct your review.

There are two ways of opening a list of **Fines and Fees** for review.

- 1 Search for a patron record as instructed above, using **Manage Users** or the persistent search box. Then open the patron record and click the **Fines and Fees** tab.
- 2 Select **Manage Patron Services**, and enter a Barcode or a Patron Name as instructed above. Then click the **Active Balance** link in the brief patron record. The Fines and Fees tab opens in the full patron record.

Note: The list opens with the default fine/fee type **All** and status **Active**. You also can filter the list by multiple fine/fee types, or by status: **Active**, **Closed**, **In Dispute**, or **All**.

You can sort the list by Creation Date, Fine/Fee Type, Status, Fee Owner or Title.

You can search for a specific fine/fee by title of the item, the library that assessed the fine, or transaction ID.

Overdue fines are not applied to the patron's account until the loan is closed (e.g. the item is returned). The current amount of such fines is displayed in the Patron Services page, but is not included in the Fines/Fees tab of the user record. Such fines may differ in value from those in the source system since the proper overdue fine policies had not yet been configured in Alma at the time of your test load migration. This difference should be largely resolved during the cutover migration.

Reviewing Fines and Fees

- 1 Verify that the patron's active balance is correct.
- 2 Verify that the patron has the same number of open fines/fees in Alma as in the source system. Select fine/fee type **All** and status **All** to display the total number. Note that in some source systems there may be multiple transactions for the same fine/fee, especially if it was partially, but not fully, paid. In Alma, there will be only one fine/fee record in these cases.
- 3 Verify that fines/fees are for the same items in Alma and the source system in cases where the fine/fee is associated with an item.
- 4 Review the following details. Be sure to review fines/fees with all relevant types and statuses.
 - **Creation Date:** Verify that this date matches the date in the source system.
 - **Fine/Fee type:** Verify that source system types have been mapped correctly to Alma types.
 - **Status:** Verify that source system statuses have been mapped correctly to the Alma statuses **Active** or **In Dispute**. (Closed fines/fees are not migrated).
 - **Comment:** Any data in the source system that provides further information about the transaction, such as notes or descriptions, should be copied to this field.
 - **Fee Owner:** This should be the library that assessed the fine/fee, which will be the library that owns the item when the fine/fee is associated with an item – that is, when there is a value in the Title column. If the owning library in the source system does not exist in Alma, the Fee Owner will be the Institution.
 - **Title:** This is the title of the item for which the fine/fee was assessed, if the fine/fee is associated with an item.
 - **Original Amount and Remaining Balance**
 - For a fine/fee with a status of **Active**, Original Amount and Remaining Balance in migrated data should be the same.
 - For a fine/fee with a status of **Closed**, the Original Amount should be the amount paid or waived, and the Remaining Balance should be 0.00.

Note: For most incoming library systems, if a fine/fee has been partially but not fully paid in the source system, only the amount still owed will be migrated to Alma as an active fine/fee. Transaction details are typically not migrated.

- 5 Voyager only: Review transaction details for partially paid fines/fees.
 - Click the **Remaining Balance** link to open a list of transaction details for the fine/fee. (Note that if the Original Amount and Remaining Balance values are equal, no records will be found when you click the Remaining Balance link.)
 - Verify that the following transaction data is correct.
 - **Transaction Type:** Possible values are Paid, Waive, or Transfer. Verify that source system values have been mapped to the appropriate Alma value.
 - **Amount**
 - **Transaction Date**

Note: Payment Method will not be converted.

Testing Basic Fines and Fees Functionality

1 Add a fine/fee.

Open a patron record, then open the **Fines and Fees** tab.

- a Write down the patron's active balance.
- b Sort the list of fines by descending Creation Date.
- c Click the **Add Fine or Fee** button.
- d In the pop-up window, select **Other** as the fee type, enter a **Fee amount**, enter a barcode, if desired, and enter a **Note** indicating this is a test transaction.

The screenshot shows a pop-up window titled "Add Fine or Fee". It contains the following fields and controls:

- Operator Name:** A text field with the value "Documentation Team".
- Fee Type:** A dropdown menu with "Other" selected.
- Fee Amount:** A text field with "10.00" and a "USD" currency selector.
- Item Barcode:** A text field with "98694" and icons for clearing, list, and refresh.
- Comment:** A text area with the text "This is a test,".
- Buttons:** "Add", "Close", and "Add and Close" at the bottom right.

- e Click **Add and Close**.

The patron's **Active Balance** should be **incremented** by the amount of the fee you just entered, the fee should appear at the top of the list of fines/fees with a fine/fee type of **Other**, and the **Remaining Balance** for this fine/fee should equal the amount you entered.

2 Waive a fine/fee.

Open the same patron record to which you just added the fine/fee, then open the **Fines and Fees** tab.

- a Identify the fine/fee you just entered in the list.
- b Select **Waive** from the row actions list.
- c On the Waiving Fine/Fee page, select **Other** as the waiving reason, and add a note indicating this is a test transaction.

The screenshot shows a web form titled "Waiving Fine/Fee". At the top right are "Cancel" and "Waive" buttons. Below the title is a summary bar: "You are about to waive the following fine". The form fields are: "Operator name" with value "Team, Documentation"; "Fine/Fee type" with value "Other"; "Fee amount" with a text input "10.00" and a currency selector "USD"; "Waiving Reason" with a dropdown menu showing "Faculty"; and "Comment" with a text area containing "Test transaction".

- d Click the **Waive** button.
- e Click the **Confirm** button in the confirmation box.

The screenshot shows a confirmation dialog box titled "Waive Confirmation". The main text inside says "You are about to waive 10.00 USD. Do you confirm?". At the bottom right are "Cancel" and "Confirm" buttons.

The patron's **Active Balance** should be **decremented** by the amount of the fee you just waived, the status of the fine/fee should be **Closed**, and the Remaining Balance for the fine/fee should be **0.00**. Note that you may need to change the Status filter for the list to All or Closed in order to view the transaction, since it will be removed from the list of active transactions.

7

Circulation Relationships

Definitions

- **Circulate For** relationships determine whether a library can check out and check in items owned by another library. Note that check in only relationships are not supported in Alma.
- **Deliver To** relationships determine whether a library's items can be sent to another library for pickup by a patron – that is, whether other libraries will appear in the list of possible pickup locations when a request for a physical item is created by, or on behalf of, a patron. Note that fulfillment unit definitions also affect which pickup locations are actually available for a request.

Notes

- By default, all Alma libraries can circulate for, and deliver to, all other Alma libraries.
- Exceptions to the default may be based on configuration information provided by your institution or on data from the source system if the conversion programs can interpret this data.

Reviewing Circulation Relationships

Verify the accuracy of the **Deliver to** and **Circulate for** values for each library that has a circulation desk.

Testing Basic Circulation Relationships Functionality

- 1 Check out an item from a library other than the one whose circulation desk you are **Currently at**.

Identify a patron to whom you will check out the item. Make sure he or she has a patron role with a relevant Scope, an Active status, and an Expiration Date that has not passed. Write down the patron's ID.

- a Identify an item to be checked out. It should be a circulating item with a regular loan period (not short term) that is not already on loan. Write down the item barcode and note the library to which the item belongs.
 - b Log on as a user who has a Circulation Desk Operator role for a library that is **not** the Library that owns the item, but that should have a **Circulate for** relationship with the owning library. If necessary, change your **Currently at** value to the correct desk.
 - c Check out the item. The item should appear in the list of loans for this session.
- 2 Check in an item owned by a library other than the one whose circulation desk you are **Currently at**. While logged in as a Circulation Desk Operator currently at a circulation desk in a library that does **not** own the item you just checked out, but that should have a **Circulate for** relationship with the owning library, check in the item.
 - 3 Place a hold request for an item, and select a pickup location other than the library that owns the item.

Note: If you allow requesting only for items that are not currently available (e.g. on loan), ensure that your test item is not currently available.

Identify a patron for whom you will place a hold request. Make sure that he or she has a patron role with a relevant Scope, an Active status, and an Expiration Date that has not passed. Write down the patron's ID.

- a Search for a title to request. This should be a physical title that is held in only one library.

The screenshot shows a library catalog record for the book "Funny money : in search of alternative cash / David Boyle." The record includes the following details:

- Title:** Funny money : in search of alternative cash / David Boyle.
- Book (Book - Physical):** By Boyle, David, (London : HarperCollins 1999.)
- Subject:** Local exchange trading systems. Money. Barter. and others
- Language:** English
- ISBN:** 0002559471 (hbk)
- Record number:** 12406850

Below the record details, there are tabs for "Physical (1)", "Electronic", "Digital", and "Other details". The "Physical (1)" tab is selected, showing "1 Holding | 1 out of 1 items are available".

Library	Location	Call Number	Accession Number	Item Availability	Related Record
GRAD	grad	HD3430 .B695 1999	-	1 out of 1 Available	-

At the bottom of the record, there are links for "Holdings" and "Items".

Note that this title is owned by the Grad Library.

- b Select **Request** from the row actions list. This opens the Create Request form.
- c Select the **Patron Physical Item Request** from the **Request type** drop-down list. The request form expands with relevant fields.

- d Enter the patron's ID, then select the patron's name from the list of suggestions.
- e Select a location from the **Pickup at** drop-down list.

Note: This title is held in the Grad Library. The rules for fulfillment that apply to this library determine which libraries are listed as possible pick-up locations. Choose one of them.

<

Create Request

Cancel

Submit

Funny money : in search of alternative cash /

InstitutionEx Libris University

Create Request

Request Type *Patron physical item request

Requester *Smith, Thomas

Note

Pickup At *Science Library

Override On Shelf Request Policy

Additional Request Attributes

Material Type

Date Needed By

Loan Period

- f Click **Submit**.

A confirmation message appears at the top of the page indicating that the request was successfully submitted.

8

Course Reading

In Alma, there are two kinds of Course Reading records: Course Records and Reading Lists.

Finding and Reviewing Course Records

- 1 To find course records, on the Alma main menu, go to **Fulfillment > Course Reserves > Courses**. The List of Courses page opens.

Note: You can filter the list by Department, Status, or Term.

You can sort the list by Course Code, Course Name, Processing Department, Start Date, or End Date (ascending or descending for all sorts).

You can search for a course using the Find box. Course Code and Course Name searches are possible. Alternatively, select All to search either. Note that some of the other search types listed in the drop-down list will not work because the data does not appear in migrated records.

Courses											
1 - 19 of 19											
Course Code											
Processing Department : All Status : All Term : All											
Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date	End Date	Term		
1	ANC-GRC1702	-	Ancient Greece	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/06	2017/06/16	Semester 2	...
2	ANC-MED1701	-	Medicine in Ancient Times	History	Main Library Course Reserves	Instructor1, Leganto	Active	2016/10/03	2017/02/17	Semester 1	...
3	ANC-MED1702	-	Medicine in Ancient Times (II)	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/27	2017/06/16	Semester 2	...
4	ANC-ROM1702	-	Ancient Rome	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/06	2017/06/16	Semester 2	...
5	ArtHist101	-	Art History 101		Main Library Course Reserves	-	Active	2015/01/01	2015/12/31	Spring, Winter	...

- 2 To view details for a course, click the course code link, or select **Edit** from the row actions list. The Course Information tab of the course record opens.

Manage Course Information [Cancel] [Save]

Ancient Greece ⓘ

Course Code: ANC-GRC1702	Course Name: Ancient Greece	Instructors: Instructor1, Leganto;
Section: -	Processing Department: Main Library Course Res...	Number of participants: 50

Course Information | **Instructors** | Notes

Code * **Section**

Name * ⓘ

Academic Department **Processing Department *** ⓘ ⋮

Terms list

Status ☐ Active ☒ Inactive

Start date ⓘ ⓘ **End date** ⓘ ⓘ

Number of participants **Weekly hours**

Year

Searchable IDs

- 3 Review data for a course record in the **Course Information** tab:
- **Code:** The course code. This value should be copied from the source system.
 - **Section:** If there are section numbers in the source system, the values should be converted to this field. Note that 00 is a valid value if it was used in the source data. Verify that a separate course record has been created in Alma for each section of the course.
 - **Name:** The course name. This value should be copied from the source system.
 - **Academic Department:** The academic department that offers the course.
 - **Processing Department:** This is the name of the library unit that manages courses and reading lists for this academic department. By default, this value is COURSE_UNIT.
 - **Terms list:** If values in the source system cannot be mapped easily to Alma values, this data may be written to a note.

- **Status:** If possible, explicit status values in the source system are mapped to Alma **Active** and **Inactive** values. Otherwise, if the end date for the course has passed, a status of **Inactive** is assigned. If it has not passed, a status of **Active** is assigned.
 - **Start date:** This value should be migrated from the source system.
 - **End date:** This value should be migrated from the source system.
 - **Number of participants:** If this value is present in the source system, it should be migrated to Alma.
 - **Weekly hours:** If this value is present in the source system, it should be migrated to Alma.
 - **Year:** If this value is present in the source system, it should be migrated to Alma.
- 4 Review data in the **Instructors** tab of the course record. In Alma, the instructor must be an Alma user. When it is not possible to match the instructor's name in the source system to an Alma user easily (usually because this is uncontrolled data in the source system), the instructor name is written to a note.
 - 5 Review data in the **Notes** tab of the course record.

Two kinds of notes may appear in this tab:

- Notes from note fields in the source system: These will be preceded by the label **Note:**. The value should be copied from the source system.
- Notes created during migration: These will be preceded by a label indicating what type of data is represented by the note. The value will be migrated from the source system.

Finding and Reviewing Reading Lists

- 1 To find reading lists:
 - a. On the Alma main menu, go to **Fulfillment > Course Reserves > Reading Lists**.

The Reading Lists Task List page opens with the Assigned to Me tab open.

Reading Lists Task List							
<div> Assigned to Me Unassigned Assigned to Others </div>							
1 - 1 of 1 All <input type="text"/> <input type="button" value="Q"/> <input type="button" value="Share"/> <input type="button" value="Settings"/>							
Status: All Alerts: All Publication Status: Active							
Code ▲	Name ▲	Status ▲	Assignee	Owner/s	Due Back Date	Alerts	
1 0.8195019442510...	Medicine in Ancient Times (Semester II)	Ready For Processing	Team, Documentation	Instructor1, Leganto	-	✓	...

- b. Open the Unassigned tab, since most reading lists will be found there.

Reading Lists Task List

Assigned to Me Unassigned Assigned to Others

1 - 3 of 3 All

Status : All Alerts : All Publication Status : Active

	Code ▲	Name ▼	Status ▼	Assignee	Owner/s	Due Back Date	Alerts
1	0.6279714424319178	Medicine	Being Prepared	-	Team, Documentation	-	
2	0.7014474850890163	History	Being Prepared	-	Team, Documentation	2017/06/16	
3	CCRLList	CC Reading List	Being Prepared	-	-	2025/12/31	

Note: You can filter the list by Status or Alerts. However, for the purpose of review, it is best to retain the defaults of All/All.

You can sort the list by Code, Name, or Status (ascending or descending in all cases).

You can search for a reading list by entering a search term in the Find box.

2 Review reading list data:

- From the Reading Lists task list, click the code link or select **Work On** from the row actions list for a reading list. This opens the reading list record for editing.
- Review basic reading list data. Note that data in the header comes from the course record for which the reading list was created.

< Edit Reading List Print Slip Print Slip Report Back Save

CC Reading List i

Course Code: HIST215	Course Name: History of Modern Europe	Instructors: Wright, Julie	View in Leganto
Section: -	Processing Department: Graduate Library Course Re...	Number of participants: 100	

Reading List Information ▼

Code: * CCRLlist	Status: Being Prepared ▼
Name: * CC Reading List	🌐
Publication Status: Draft ▼	Due Back Date: 2025/12/31 ✕ 📅
Reading List Visible Start Date: 📅	End Date: 📅
Locked in Leganto: <input type="checkbox"/>	
Owners: -	

Citations Owners Notes

Actions Place Request + Add Citation Change Copyright Status Change Status

☐ Select All Alerts: All Citation/Locate Status: All Material Type: All Tags: All Copyright Status: All

📄
No records were found.

- **Code:** The reading list code may consist of the course code, RL, and a sequential number, with the segments of the code separated by hyphens or simply be based on the source system reading list code. This depends on your source system.
 - **Name:** The reading list name may consist of the course name, reading list, and a sequential number or simply be based on the source system reading list code. This depends on your source system.
 - **Status:** The status will be **Complete** in all cases.
 - Review citations for the reading list. Note that:
 - The **Citations** tab will be open by default when the reading list record is displayed.
 - You can filter the list of citations by Alert, Locate Status, or Type. However, for the purposes of review, retain the All/All/All defaults.
 - The display of bibliographic and availability data in the list is the same brief record display used in the records retrieved by a repository search.
- c. Verify that there is the same number of citations in the reading list in Alma and the source system. Bear in mind that there may be multiple reading lists for the same

course. If citations come from multiple sources, ensure that citations from all sources are represented in the converted data.

- d. Verify that the same citations are included in the reading list in Alma and the source system.

- **Citation status** will always be **Complete** in migrated records.
- **Resource locate status** will always be **Resource Located** in migrated records.

- 3 Open the **Notes** tab just above the citation list to review notes.

Notes in converted records may relate to the course, rather than the reading list. In this case, they should match the notes in the course record.

Testing Basic Course Reading Functionality

- 1 Create a course.

- a Open the list of courses (**Fulfillment > Course Reserves > Courses**), then click the **Add Course** button.

The Course Information tab opens.

- b. Fill in all required values for the course, as well as any optional values you wish to enter. For a new course (created in Alma, not migrated), the Processing Department must be selected. Note that the **Processing department** will be converted to **COURSE_UNIT**.

Manage Course Information

Cancel

Save

Course Information

Instructors

Code *

ART-CULT

Section

Name *

20th Century Politics and Art

Academic Department

Processing Department *

Main Library Course Reserves

Terms list

Autumn
Early Autumn
Semester 1
Semester 2

Status

☐ Active
☒ Inactive

Start date

2017/09/13

End date

2017/12/18

Number of participants

35

Weekly hours

0

Year

Searchable IDs

c. Click **Save**.

The new course should appear in the list of courses.

Courses

Back

1 - 20 of 20

Course Code

Add Course

Processing Department : All
Status : All
Term : All

	Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date	End Date	Term	
1	ANC-GRC1702	-	Ancient Greece	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/06	2017/06/16	Semester 2	
2	ANC-MED1701	-	Medicine in Ancient Times	History	Main Library Course Reserves	Instructor1, Leganto	Active	2016/10/03	2018/02/17	Semester 1	
3	ANC-MED1702	-	Medicine in Ancient Times (II)	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/27	2017/06/16	Semester 2	
4	ANC-ROM1702	-	Ancient Rome	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/06	2017/06/16	Semester 2	
5	ART-CULT	-	20th Century Politics and Art		Main Library Course Reserves	-	Active	2017/09/13	2017/12/18	Autumn	

- 2 Create a **reading list** to go with the course you just created.
 - a Open the list of courses.
 - b Select **Reading List** from the row actions list for the course you created. This opens the following page.

- c Click **Add Reading List**.
- d In the Add Reading List pop-up window, enter the **Reading list code** and **Name**.
- e Follow the same conventions for structuring this data as were used in migrated data.

Note: The end date for the course is automatically copied to the **Due back date** field.

- f Click **Add and Close**. You will be returned to the page where you started, with the reading list now listed. The status for the list will be **Being Prepared**.

3 Add citations to the reading list you just created.

a Open the Edit Reading List page for the reading list by clicking the code link.

Edit Reading List

Print Slip | Print Slip Report | Back | Save

20th Century Politics and Art

Course Code: ART-CULT | Course Name: 20th Century Politics and Art | Instructors: - | View in Leganto
Section: - | Processing Department: Main Library Course Reserv... | Number of participants: 35

Reading List Information

Code: * ART-CULT | Status: Being Prepared
Name: * 20th Century Politics and Art
Publication Status: Draft | Due Back Date: 2017/12/18
Reading List Visible Start Date: | End Date: |
Locked in Leganto: ☐
Owners: -

Citations | Owners | Notes

Actions | Place Request | Add Citation | Change Copyright Status | Change Status

Select All | Alerts: All | Citation/Locate Status: All | Material Type: All | Tags: All | Copyright Status: All

No records were found.

b Click the **Add Citation** button, then the **Add Repository Citation** action. This opens the Repository Search page. Enter a search.

All titles | Keywords | Search | Advanced

Repository Search | Cancel | Select


0 rows selected

No search has been performed yet.

For more information on the search box, see [Searching in Alma](#) in the Customer Knowledge Center.

b. In the results list, select the check boxes for two titles.

All Titles
baseball
Cancel
Select

7
☒


Baseball : an illustrated history / narrative by Geoffrey C. Ward ; based on a documentary filmscript by Geoffrey C. Ward and Ken Burns ; preface by Ken Burns and Lynn Novick ; with an introduction by Roger Angell ; contributions by John Thorn ... [et al.].

Book (Book - Physical) By Ward, Geoffrey C. (New York : AA Knopf c1994.)

Subject: Baseball--United States--History--Pictorial works. Baseball--United States--History.


Edition: 1st ed.

Physical (1)
Electronic
Digital
Other details

Language: English

ISBN: 0679404597 :

Record number: ocm29218866

8
☒


Baseball play and strategy / Ethan Allen.

Book (Book - Physical) By Allen, Ethan, (Malabar, Fla. : RE Krieger Pub Co 1982.)

Subject: Baseball. Baseball--Coaching.

Edition: 3rd ed.

Physical (1)
Electronic
Digital
Other details

Language: English

ISBN: 0898744504

Record number: ocm07875847 830325

- c. Click the **Select** button at the top or bottom right of the page. The titles you selected are added to the reading list.
- d. Click the **Add Citation** button, then the **Add Brief** action. This option adds the record to the repository.
- e. In the pop-up window, select **Book** from the **Citation Type** drop-down list, then click **Choose**.

The Quick Cataloging data entry page opens.

< Quick Cataloging
Cancel Save

Resource Information

Title * Political Art

Author

Author initials

Edition

ISBN

LCCN

OCLC number

Other standard ID

Barcode

Remote record ID

Publisher

Publication date

Place of publication

Additional person name

Source

Series title number

Call number

Note

Volume

Part

Chapter

Pages

Start Page

End Page

Record format

MARC21 Bibliographic

Course Restricted

Suppress from Discovery

Citation Parameters

Copyright Status

Not Determined

Material Type

Book

Item Information

Location * Building 9

Barcode

Material Type

Book

Item policy

Two Day Loan

Public note

- f. Enter **Resource Information**. A title is required. Enter any additional information.
- g. Add **Item Information**. Initially, only the **Library** field is editable.

- h. Type all or part of the library name in the box, then select a value from the list of options presented. Alternatively, click the arrow to the right of the box, and select a library from the resulting list.
 - i. Enter other item information. Once you have selected a library, **Location**, **Barcode**, **Material type**, and **Item policy** can be entered.
 - j. Click **Save**. The citation is added to the reading list.
- 4 Change the status of the citations.
- a Select the check box for each citation, or click **Select All** at the top of the list of citations.

At the top of the Citations section, click **Change Status**, then select **Complete** from the drop-down list. Click the **Change Status** button.

The screenshot shows the 'Citations' tab in a software interface. At the top, there are tabs for 'Citations', 'Owners', and 'Notes'. Below these are filters for 'Alerts', 'Citation/Locate Status', 'Material Type', 'Tags', and 'Copyright Status'. A 'Change Status' dropdown menu is open, showing options: 'Being Prepared', 'Complete', 'Declined', 'In Process', 'Inactive', and 'Ready For Processing'. The first citation, 'Get the message? : a decade of art for social change / Lucy R. Lippard.', is selected. Its details include 'Request Status: Being Prepared', 'Resource Locate Status: Resource Located', and 'Copyright Status: Not Determined'. The second citation, 'The Politics of Art', is also visible with similar details.

The citation's **Request Status** changes to **Complete** for each of the citations.

This screenshot shows the same 'Citations' interface after the status change. Both citations now have 'Request Status: Complete' highlighted in a red box. The first citation, 'Get the message? : a decade of art for social change / Lucy R. Lippard.', now has 'Request Status: Complete', 'Resource Locate Status: Resource Located', and 'Copyright Status: Not Determined'. The second citation, 'The Politics of Art', also has 'Request Status: Complete', 'Resource Locate Status: Resource Located', and 'Copyright Status: Not Determined'. The 'Change Status' dropdown menu is no longer open.

- 5 Change the status of the reading list.

- a In the **Reading List Information** section of the record, change the Status of the list to **Complete**.

The screenshot shows the 'Edit Reading List' interface. At the top, there's a header with a back arrow, the title 'Edit Reading List', and buttons for 'Print Slip', 'Print Slip Report', 'Back', and 'Save'. Below this is a section for '20th Century Politics and Art' with a blue information icon. This section contains course details: Course Code (ART-CULT), Course Name (20th Century Politics and Art), Instructors (-), Processing Department (Main Library Course Reserv...), and Number of participants (35). A link 'View in Leganto' is also present. Below this is the 'Reading List Information' section, which is expanded. It contains two fields: 'Code: *' with the value 'ART-CULT' and 'Name: *' with the value '20th Century Politics and Art'. A 'Status:' dropdown menu is highlighted with a red box, showing 'Complete' as the selected option.

- b. Click **Save**. The changed status is reflected in the list of readings lists.
- 6 Remove a citation from the list.
- a Open the reading list for editing by clicking on the reading list's **Code** link.
- b. Select the check boxes for the citations you want to remove and select the **Remove Citations** action from the table actions list.
- c. Click **Confirm** in the pop-up window.

The screenshot shows a 'Confirmation Message' pop-up window. It has a title bar 'Confirmation Message' and a main text area that says 'Are you sure you want to delete the selected citations?'. At the bottom right, there are two buttons: 'Cancel' and 'Confirm'.

The citation is removed from the reading list.