



## Testing Resource Management 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 resource management data that has been migrated to Alma from your current system. It is also designed to provide a review of basic Alma functionality. The data 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 customer feedback. We strongly recommend that you test data according to the guidelines below. However, we encourage you to go beyond these guidelines, especially if your migration included special or unusual requests, or if you have identified particular data 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 functionality

## The Resource Management Data to Review in Alma

Review the following resource management data in Alma:

### *Bibliographic Records*

The resource data in Alma, whether for physical, electronic, or digital inventory, has a hierarchical structure. At the top of the hierarchy is the bibliographic record. The bibliographic record may or may not have inventory records attached to it. Physical, electronic, and digital inventory records may all be linked to the same bibliographic record.

The bibliographic metadata from your source system is migrated as is. The migration routines do not check the validity (for example, according to MARC21) of the migrated data. Additional

fields may be added to the migrated bibliographic metadata, for example alphabetic or alphanumeric fields, depending in part on the answers in your migration form.

### ***Holdings Records***

Holdings records are the second level of the data hierarchy for physical resources. A holdings record contains library, location, and call number data. A holdings record is always linked to a single bibliographic record, although multiple holdings records may be linked to the same bibliographic record.

### ***Item Records***

Item records are the third and final level of the data hierarchy for physical resources. An item record contains information specific to a particular copy, for example, barcode, item policy, copy number, etc. An item record must be linked to a single holdings record, although multiple item records may be linked to the same holdings record.

### ***Electronic Portfolio Records***

Electronic portfolio records are the second level of the data hierarchy for electronic resources. An electronic portfolio record contains linking, coverage (years, volumes, issues) service (full text, abstract, etc.) availability, and accessibility information. An electronic portfolio record is always linked to a bibliographic record. An electronic portfolio may be local or linked to the Alma Community Zone (CZ). An electronic portfolio may be part of an electronic collection (=package), in which case it is linked to an electronic collection record (in addition to being linked to its own title-specific bibliographic record), or not (in which case it is referred to as a standalone portfolio).

Electronic portfolios are migrated from your source system based on your link resolver migration and your P2E form in your ILS migration. Resources listed in your P2E form as being of type portfolio are migrated to Alma as standalone local portfolios. You may want to link some of these to the CZ or to a local collection after migration. Consult with your implementation team.

### ***Electronic Collection Records***

Records that you mark in your P2E form as **Database** or **Package** are migrated to Alma as electronic collection records. An electronic collection record may contain a URL (for database-type collections) or be linked to portfolio records (for package-type collections). The electronic collection record may be linked to a bibliographic record, although this is not necessary. If your electronic portfolios were linked to the CZ as part of the migration process, they may be linked to a CZ collection record. Note that the migration routine does not attempt to link local (non-CZ) electronic portfolios to local (non-CZ) electronic collections. You can, however, create these links afterwards in Alma.

## ***Digital Representation Records and Files***

If you have digital resources and these are included in your project's migration scope, these were migrated as digital representation records and files. Digital representation records are the second level of the data hierarchy for digital resources and by necessity are linked to a single bibliographic record, although multiple representations may be linked to a given bibliographic record. Digital representation records are the container for digital files and contain information regarding the digital files linked to them: the usage type (master or derivative) owning library, and access rights. Digital files (pdf, jpg, etc.) are by necessity attached to a single representation record, although multiple files may be linked to a given representation.

---

### **Notes:**

- The Alma interface is undergoing continuous updates so that your interface may differ from the screenshots in this guide.
  - This document assumes that you are familiar with Alma Resource Management. For more information concerning Alma Resource Management, refer to the [Resource Management](#) section in the Alma online help and [Electronic Resource Handling in Alma Migration](#).
-

# 2

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## Bibliographic Records

### Finding and Reviewing Bibliographic Records

---

**Note:** Indexes in the source system and Alma may not match, since a single set of indexes is defined for all Alma users.

---

Enter a search term into the persistent search box that appears at the top of every page in Alma to do a keyword search of All Titles.

|              |            |  |   |
|--------------|------------|--|---|
| All titles ▼ | Keywords ▼ |  | Q |
|--------------|------------|--|---|

For some tasks, it is useful to look at a variety of records retrieved using a general search. For example:

|              |            |                    |
|--------------|------------|--------------------|
| All titles ▼ | Keywords ▼ | English Literature |
|--------------|------------|--------------------|

In other cases, you may want to review a single record that has specific characteristics. In this case, you can use the ID from the source system to search for the record. Note that the ID of the source library and (optionally) the source system is added to the Originating system ID field in the migrated record. The exact format is specified in the migration options your institution chose.

|              |            |                       |
|--------------|------------|-----------------------|
| All titles ▼ | Keywords ▼ | (Aleph)001337011UXY01 |
|--------------|------------|-----------------------|

After you have entered a search term, click the magnifying glass, or press **Enter**.

The result of your search is a list of brief records that fulfill your search criteria. At the left side of the page is a list of facets that allow you to refine your search results.

Ex Libris Alma Sandbox

★ Acquisitions Resources Fulfillment Admin Analytics

All titles Keywords English Literature

Sort by Rank

Material Type
 

- Book (919)
- Journal (94)
- Music (2)
- Visual material (3)

Resource Type
 

- Book - Electronic (3)
- Book - Physical (915)
- Journal - Electronic (9)
- More (6)

Language
 

- .b (1)
- Afrikaans (1)
- Chinese (2)
- More (29)

Publication Year

All Titles (1 - 20 of 1,018) English Literature

Institution Community

Expand

- English literature / by Stopford Brooke.**

Book (Book - Physical) By Brooke, Stopford Augustus, (Grossett & Dunlap 1909, c1900.)

Language: English

Record number: CNV01353050

Physical (1) Electronic Digital Other details

Edit Record Holdings
- English literature / by John Calvin Metcalf.**

Book (Book - Physical) By Metcalf, John Calvin, (Richmond, Atlanta [etc.] : Johnson publishing company 1918, [c1912].)

Language: English

Record number: CNV01353048

Physical (1) Electronic Digital Other details

Edit Record Holdings
- English literature / [by] Ruth Mary Weeks ... Rollo L. Lyman ... [and] Howard C. Hill ..**

Book (Book - Physical) By Weeks, Ruth Mary, (New York : C ...

Language: English

Edit Record Holdings

There are two useful ways to review bibliographic records:

- Click the title link for a simple view of the MARC record. This is useful for reviewing most converted bibliographic data. Pay particular attention to fields that are created or modified during migration:
  - The **Suppress from publishing** flag.
  - The **035** field that is created from the source system ID
  - Nonstandard tags that have been converted to 9XX tags (none in this example)



Record View

English literature / By Stopford Brooke.

MMS ID 991065470000541

Brief level 01

Originating system ILS

Suppress from publishing No

Record format marc21

Originating system 16759-train20072\_c2db

Export to WorldCat Don't publish

Export to Libraries No

Originating system - version

LDR 00552cam a2200181a 4500

001 16759

008 770202c19091900nyu 000 0 eng

035 \_\_ la CNV01353050

035 \_\_ la (TrN)16759-train20072\_c2db

040 \_\_ la DLC lc TOL jd m.c. jd PIT jd NBC

049 \_\_ la SHCM

050 0\_ la PR85 j3 .B7 1900a

092 \_\_ la 820.9 B79

- Open the record in the Metadata Editor by clicking **Edit** Record to the right of the record in the search results, or the **Edit** button in the MARC Record Simple View.

This is a good place to check the migration of fixed field data. To do so, click the fixed field you want to review.

MD Editor

You have 4 warning(s) in your record

Working on -English literature / (991065470000541) , Created by import (18/12/2011 06:35:42 AEDT)

LDR 00552cam#a2200181a#4500

001 16759

008 770202c19091900nyu#####000#0#eng

035 \$\$a CNV01353050

035 \$\$a (TrN)16759-train20072\_c2db

040 \$\$a DLC \$\$c TOL \$\$d m.c. \$\$d PIT \$\$d NBC

Now press **CTRL F**. A form opens, enabling you to easily review and edit the individual data elements:

The MD Editor interface shows a record form for 'Literat... (991065470000541)'. A yellow banner at the top states 'You have 4 warning(s) in your record'. The form is titled 'Working on -English literature / (991065470000541), Created by import (18/12/2011 06:35:42 AEDT)'. The form contains several fields with dropdown menus and text inputs, including Logical record length (0-4), Record status(5), Type of record(6), Bibliographic level(7), Type of control(8), Character coding scheme(9), Indicator count(10), Subfield code count(11), Base address of data (12-16), Encoding level(17), Descriptive cataloging form(18), Multipart resource record level(19), Length of the length-of-field portion(20), Length of the starting-character-position portion (21), and Length of the implementation-defined portion (22).

To exit the form, press **Esc** (Escape).

You may also find it useful to review the **Alerts** that appear at the bottom of the screen. (Ensure that you first save your work by selecting **File > Save Draft** or by clicking the Save Record icon in the menu bar.)

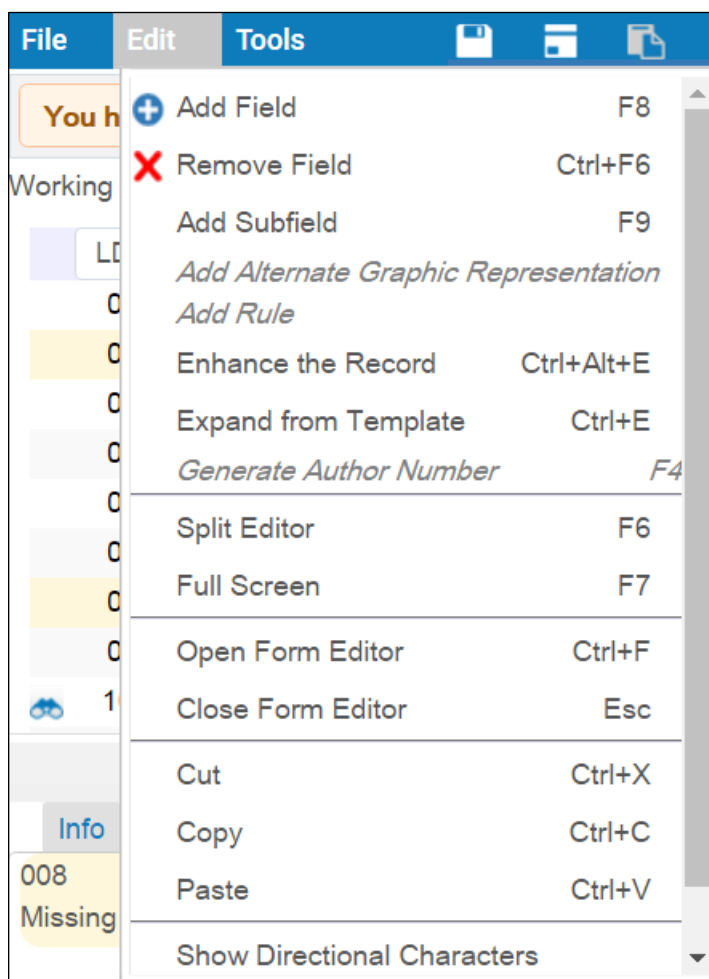
The MD Editor interface shows a record form for 'Literat... (991065470000541)'. A yellow banner at the top states 'You have 4 warning(s) in your record'. The form is titled 'Working on -English literature / (991065470000541), Created by import (18/12/2011 06:35:42 AEDT)'. The form contains several fields with dropdown menus and text inputs, including Logical record length (0-4), Record status(5), Type of record(6), Bibliographic level(7), Type of control(8), Character coding scheme(9), Indicator count(10), Subfield code count(11), Base address of data (12-16), Encoding level(17), Descriptive cataloging form(18), Multipart resource record level(19), Length of the length-of-field portion(20), Length of the starting-character-position portion (21), and Length of the implementation-defined portion (22). Below the form, there is an 'Alerts' section with a red border, listing four warnings: 'Missing data for position 38 in field 008', 'Missing data for position 39 in field 008', '"#" is not a valid code for Second indicator for field 050', and 'Field "OWN" is not listed in profile'.

Note that errors (in red) must be corrected before the record can be saved and warnings (in yellow) are for your information and possible correction.

# Testing Basic Bibliographic Record Editing Functionality

To test basic bibliographic record editing functionality:

- 1 Add a field.
  - a Open a MARC21 bibliographic record in the Metadata Editor.
  - b Click the field above where you want to add a field.
  - c Select **Edit > Add Field** or press **F8**.



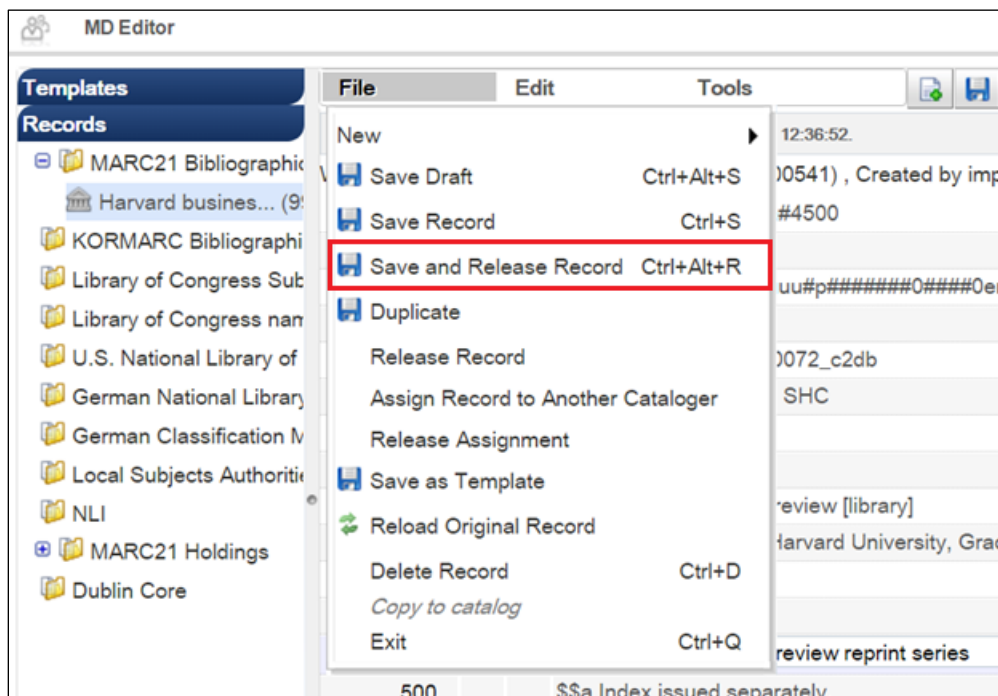
A new field opens:

|     |   |   |   |
|-----|---|---|---|
| 245 | 0 | 0 | \$\$a Harvard business review [library]   |
| 260 |   |   | \$\$a [Boston, etc. \$\$b Harvard University, Graduate School of Business Administration] |
| 300 |   |   | \$\$a v. : \$\$c 28 cm.   |
| 362 | 0 |   | \$\$a [no.] 1.011-  |
|     |   |   | \$\$a   |

- d Enter a tag, indicators, subfields, and data.

|     |   |   |   |
|-----|---|---|---|
| 245 | 0 | 0 | \$\$a Harvard business review [library]   |
| 260 |   |   | \$\$a [Boston, etc. \$\$b Harvard University, Graduate School of Business Administration] |
| 300 |   |   | \$\$a v. : \$\$c 28 cm.   |
| 362 | 0 |   | \$\$a [no.] 1.011-  |
| 440 |   | 0 | \$\$a Harvard business review reprint series  |

- e Select **File > Save and Release Record** or press **Ctrl+Alt+R**.



- f Search for the record, open it in the Metadata Editor, and ensure that the field you added is present.

## 2 Edit a field.

- a Open the record in the Metadata Editor.
- b Click the field you want to modify (such as 1XX, 245, or 260) and make your changes.



## Finding and Reviewing Electronic Titles

Electronic titles are simply bibliographic records that have electronic portfolios attached to them. These can be journals or e-books. To find electronic titles, perform a repository search for electronic titles:

A screenshot of a search interface. It features a blue button labeled 'Electronic titles' with a downward arrow, followed by a grey button labeled 'Keywords' with a downward arrow. To the right is a search input field containing the text 'health', and a blue search button with a magnifying glass icon.

In addition to reviewing bibliographic data for these titles as above, pay particular attention to the following:

- Are the titles you retrieved by limiting your search to electronic titles actually electronic titles?
- Are all relevant electronic titles included in the results of a search limited to electronic titles?

Verify that the P to E conversion was successful. Search in Alma for each bibliographic record of a physical resource in your source ILS from the list you provided to Ex Libris, and confirm that it has been converted to an electronic resource. You can search by originating system ID.

# 3

## Holdings Records

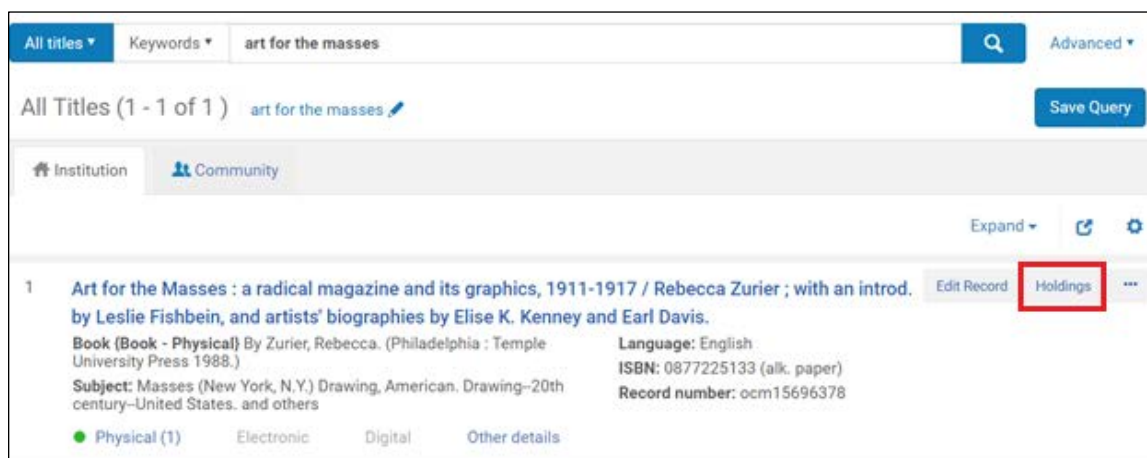
### Finding and Reviewing Holdings Records

#### Finding Holdings Records

**Note:** Only bibliographic records for physical materials should have associated holdings records. However, some copies associated with a single bibliographic record may be physical, whereas others may be electronic.

There are two ways in which you can locate and view holdings records:

- 1 From a brief display of bibliographic records:
  - a Click the **Holdings** link in the record.



This opens a list of the holdings records associated with the bibliographic record.

← List of Holdings Back

 Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]

1 - 1 of 1

Filter: All ▾

|                            | ID                     | Library      | Location | Call Number     | Copy Id | Access Number | No. of Items | Available | PO Line |
|----------------------------|------------------------|--------------|----------|-----------------|---------|---------------|--------------|-----------|---------|
| 1 <input type="checkbox"/> | <b>224813090000541</b> | Main Library | Stacks   | NC108 .Z87 1988 | -       | -             | 1            | 1         | -       |

- b Click a link in the **ID** column to open a Record View of the holdings record:

← Record View Edit Back Relink


Art for the Masses : a radical magazine and its graphics, 1911-1917 /

|        |                 |             |    |               |                |
|--------|-----------------|-------------|----|---------------|----------------|
| MMS ID | 224813090000541 | Brief level | 01 | Record format | marc21_holding |
|--------|-----------------|-------------|----|---------------|----------------|



|     |  |
|-----|--|
| LDR | 00203cx a22000973 4500                   |
| 001 | 37106                                    |
| 004 | 36484                                    |
| 005 | 19970115160703.0                         |
| 008 | 9701150p 8 4001aueng0000000              |
| 014 | 1_  a ocm15696378                        |
| 852 | 0_  b MAIN  c main  h NC108  i .Z87 1988 |

Alternatively, select **Edit** from the row actions by right-clicking anywhere in the record in the List of Holdings. This opens the record in the Metadata Editor:

File Edit Tools 

You have 1 warning(s) in your record

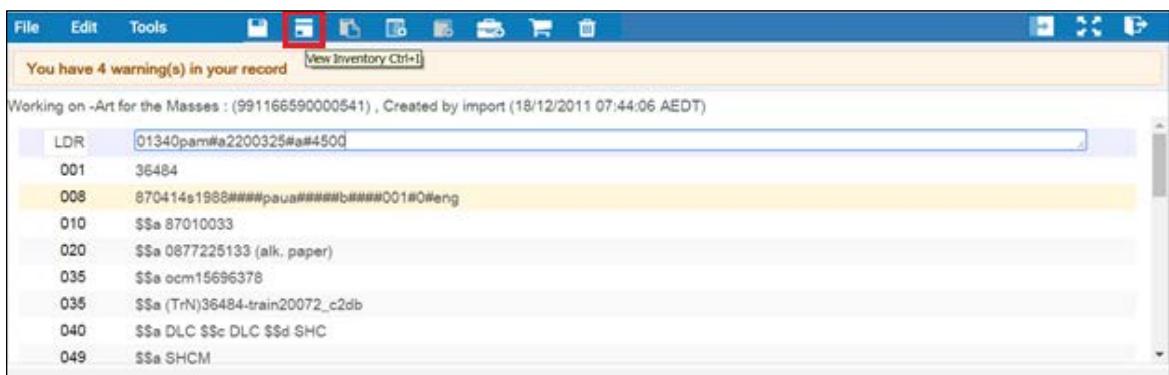
Working on -Art for the Masses : (224813090000541) , Created by import (18/12/2011 07:44:06 AEDT)

|       |   |
|-------|---|
| LDR   | 00203cx##a22000973##4500                          |
| 001   | 37106   |
| 004   | 36484   |
| 005   | 19970115160703.0                                  |
| 008   | 9701150p####8###4001aueng0000000                  |
| 014 1 | \$\$a ocm15696378                                 |
| 852 0 | \$\$b MAIN \$\$c main \$\$h NC108 \$\$i .Z87 1988 |

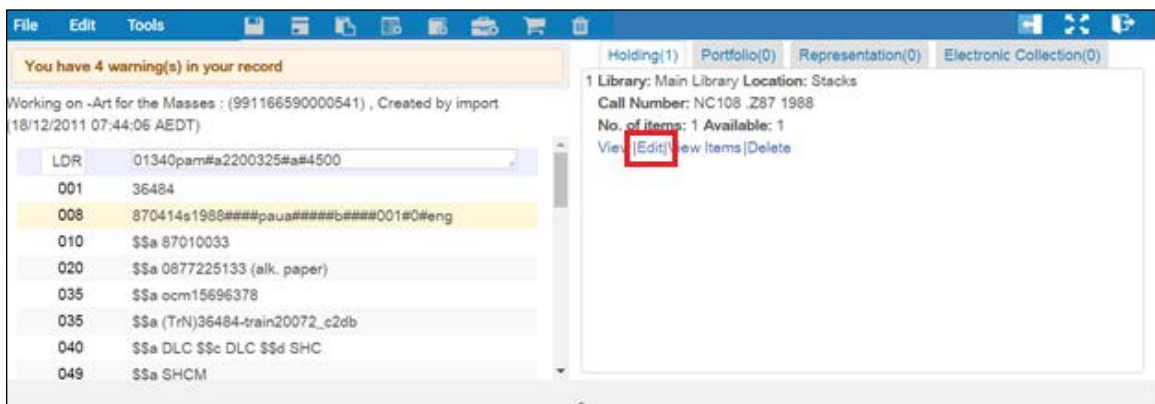
- 2 Open a bibliographic record in the Metadata Editor:

- a Click the **View Inventory** icon at the top of the page.

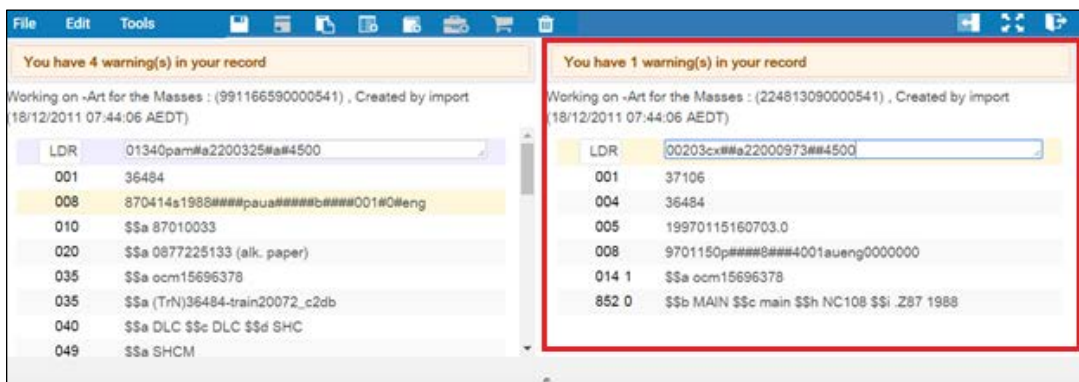




This opens a brief display of the holdings records associated with the bibliographic record in split screen mode.



- b Click **Edit** beneath the brief holdings record. This opens the record in the Metadata Editor.



## Reviewing Holdings Records

If your institution uses MARC holdings records:

- Ensure that all data has been migrated without modification.
  - General review is most easily performed using the Record View.

- More detailed review, especially review of fixed fields, is best performed using the Metadata Editor.
  - Ensure that holdings records are linked to the correct bibliographic record.
- If your institution has not used MARC holdings records, minimal MARC holdings records will be created from item records associated with a bibliographic record. One holdings record will be created for each unique combination of **Library**, **Location**, and **Call number**. **Library** and **Location** codes will be in 852 \$\$b and \$\$c respectively, and **Call number** typically will be in 852 \$\$h and \$\$i.
- Ensure that the correct number of holdings records has been created and that items are grouped under the holdings indicated in the source data and migration mapping inputs.
  - Ensure that data within each holdings record is correct. Use the Record View or the Metadata Editor, as appropriate.
  - For holdings records linked to a continuous order, such as a subscription, verify that the PO line appears in the correct holdings record. This is not displayed in the Metadata editor, rather in the List of Holdings.

## Testing Basic Holdings Record Editing Functionality

To test basic holdings record editing functionality:

- 1 Add a field.
  - a Open a holdings record in the Metadata Editor.
  - b Click the field below where you want to add a field.
  - c Select **Edit > Add Field** or press **F8**.
  - d Enter a tag, indicators, and data.
  - e Select **File > Save and Release Record** or press **Ctrl+Alt+R**.
  - f Open the record again in the Metadata Editor to ensure that the field you added is present.
- 2 Edit a field.
  - a Open a holdings record in the Metadata Editor.
  - b Click the field you want to edit.
  - c Make a change in 852 \$\$h.
  - d Select **File > Save and Release Record (Ctrl+Alt+R)**.



# 4

## Item Records

### Finding and Reviewing Item Records

#### Finding Item Records

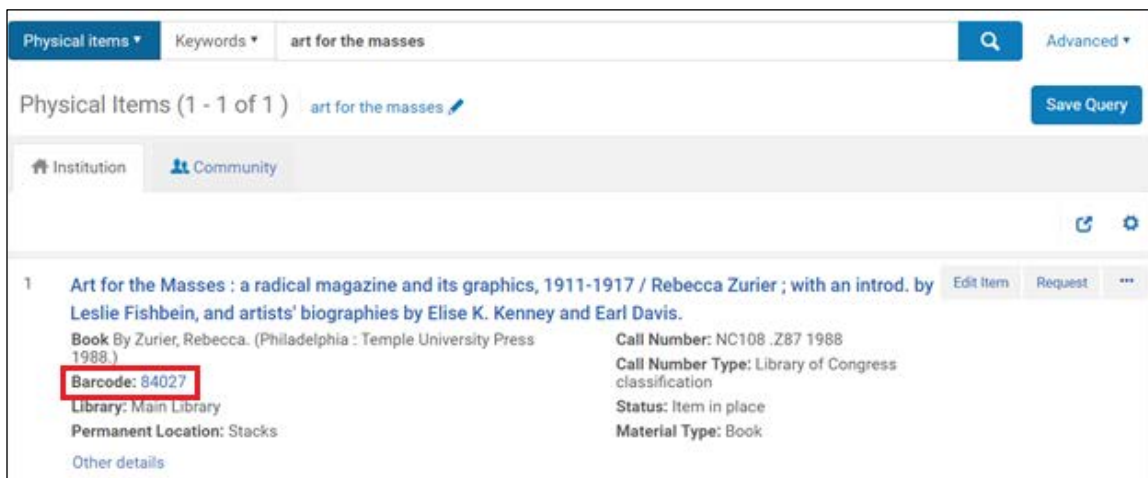
Item records are created only for physical materials.

There are three ways in which you can find item records:

- 1 Perform a physical items search.
  - Select **Physical items** from the drop-down list to the left of the persistent search box, enter a value in the box, and click the magnifying glass icon or press **Enter**. If you want to retrieve a single item, a barcode search is most efficient. If you want to retrieve a set of records, do a more general keyword search.



The search yields brief records, one for each item.



Physical items ▾ Keywords ▾ art for the masses 🔍 Advanced ▾

Physical Items (1 - 1 of 1) art for the masses ✎ Save Query

🏠 Institution 👤 Community

1 **Art for the Masses : a radical magazine and its graphics, 1911-1917 / Rebecca Zurier ; with an introd. by Leslie Fishbein, and artists' biographies by Elise K. Kenney and Earl Davis.** Edit Item Request ⋮

Book By Zurier, Rebecca. (Philadelphia : Temple University Press 1988.)

**Barcode: 84027**

Library: Main Library

Permanent Location: Stacks

Other details

Call Number: NC108 .Z87 1988


Call Number Type: Library of Congress classification

Status: Item in place

Material Type: Book

Click the **barcode** link to display the individual record in the Physical Item Editor.

Physical Item Editor
Cancel
Save


**Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]**

|                     |                                       |                    |                 |                                      |
|---------------------|---------------------------------------|--------------------|-----------------|--------------------------------------|
| <b>Holding</b>      | Main Library: Stacks; NC108 .Z87 1988 | <b>Holdings ID</b> | 224813090000541 | <a href="#">View all holdings</a>    |
| <b>Barcode</b>      | 84027                                 | <b>Item ID</b>     | 234813080000541 | <a href="#">View all items</a>       |
| <b>Process type</b> | -                                     | <b>Status</b>      | Item in place   | <a href="#">Browse shelf listing</a> |

General Information
ENUM/CHRON Information
Notes
History

|                  |   |          |                         |                                 |
|------------------|---|----------|-------------------------|---------------------------------|
| Barcode          | <input type="text" value="84027"/>              | Generate | Copy ID                 | <input type="text" value="0"/>  |
| Material type    | <input type="text" value="Book"/>               |          | Item policy             | <input type="text"/>            |
| Provenance       | <input type="text"/>                            |          | 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 |                      |

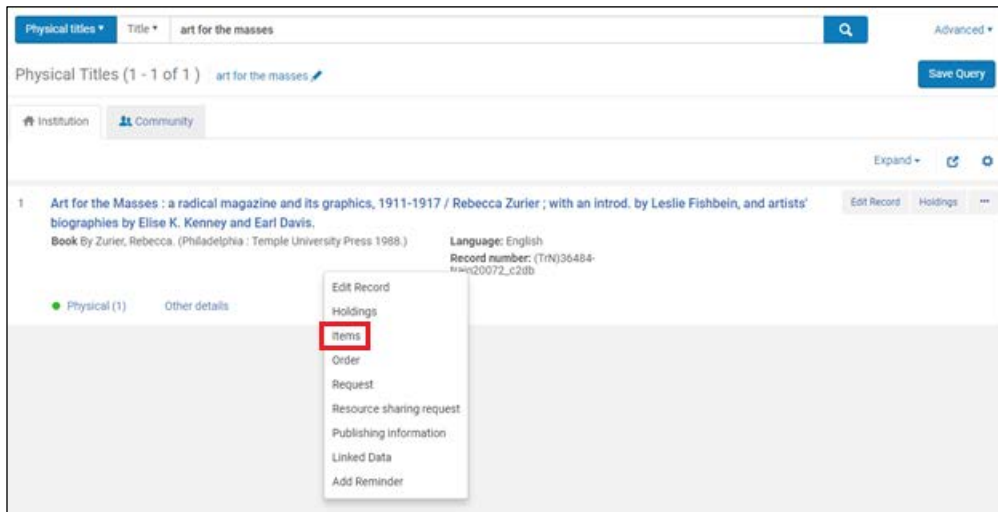
Location Information

|                              |                      |                         |                      |
|------------------------------|----------------------|-------------------------|----------------------|
| Permanent library *          | Main Library         | Permanent location *    | 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"/> |                         |                      |

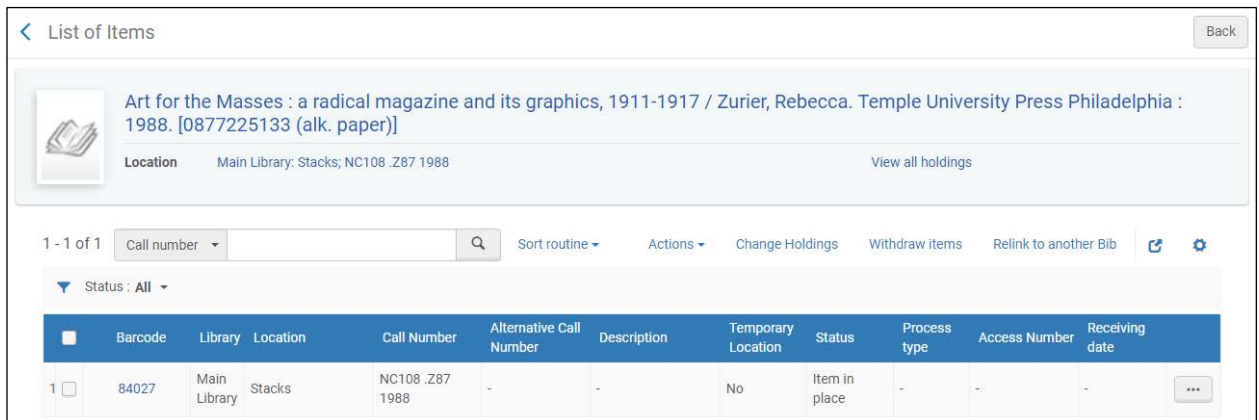
Temporary Location Information

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

- Search for All titles or Physical titles and select the **Items** link from the row actions or by right-clicking anywhere in the record .



This opens a list of all item records associated with the bibliographic record. If there are multiple holdings records for the title, items associated with all holdings records are displayed.



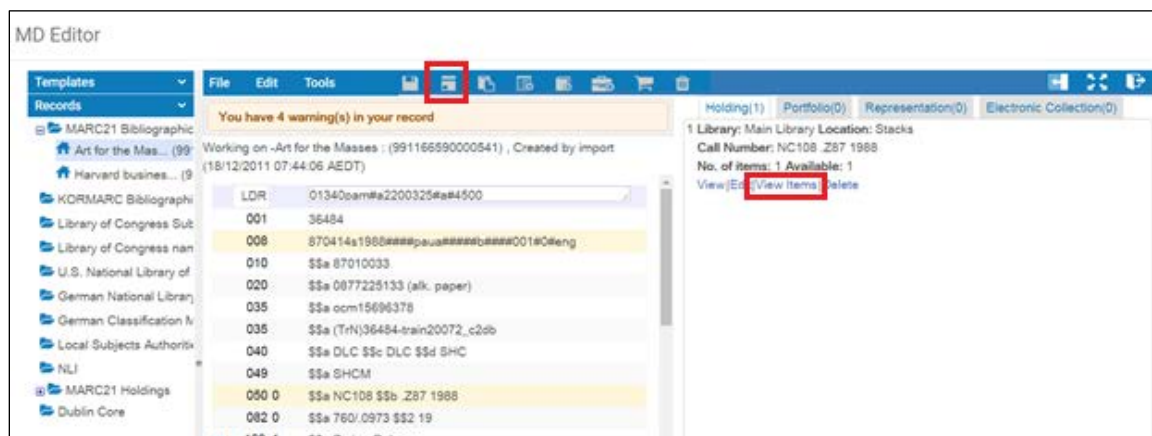
From this display, you can:

- Click the **barcode** to open the record in view only mode.
- Select **Edit** from the row actions or by right-clicking anywhere in the record to open the record for editing in the Physical Item Editor.

Note that you can perform these actions regardless of how you arrived at the List of Items.

### 3 Start in the Metadata Editor.

- a Open a bibliographic record in the Metadata Editor.
- b Click the **View Inventory** icon at the top of the page. Click the **View Items** link for one of the holdings records.



This opens the List of Items associated with this holdings record.

## Reviewing Item Records

When an item record is opened, the **General Information** tab is displayed. Note that in any individual record, you can click **View all holdings** to view the List of Holdings and **View all items** to view the entire List of Items.

The screenshot shows the Physical Item Editor interface. The top section displays item details: 'Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]'. Below this, there are fields for Holding Barcode (84027), Process type, Holdings ID (224813090000541), Item ID (234813080000541), and Status (Item in place). A red box highlights the 'View all holdings' and 'View all items' buttons in the top right. The bottom section has tabs for General Information, ENUM/CIP/ON Information, Notes, and History. The General Information tab is active, showing fields for Barcode (84027), Material type (Book), Item policy, Provenance, PO Line, Receiving date, Enumeration A, Chronology I, Description, Pages, Replacement cost, Copy ID (0), Is magnetic (No), Issue date, Expected receiving date, Enumeration B, Chronology J, Pieces (1), and Receiving operator.



The screenshot displays the 'General Information' tab in the Alma system. It is organized into four main sections:

- Process type:** A dropdown menu at the top.
- Inventory Number Information:** Includes fields for 'Inventory number', 'Inventory date' (with a calendar icon), and 'Inventory price'. A 'Clear Inventory Information' button is located to the right.
- Location Information:** Contains 'Permanent library' (set to 'Main Library') and 'Permanent location' (set to 'Stacks'), both with dropdown arrows. Other fields include 'Alternative call number type', 'Alternative call number', 'Source (Subfield 2)', and 'Storage location ID'.
- Temporary Location Information:** Starts with a radio button group for 'Item is in temporary location' (selected 'No'). It includes 'Temporary library' (a 'Select from a list' dropdown), 'Temporary location' (a dropdown), 'Temporary call number type', 'Temporary call number', 'Source (Subfield 2)', 'Temporary item policy' (a dropdown), and 'Due back date' (with a calendar icon).

Pay particular attention to the data in the following fields of the General Information tab:

- **Process type** (displays in the top panel): If items in your source system have a process status that does not have an exact parallel in Alma, the item is considered not in place in Alma and the item is given a process type of Technical – Migration. The process status from your source system may be mapped to the Internal Note 3 field.
- **Material type:** The value in the source system must be mapped to a valid Alma value.
- **Item policy:** This is also known as the physical item policy, and it potentially affects the terms of use for the item.

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**Note:** Migrated physical items likely have an item policy (Item Policy/Item Status) from your source system. As part of the fulfillment policy simplification process in Alma, these override policies (which are used for exceptional item fulfillment practices) may not be needed in your fulfillment policy setup in Alma. This is determined as part of your configuration setup during implementation. If these override policies are not leveraged in your Alma fulfillment setup, the information stored in the item policy does not serve any functional purpose in Alma.

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- **PO line:** If the item is linked to a PO line, the PO line number should be in this field.
- **Is magnetic:** If the source system data contains an indication that the item is magnetic, the value should be **Yes**. The value is blank for non-magnetic and unknown values.
- **Permanent library and Permanent location:** Note that in Alma these values are controlled by the holdings record unless the item has been moved temporarily. The call number is also



held in the holdings record and is not displayed in an item record field; however, it is displayed as a holdings record link in the upper part of the screen.

- **Temporary library, Temporary location, Temporary call number type, Temporary call number, and Temporary override policy:** If the item is in a temporary location, check these values.

For serial titles, review enumeration and chronology data in the **ENUM/CHRON Information** tab.

The screenshot shows the 'Physical Item Editor' window. At the top, there's a header with a back arrow, the title 'Physical Item Editor', and 'Cancel' and 'Save' buttons. Below the header, a light blue banner displays the item title: 'The Journal of business. University of Chicago Press [Chicago] v. 27- Jan. 1954- [0021-9398]'. To the left of the title is a small icon of a book. To the right of the title are three links: 'View all holdings', 'View all items', and 'Browse shelf listing'. Below the banner, there's a section with item details: 'Holding' (Main Library: Stacks; 1), 'Barcode' (11305), 'Process type' (-), 'Holdings ID' (228549990000541), 'Item ID' (238549980000541), and 'Status' (Item in place). Below this is a tabbed interface with four tabs: 'General Information', 'ENUM/CHRON Information' (which is active), 'Notes', and 'History'. The 'ENUM/CHRON Information' tab contains two columns of input fields. The left column is for 'Enumeration' with fields A through H. Field A is filled with '2013'. The right column is for 'Chronology' with fields I through M, and a 'Break Indicator' dropdown menu. Below these fields is a 'Pattern Information' section with a dropdown arrow. It contains 'Pattern type' and 'Type of unit' (both with dropdown arrows) and a 'Linking number' field (with a dropdown arrow).

As noted above, the value in the **Description** field is displayed in the brief records that result from a physical items search. It also is displayed in the **Description** column of the List of Items.

(If an item record contains any value in the Description field, the request form in the Primo Get It tab allows for an item-level request. By default, requests created in Primo for items without a Description are title-level requests. For title-level requests, if multiple copies of the requested title exist, Alma determines the most appropriate copy to fulfill the request, based on availability, proximity, fulfillment rules, and policies, etc.).

For systems that do not have structured/standard Enum/Chron field information, the serial details will be migrated to the item Description field.

Note that enumeration and chronology information for serial monographs also appears in the ENUM/CHRON Information tab.

Check the **Notes** tab for Public, Fulfillment, and Internal notes.

The screenshot shows the 'Physical Item Editor' interface. At the top, there's a title bar with a back arrow, 'Physical Item Editor', a status indicator 'title contains journal of', and 'Cancel' and 'Save' buttons. Below this is a header section with a book icon, the title 'Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]', and an information icon. A table below the header displays item details: Holding (Main Library: Stacks; NC108 .Z87 1988), Barcode (84027), Process type (-), Holdings ID (224813090000541), Item ID (234813080000541), and Status (Item in place). To the right of the table are links: 'View all holdings', 'View all items', and 'Browse shelf listing'. Below the header is a tabbed interface with 'General Information', 'ENUM/CHRON Information', 'Notes' (selected), and 'History'. The 'Notes' tab contains three sections: 'Public note' and 'Fulfillment note' (each with a text input field), 'Internal Notes' (with three input fields, the third containing a long alphanumeric string), and 'Statistics Notes' (with three input fields).

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**Note:** When there is an item field in the source system that has no corresponding field in Alma, the value from this field may be copied to **Internal Note 3**.

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## Testing Basic Item Record Editing Functionality

To test basic item record editing functionality:

- 1 Add a temporary library to a record.
  - a In the Physical Item Editor, open an item record that does not have a temporary location.
  - b In the **Temporary Location Information** section, click the **Yes** radio button for **Item is in temporary location**:

Temporary Location Information

Item is in temporary location ☐ No ☒ Yes

Temporary library  Temporary location

Temporary call number type  Temporary call number

Source (Subfield 2)

Temporary item policy  Due back date

- c From the **Temporary location** field, select the temporary library and location.

Temporary Location Information

Item is in temporary location ☒ No ☐ Yes

Temporary location

Temporary call number type  Temporary call number

Source (Subfield 2)

Choose prefix  Generate Calculate

Temporary item policy  Due back date

- d Click the **Save** button in the top right corner of the page. You are returned to the List of Items. There should be a message at the top of the page indicating that the record was updated successfully, and a value in the **Temporary location** field.

Institution Community

The data for "Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]" has been successfully updated

1 Art for the Masses : a radical magazine and its graphics, 1911-1917 / Rebecca Zurier ; with an introd. by Leslie Fishbein, and artists' biographies by Elise K. Kenney and Earl Davis. Edit Item Request

Book By Zurier, Rebecca. (Philadelphia : Temple University Press 1988.) Call Number: NC108 .Z87 1988

Barcode: 84027 Call Number Type: Library of Congress classification

Update Date: 04/06/2017 Status: Item in place

Library: Main Library Material Type: Book

Temporary Library: Graduate Library

Permanent Location: stacks


Temporary Location: Reference

User details

- 2 Add a description to a record.
- a In the Physical Item Editor, open an item record that does not include a description.
- b Type a value in the **Description** field.

Physical Item Editor Cancel Save

**title contains journal of**

 **Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]**

|                     |                                       |                    |                 |                                      |
|---------------------|---------------------------------------|--------------------|-----------------|--------------------------------------|
| <b>Holding</b>      | Main Library: Stacks; NC108 .Z87 1988 | <b>Holdings ID</b> | 224813090000541 | <a href="#">View all holdings</a>    |
| <b>Barcode</b>      | 84027                                 | <b>Item ID</b>     | 234813080000541 | <a href="#">View all items</a>       |
| <b>Process type</b> | -                                     | <b>Status</b>      | Item in place   | <a href="#">Browse shelf listing</a> |

General Information **ENUM/CHRON Information** Notes History

|                  |                    |          |                         |    |
|------------------|--------------------|----------|-------------------------|----|
| Barcode          | 84027              | Generate | Copy ID                 | 0  |
| Material type    | Book               |          | Item policy             |    |
| Provenance       |                    |          | Is magnetic             | No |
| PO Line          | Select from a list |          | Issue date              |    |
| Receiving date   |                    |          | Expected receiving date |    |
| Enumeration A    |                    |          | Enumeration B           |    |
| Chronology I     |                    |          | Chronology J            |    |
| Description      | Additional copy    | Generate | Pieces                  | 1  |
| Pages            |                    |          | Receiving operator      |    |
| Replacement cost |                    |          |                         |    |
| Process type     |                    |          |                         |    |

- c Click the **Save** button. You are returned to the List of Items. There should be a message at the top of the screen indicating that the record was successfully updated and the description you typed should appear in the **Description** field.

Institution Community

**The data for "Art for the Masses : a radical magazine and its graphics, 1911-1917 / Zurier, Rebecca. Temple University Press Philadelphia : 1988. [0877225133 (alk. paper)]" has been successfully updated**

**1 Art for the Masses : a radical magazine and its graphics, 1911-1917 / Rebecca Zurier ; with an introd. by Leslie Fishbein, and artists' biographies by Elise K. Kenney and Earl Davis.** Edit item Request ...

|  |   |
|--|---|
| <b>Book</b> By Zurier, Rebecca. (Philadelphia : Temple University Press 1988.) | <b>Call Number:</b> NC108 .Z87 1988                         |
| <b>Barcode:</b> 84027  | <b>Call Number Type:</b> Library of Congress classification |
| <b>Update Date:</b> 04/06/2017   | <b>Status:</b> Item in place                                |
| <b>Library:</b> Main Library   | <b>Material Type:</b> Book                                  |
| <b>Temporary Library:</b> Graduate Library                                     | <b>Description:</b> Additional copy                         |
| <b>Permanent Location:</b> Stacks  |   |
| <b>Temporary Location:</b> Reference   |   |

[Other details](#)

- 3 Edit a barcode.
- In the Physical Item Editor, open an item record.
  - Click the Barcode link in the brief record to enter the item record edit mode.
  - Type a new value in the **Barcode** field.

