



The State University of New York

Resource Management Summer Tune-Up

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Resource Management Summer Tune-Up

In this session we will cover:

1. Moving items out of the Technical-Migration item process status
2. Find items with a location of -1, Null, None, and Unassigned
3. Identifying bib records without inventory
4. Configuring Enumeration (Enum) and Chronology (Chron) templates for serials



MOVING ITEMS OUT OF THE TECHNICAL MIGRATION ITEM PROCESS STATUS

Technical - Migration

- Technical - Migration item status was created during migration for item process statuses that existed in the previous Library Management System (LMS), but do not exist in Alma
- The “Change Physical Items” job must be run on items with the Technical - Migration process type to be able to change the items process type

Steps to move items out of a process type of Technical – Migration:

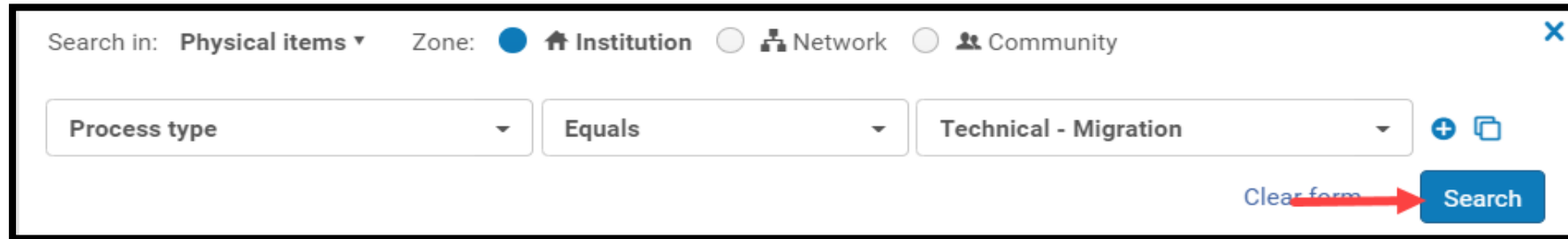
1. Identify items with a process type of Technical – Migration
2. Export the repository results for items with the process type Technical – Migration
3. Create an itemized set of records for items with the process type Technical – Migration
4. Run the “Change Physical Items” job on the itemized set to mark the items missing
5. Run the “Change Physical Items” job on the itemized set to mark the items out of the missing process status





Technical - Migration

To move items out of the Technical – Migration process status:

1. Perform a Physical Items search on the ***Physical Item: Process Type: Equals: Technical – Migration***



The screenshot shows a search interface with the following elements:

- Search in: Physical items ▾
- Zone: Institution Network Community
- Process type ▾
- Equals ▾
- Technical - Migration ▾
- + 
- Clear form  Search

2. Click the **Export icon>Excel Current View** from the repository results
3. Create an itemized set
 - a) Go to ***Admin>Manage Jobs and Sets>Manage Sets***
 - b) Click ***Add Set>Itemized***

Technical - Migration

To move items out of the Technical – Migration process status continued:

3. Set Details screen opens:
 - a) Name: [Name the set - Mandatory]
 - b) Description: [Optional]
 - c) Private: [Default is No, change to Yes if sharing the set]
 - d) Set Content Type: [Physical items]
 - e) Status: [Active]
 - f) Add Contents from File to Set: [File]
 - g) Click on the file icon to upload file
 - h) Click **Save**

The screenshot displays the 'Set Details' interface. At the top right, there is a 'Save' button highlighted with a red arrow. The main form area is titled 'General Information' and contains the following fields and options:

- Set name:** Technical Migration
- Description:** (empty text box)
- Note:** (empty text box)
- Set content type:** Physical Items
- Set type:** Itemized
- Private:** Yes (selected) / No
- Status:** Active (selected) / Inactive
- Creation date:** 08/17/2021 11:08 AM
- Created by:** Ex Libris
- Updated by:** Ex Libris
- Content Origin:** Institution only (selected) / Discovery
- Set ID:** -

Below the 'General Information' section is the 'Add Contents from File to Set' section. It includes radio buttons for 'From File' (selected) and 'From Analytics'. There is a 'File' input field with a file icon to its right, which is highlighted with a red arrow. A note below the field states 'The maximum file size is 10 MB.'

Technical - Migration

To move items out of the Technical – Migration process status continued:

3. Run the “Change Physical Items” job
 - a) Go to **Admin>Manage Jobs and Set>Run a job**
 - b) Search for the “*Change Physical Items*” job by name
 - c) Click the radio button next to “*Change Physical Items*”
 - d) Click **Next**
 - e) Click the radio button next to the set
 - f) Click **Next**
 - g) Check the box next to Missing under the Change General Information section
 - h) Select Missing from the drop-down menu
 - i) Keep Unconditional as the condition
 - j) Click **Next**
 - k) Review the job parameters
 - l) Click **Submit**
 - m) Click **Confirm**



Technical - Migration

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Back Next

<input type="checkbox"/>	Physical condition		Condition	Unconditionally
<input checked="" type="checkbox"/>	Missing status	Missing	Condition	Unconditionally
<input type="checkbox"/>	Remove remote storage transit			

Technical - Migration

To move items out of the Technical – Migration process status continued:

4. Run the “Change Physical Items” job again
 - a) Go to **Admin>Manage Jobs and Set>Run a job**
 - b) Search for the “*Change Physical Items*” job by name
 - c) Click the radio button next to “*Change Physical Items*”
 - d) Click **Next**
 - e) Click the radio button next to the set
 - f) Click **Next**
 - g) Check the box next to Missing under the Change General Information section
 - h) Keep the missing status blank
 - i) Keep Unconditional as the condition
 - j) Click **Next**
 - k) Review the job parameters
 - l) Click **Submit**
 - m) Click **Confirm**



Technical - Migration

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Book Next

<input type="checkbox"/>	Physical condition		Condition	Unconditionally
<input checked="" type="checkbox"/>	Missing status		Condition	Unconditionally



Technical - Migration

1 **The Wire. : the Complete Series / Home Box Office.**
Visual material By Simon, David, ([New York] : Home Box Office, 2008.)
Barcode: 32821014080171
Library: Sojourner Truth Library
Temporary Library: Sojourner Truth Library
Creation Date: 01/14/2015 7:00 PM
Modification Date: 06/23/2019 5:06 AM
Process type: Technical - Migration
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Media/Video
Temporary Location: Reserve Collection

1 **The Wire. : the Complete Series / Home Box Office.**
Visual material By Simon, David, ([New York] : Home Box Office, 2008.)
Barcode: 32821014080171
Library: Sojourner Truth Library
Temporary Library: Sojourner Truth Library
Creation Date: 01/14/2015 7:00 PM
Modification Date: 08/16/2021 11:31 AM
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Media/Video
Temporary Location: Reserve Collection

**Technical-
Migration has
been removed**

FIND ITEMS IN LOCATIONS
OF -1, NULL, NONE,
AND UNASSIGNED

Find Items in Locations of -1, Null, None, and Unassigned


- Items by location can be found from:
 - A repository search
 - The Data Review Dashboard
 - Analytics
- The purpose of locating physical items in locations of None and Unassigned is to identify items in the collection that need to be:
 - Updated to the correct location
 - Removed from the collection
- The following values cannot be found using a repository search, data review dashboard, or analytics:
 - -1: It is a structural placeholder, and it is used to maintain structural integrity for the data
 - Example, User ID on an anonymized loan
 - Null: Is an OAS out of the box filter selection that is not an actual value in Alma



Find Items in Locations of None and Unassigned

To find items in the Unassigned location using an advanced repository search:

1. Click on the **Advanced Search** icon
2. Select the following search parameters: **Physical Items: Current locations: Equals: Unassigned**
 - Select this location for all libraries
3. Click **Search**



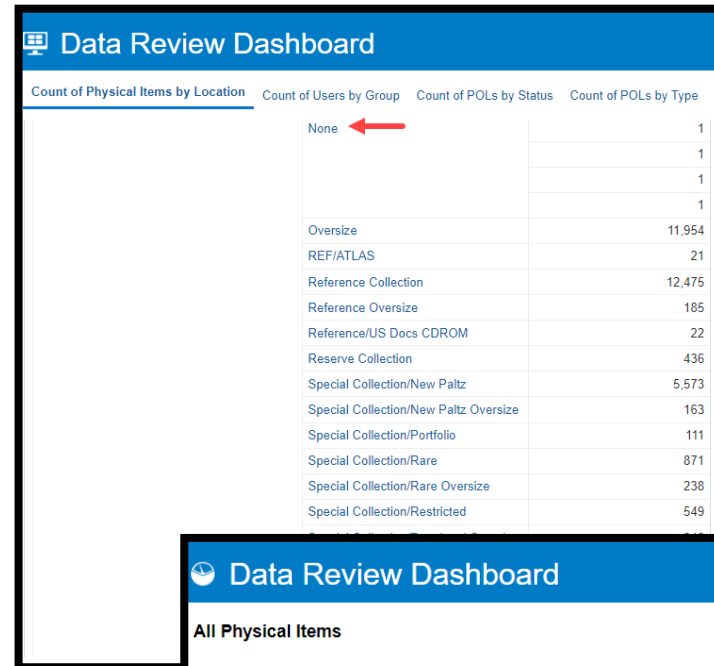
The screenshot shows an advanced search interface with the following elements:

- Search in: **Physical items** (dropdown)
- Zone: **Institution** (radio button), Network, Community
- Current location (dropdown)
- Equals (dropdown)
- Sojourner Truth Library : (dropdown)
- UNASSIGNED location (UNASSIGNED) (dropdown)
- Clear form (text) with a red arrow pointing to the Search button
- Search (button)

Find Items in Locations of None and Unassigned

To find items in locations of None, and Unassigned using the Alma Data Review Dashboard:

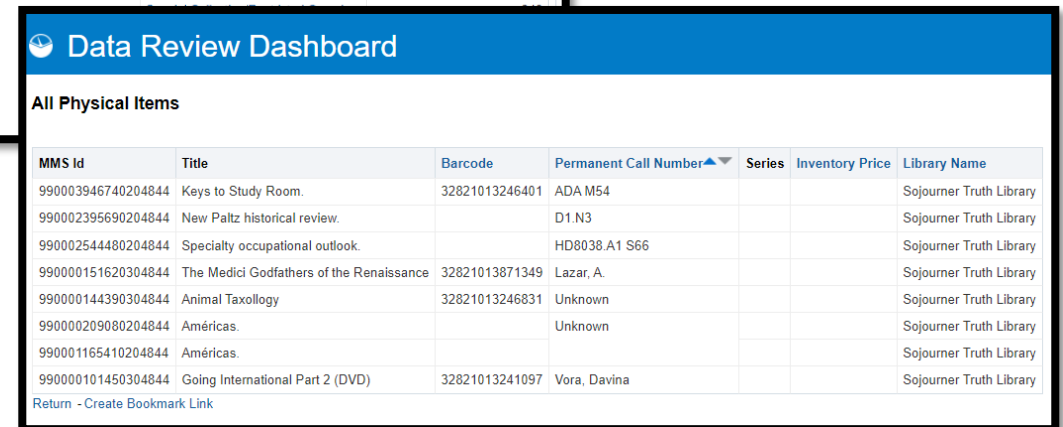
1. Go to ***Analytics>Reports>Data Review Dashboard***
2. Count of Physical Items by Physical Location displays
3. Click on the Location Name link



Data Review Dashboard

Count of Physical Items by Location | Count of Users by Group | Count of POLs by Status | Count of POLs by Type

Location	Count
None	1
	1
	1
	1
Oversize	11,954
REF/ATLAS	21
Reference Collection	12,475
Reference Oversize	185
Reference/US Docs CDROM	22
Reserve Collection	436
Special Collection/New Paltz	5,573
Special Collection/New Paltz Oversize	163
Special Collection/Portfolio	111
Special Collection/Rare	871
Special Collection/Rare Oversize	238
Special Collection/Restricted	549



Data Review Dashboard

All Physical Items

MMS Id	Title	Barcode	Permanent Call Number	Series	Inventory Price	Library Name
990003946740204844	Keys to Study Room.	32821013246401	ADA M54			Sojourner Truth Library
990002395690204844	New Paltz historical review.		D1.N3			Sojourner Truth Library
990002544480204844	Specialty occupational outlook.		HD8038.A1 S66			Sojourner Truth Library
990000151620304844	The Medici Godfathers of the Renaissance	32821013871349	Lazar, A.			Sojourner Truth Library
990000144390304844	Animal Taxology	32821013246831	Unknown			Sojourner Truth Library
990000209080204844	Américas.		Unknown			Sojourner Truth Library
990001165410204844	Américas.					Sojourner Truth Library
990000101450304844	Going International Part 2 (DVD)	32821013241097	Vora, Davina			Sojourner Truth Library

[Return](#) - [Create Bookmark Link](#)

Find Items in Locations of None and Unassigned

To find items in locations of None and Unassigned using Analytics:

1. Go to ***Analytics>Analytics>Design Analytics***
2. Go to ***Shared Folders>Community>Reports>Consortia>SUNY>Resource Management>Physical Items with Locations of None and Unassigned***
3. Click ***Edit*** to view the results
4. Click on the ***Export this analysis icon>formatted>format type*** to export the results



MMS Id	Title	Barcode	Item Creation Date	Location Code	Location Name
990000101450304844	Going International Part 2 (DVD)	32821013241097	8/24/2010	MEDIA	None
990000107410304844	Science When Industry Goes To School	32821013235149	1/12/2011	UNASSIGNED	UNASSIGNED location
990000111630304844	Power of Myth	32821013234712	2/12/2011	UNASSIGNED	UNASSIGNED location

NOTE: Do Not Edit the Report, instead “Save as” to your institution’s reports folder and then edit the report



IDENTIFY BIB RECORDS WITHOUT INVENTORY

Identify Bib Records Without Inventory

- Finding bib records without inventory requires an All Titles advanced repository search
- Bib records without inventory will include the following resource types:
 - Physical
 - Electronic
- Can perform separate repository searches for:
 - Suppressed bib records
 - Bib records that are not suppressed
- Review the bib record results records without inventory for container records used for:
 - Standing orders
 - Databases
- Bib records cannot be deleted if they have POLs that are not closed
- Do not delete bib records without inventory with current subscriptions (POLs) for:
 - Standing Orders
 - Databases



Identify Bib Records Without Inventory

Steps to identify bib records without inventory:

1. Perform an advanced repository search for items without inventory
2. Export the Results to Excel and/or create a set
3. Review the results
4. Create an itemized set of records to be deleted
5. Run the “Delete Bibliographic Records” job on the set



Identify Bib Records Without Inventory

To identify bib records without inventory:

1. Perform an advanced repository search for ***All Titles: Has Inventory: Equals: NO AND Tag Suppressed (Title):equals: [Yes or No]***

The screenshot shows an advanced search interface with the following elements:

- Search in: All titles ▾
- Zone: Institution Network Community
- Search criteria 1: Has Inventory ▾ Equals ▾ No ▾
- Search criteria 2: Tag Suppressed (Title) ▾ Equals ▾ No ▾
- Logic: AND OR
- Buttons: +, Copy, X
- Buttons: +, Copy, X
- Buttons: Clear form (with a red arrow pointing to the Search button), Search

NOTE: to create a set for all bib records without inventory omit the Tag Suppressed (Title) search parameter

Identify Bib Records Without Inventory

To identify bib records without inventory continued:

2. Export or create a set of records to review (or export the results to Excel)
 - a) To export a set:
 - I. Click on the ***Export List icon>Excel Current View***
 - b) To create a set:
 - a) Click ***Save and Filter Query***
 - b) Set Details screen opens
 - a) Name: [Name the set – mandatory]
 - b) Description: [Optional]
 - c) Set Contents Types: [All Titles]
 - d) Private: [Default is No, change to Yes if sharing the set]
 - e) Status: [Active]
 - f) Click ***Save***



Identify Bib Records Without Inventory

To identify bib records without inventory continued:

3. Review the records
 - a) Export results to excel
 - b) Remove any titles that should not be deleted
4. Create an itemized set
 - a) Go to **Admin>Manage Jobs and Sets>Manage Sets**
 - b) Click **Add Set>Itemized**
 - c) Set Details Screen opens
 - I. Name: [Name set - Mandatory]
 - II. Set content type: [All Titles]
 - III. Private: [Default is No, change to Yes if sharing the set]
 - IV. Status: [Active]
 - V. Add Contents from File to Set: [File]
 - VI. Click on the file icon to upload file
 - VII. Click **Save**



Identify Bib Records Without Inventory

To identify bib records without inventory continued:

5. Run the “Delete Bibliographic Records” job
 - a) Go to **Admin>Manage Jobs and Sets>Run a Job**
 - b) Search for the “Delete Bibliographic Records” job by name
 - c) Click the radio button next to “Delete Bibliographic Records”
 - d) Click **Next**
 - e) Click the radio button next to the set
 - f) Click **Next**
 - g) Select the task parameters to be used when deleting the set of bib records:
 - a) Do not delete if related to other records
 - a) Recommendation is to leave this box unchecked
 - b) Delete all associated inventory resources
 - c) May need to be checked this box if there is associated inventory or the bib record will not be deleted
 - h) Click **Next**
 - i) Review the job parameters
 - j) Click **Submit**
 - k) Click **Confirm**



Identify Bib Records Without Inventory

< Set Details Add Members to Set Cancel Save

General Information

Set name *

Description

Note

Set content type *

Set type **Itemized**

Private Yes No

Status Active Inactive

Creation date **08/16/2021 11:07 AM**

Created by **Ex Libris**


Updated by **Ex Libris**

Content Origin Institution only Discovery

Set ID -

Add Contents from File to Set

From File From Analytics

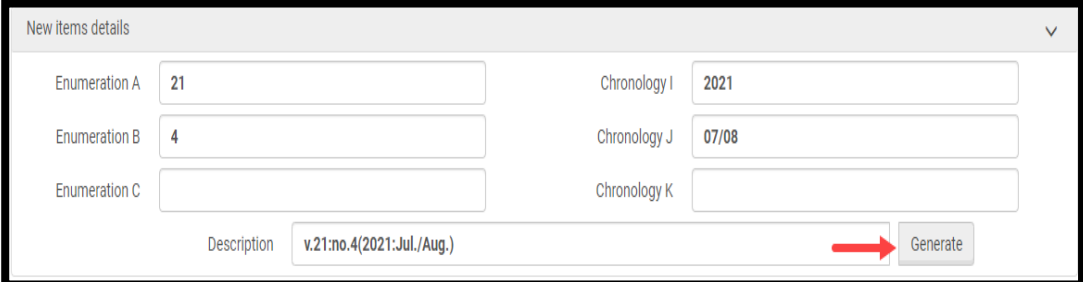
File  The maximum file size is 10 MB.



CONFIGURING ENUMERATION AND CHRONOLOGY TEMPLATES FOR SERIALS

Configuring Enumeration and Chronology Description Templates

- One of the following roles is required to configure description templates:
 - Repository Administrator
 - Catalog Administrator
 - General Administrator
- The default description template is used when “Generate Description” is clicked when receiving continuous titles if:
 - Other description templates are not configured
 - No matching description template exists
- Before configuring description templates:
 - Compile a list of serials descriptions used at your library
 - Make sure the punctuation and spacing are correct per your institution’s policies



The screenshot shows a web form titled "New items details". It contains several input fields: "Enumeration A" with the value "21", "Enumeration B" with "4", and "Enumeration C" which is empty. On the right side, there are "Chronology I" with "2021", "Chronology J" with "07/08", and "Chronology K" which is empty. At the bottom, there is a "Description" field containing the text "v.21:no.4(2021:Jul./Aug.)" and a "Generate" button with a red arrow pointing to it.

v. no. (year:month)
v. no. (year:month_day)
v. (year)
v. no. (year)
v. (year:month)
yr/month

Configuring Enumeration and Chronology Description Templates

Enumeration (Enum)	
A (a)	First level of enumeration
B (b)	Second level of enumeration
C (c)	Third level of enumeration
D (d)	Fourth level of enumeration
E (e)	Fifth level of enumeration
F (f)	Sixth level of enumeration

Chronology (Chron)	
I (i)	First level of chronology
J (j)	Second level of chronology
K (k)	Third level of chronology
L (l)	Fourth level of chronology
M (m)	Alternative numbering scheme, chronology
V (v)	Issuing date

Example 1: v.92:no.17(2021: August 17)

- v. = Enum A (first level)
- no. = Enum B (second level)
- Year = Chron I (first level)
- Month = Chron J (second level)
- Day = Chron K (third level)

Example 2: no.17(2021)

- no. = Enum A (first level)
- Year = Chron I (first level)



Configuring Enumeration and Chronology Templates

- Prediction patterns use numeric values to represent months and seasons out of the box in Alma
 - Description templates can be configured to allow for the display of the alphabetic representation for month and/or season

Month	Alma Display
January	01
February	02
March	03
April	04
May	05
June	06
July	07
August	08
September	09
October	10
November	11
December	12

Season	Alma Display
Spring	21
Summer	22
Fall	23
Winter	24

Configuring Enumeration and Chronology Templates

To configure description templates:

1. Go to **Configuration Menu>Resources>General>Description Templates**
2. Click **Add Rule**
3. The Description Template Setup screen opens
 - a) Name: [Name the template]
 - b) Description: [Optional]
 - c) Click **Add Parameter** (need to repeat for each enum/chron field in the template)
 - a) Name: [Select the enum or chron necessary]
 - b) Operator: [Select “is not empty”]
 - c) Click **Add Parameter**
 - d) Output Parameters: [Populate the parameters for the way the enum/chron should display]
 - Values are added in the prefixes and suffixes
 - Spaces can be added in the prefixes and suffixes to separate values
 - e) Click **Save**
 - f) Repeat steps 2-3 for each description template being configured



Configuring Enumeration and Chronology Description Templates

< Description Template Setup Cancel Save

Description Template Setup Editor

Name *

Description

Created By **Ex Libris** Created On **08/16/2021**

Updated By **Ex Libris** Updated On **08/16/2021**

Input Parameters

+ Add Parameter

Name	Operator	Value
1 EnumA	Is Not Empty	-
2 EnumB	Is Not Empty	-
3 ChronI	Is Not Empty	-

Output Parameters

Prefix1	<input type="text" value="v."/>	Field1	<input type="text" value="EnumA"/>	Suffix1	<input type="text" value=":"/>
Prefix2	<input type="text" value="no."/>	Field2	<input type="text" value="EnumB"/>	Suffix2	<input type="text"/>
Prefix3	<input type="text" value="("/>	Field3	<input type="text" value="ChronI"/>	Suffix3	<input type="text" value=")"/>
Prefix4	<input type="text"/>	Field4	<input type="text"/>	Suffix4	<input type="text"/>
Prefix5	<input type="text"/>	Field5	<input type="text"/>	Suffix5	<input type="text"/>



Configuring Enum and Chron to Display Month Instead of Number

- A description template must be configured for each month per enumeration and chronology for the month to display instead of the numeric equivalent (12 per description template)
- The rules can be duplicated to speed up the process



Configuring Enum and Chron to Display Month Instead of Number

To create a description template for the name of the month to display:

1. Go to **Configuration Menu>Resources>General>Description Templates**
2. Click **Add Rule**
3. The Description Template Setup screen opens
 - a) Name: [Name the template]
 - b) Description: [Optional]
 - c) Click **Add Parameter** (need to repeat for each enum/chron field in the template)
 - a) For all enum and chron except the value used for month display:
 - a) Name: [Select the enum or chron]
 - b) Operator: [Select “is not empty”]
 - c) Click **Add Parameter**
 - b) For the value being used for month display:
 - a) Name: [Select the enum or chron]
 - b) Operator: [Select “equals”]
 - c) Value: [Type numeric value of the month]
 - d) Click **Add Parameter**



Configuring Enum and Chron to Display Month Instead of Number

← Description Template Setup Cancel Save

Description Template Setup Editor



Name *






Description

Created By **Staff, Ex Libris** Created On **06/13/2019**

Updated By **Staff, Ex Libris** Updated On **08/16/2021**

Input Parameters

[+ Add Parameter](#)  

	Name	Operator	Value	
1	ChronJ	=	01	
2	EnumA	Is Not Empty	-	
3	EnumB	Is Not Empty	-	
4	ChronI	Is Not Empty	-	
5	ChronK	Is Not Empty	-	



Configuring Enum and Chron to Display Month Instead of Number

To create a description template for the name of the month to display continued:

1. The Description Template Setup screen opens continued:
 - d) Output Parameters: [Populate the parameters for the way the enum/chron should display]
 - Values are added in the prefixes and suffixes
 - Spaces can be added in the prefixes and suffixes to separate values
 - Do not add the enum or chron field for the month configured in the Input parameters
 - Type the month in the prefix prior to the enum or chron the month precedes

Name	Operator	Value
Output Parameters		
Prefix1	v.	Field1 EnumA Suffix1 :
Prefix2	no.	Field2 EnumB Suffix2
Prefix3	(Field3 ChronI Suffix3 :
Prefix4	Jan.	Field4 ChronK Suffix4)
Prefix5		Field5 Suffix5

e) Click **Save**



SUPPORTING DOCUMENTATION



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Supporting Documentation

SLS:

- [Moving Items Out of the Technical Migration Process Status](#)
- [Bib Records Without Inventory](#)
- [Prediction Patterns](#)

Ex Libris:

- [Batch delete Process Type "Technical - Migration", or putting items in place in bulk](#)
- [Configuring Item Description Templates](#)
- [How to Display Enumeration Level b Value as Text in the Item Description](#)

