#### On the Happy Path to an Alma Future

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GIL Users Group Meeting (GUGM) 2016
Shaping the Future Together

In the context of software or information modeling, a happy path is a default scenario featuring no exceptional or error conditions, and comprises the sequence of activities executed if everything goes as expected.

Wikipedia contributors, "Happy path," *Wikipedia, The Free Encyclopedia,* <a href="https://en.wikipedia.org/w/index.php?title=Happy">https://en.wikipedia.org/w/index.php?title=Happy</a> path&oldid=615829885 (accessed May 13, 2016).

Happy path testing is a welldefined test case using known input, which executes without exception and produces an expected output.

## Happy day scenario and golden path are synonyms for happy path.

Wikipedia contributors, "Happy path," *Wikipedia, The Free Encyclopedia,* <a href="https://en.wikipedia.org/w/index.php?title=Happy">https://en.wikipedia.org/w/index.php?title=Happy</a> path&oldid=615829885 (accessed May 13, 2016).

### The Happy Path to Alma

- Data clean-up
- Training
- Migration form
- Configuration form
- Testing

## Data Cleanup Highlights Georgia Southern

- Mismatched Locations (5,140) Task 1
  - Location on holdings (mfhd) does not match one or more item records
  - Result of much collection relocation to Automated Retrieval System over last 10 years
  - Split locations for serial and periodical runs
  - Lengthy process: Had to physically check for actual location in many cases
  - Will run report again before next record load
- Duplicate e-journal titles (P2E)
  - Result of having e-journal records in Voyager catalog and ALMA adding same title from CZ
  - Still determining resolution for next load

### **Duplicate E-Journal Records**

106 潳 The accounting historians journal [electronic resource].

Journal (Journal - Electronic) By Academy of Accounting Historians. (University, Ala.: Academy of Accounting Historians Began with v. 4, no. 1 (spring 1977))

ISSN: 2327-4468 and others

Subject: Accounting Periodicals. History -- Electronic journals. Language: English Medium Type: [electronic resource]. Record number: (GStG)833819-gasouthdb

Availability: Electronic version at Online: Full Text

Edit | Request | Document Delivery | Add to reading list | Portfolio List | Add to collection | View It | More info

107 M. The accounting historians journal [electronic resource].

Journal (Journal - Electronic) By Academy of Accounting Historians. (University, Ala.: Academy of Accounting Historians Vol. 4, no. 1 (spring 1977)-)

ISSN: 0148-4184

Subject: Accounting Periodicals. History — Accounting. — Electronic journals. Language: English Medium Type: [electronic resource]. Record number: (CONSER)—2007263047

Availability: Electronic version at EBSCOhost Historical Abstracts with Full Text: Full Text

Electronic version at Free E- Journals: Full Text

- Duplicate OCLC numbers (3,154) Task 24
  - Not a result of multiple libraries and bibliographic records
  - Filtered report to include 035s containing OCLC numbers only
  - Caused by early days of OCLC when a "close-enough" record was used
  - Record was modified to match resource being cataloged
  - Duplicates created over time as other editions were added
  - Migrated to Voyager; de-dupe detection would alert now
  - Bonus find giving opportunity to clean up old bibliographic records not matching resource
  - Labor intensive since resource copies had to be pulled to make correction
    - Need a different bibliographic record
    - Match for bibliographic record

- Records without OCLC numbers (67,815) Task 4
  - Systems Librarian refined report to identify locations
  - Cleanup for physical and online items owned by library
  - Some locations excluded from cleanup
    - Reserves
    - Data Driven Acquisitions records (print and electronic)
    - Other temp records
  - Multi-Match Report (1,000)
    - Matching of records as they enter Network Zone
    - Goal is one bibliographic record
    - Different OCLC numbers over time as records are merged in OCLC
    - Results in duplicate records in Network Zone
    - Results in records going to IZ because matches more than one record
    - Most problems = multiple records for same title being loaded with different OCLC numbers for same OCLC record
    - How to avoid in next load?

- Unexpected Cleanup Required (6,676)
  - Serendipitous discovery
  - Alma takes first barcode if inactive has not been deleted
  - Systems Librarian ran report of items with active and

Item Barcode Status	Item Barcode	Item ID	Permanent Location	Item Barcode Status	Item Barcode	Call Number	le
Inactive	0200000004271	282700	stacks4	Active	0200105069187	E444 .L47	
Inactive	0200100208681	289318	stacks3	Active	0200105838078	N6923.B9 C543 1968	
Inactive	0200000072005	289869	stacks4	Active	0200105071480	GV505 .S6	
Inactive	0200100207014	290078	stacks4	Active	0200106207083	E230.5.S7 L494 1969	

## What? Me Worry?

David Lowder

When we received the Alma Configuration Form we were faced with the daunting task of changing our existing circulation policies to fit into the Alma configuration.

In the end it wasn't as bad as we feared.

Circulation policies are based "primarily" on the shelving location and the patron type.

Shelving locations are grouped into Fulfillment Units.

Migrated Voyager item types can be used as "exceptions" to the basic rules.

In the configuration spreadsheet ExLibris wants you to follow their best practices and restricts you to having:

- up to five location types
- up to four patron categories
- up to five item categories

## Bummer!

## From the Fulfillment Tab

U	U			
Fulfillment Tables				
Select one of the suggested values from the drop down list or insert a required value manually.				
Location Types	On Shelf Request Policy			
Stacks	Request for pickup anywhere regardless of availability			
Hourly Loans	No Requesting			
Daily Loans	No Requesting			
Media and Equipment	No Requesting			
Non Circulating	No Requesting			
Patron Types				
Faculty and Staff				
Graduate Students				
Students				
Visitors				
Item Exception Types				
NonCirc				
7 Days				
2 Hours				

#### From the Locations Tab

Enter your location d	etails below. You may insert add	itional rows into this table if required.			
		Physical Location Details			
Library Code	Location Code	Name of Location	Location Type	External Name of Location	Circulation Desk Code
GASOUTH	UNASSIGNED	UNASSIGNED	Non Circulating	UNASSIGNED	DEFAULT_CIRC_DESK
GASOUTH	RESV_HOUR	Reserve Hourly Checkout	Hourly Loans	nd floor-Circulation Desk	DEFAULT_CIRC_DESK
GASOUTH	RESV_DAYS	Reserve Daily Checkout	Daily Loans	2 d floor-Circulation Desk	DEFAULT_CIRC_DESK
GASOUTH	AVAILSOON	CRS Available Soon	Non Circulating	A ailable Soon	DEFAULT_CIRC_DESK
GASOUTH	EDDA	Electronic DDA	Non Circulating	El ctronic Resource	DEFAULT_CIRC_DESK
GASOUTH	DOCSSTACKS	Docs Stacks	Stacks	Documents	DEFAULT_CIRC_DESK
GASOUTH	DOCSCD	Docs CD Cases	Stacks	Do uments CD Cases	DEFAULT_CIRC_DESK
GASOUTH	DOCSMAPS	Docs Map Cases	Non Circulating	Do uments Maps	DEFAULT_CIRC_DESK
GASOUTH	DOCSFICHE	Docs Fiche Cases	Non Circulating	Do uments Microforms	DEFAULT_CIRC_DESK
GASOUTH	DOCSOVR	Docs Oversize	Stacks	Do suments Oversize	DEFAULT_CIRC_DESK
GASOUTH	DOCSREF2	Docs Reference 2nd floor	Non Circulating	2rd floor- Reference Collection	DEFAULT_CIRC_DESK
GASOUTH	DOCSURL	DOCS URL	Non Circulating	D cuments	DEFAULT_CIRC_DESK
GASOUTH	FOD	Films on Demand (GALILEO)	Non Circulating	ms on Demand (GALILEO)	DEFAULT_CIRC_DESK
GASOUTH	GNETLIB	Net Library (GALILEO)	Non Circulating	GALILEO)	DEFAULT_CIRC_DESK
SASOUTH	STACKS3	Stacks 3rd Floor	Stacks	Brd Floor Book Collection	DEFAULT_CIRC_DESK
GASOUTH	LORIMER	Lorimer Reading Rooom	Stacks	4th floor-Lorimer Reading Room	DEFAULT_CIRC_DESK
SASOUTH	NEWSPAPERS	Current Newspapers	Hourly Loans	2nd floor-Circulation Desk	DEFAULT_CIRC_DESK
GASOUTH	WITHDRAWN	Withdrawn	Non Circulating	Withdrawn	DEFAULT_CIRC_DESK

#### From the Users Tab

Code For Group	Name of Group	Patron Type
UpBound	Upward Bound	
GF	GaSoU Faculty/Staff	Faculty and Staff
ST	GaSoU Students	Students
GR	GaSoU Graduat Stude	Graduate Students
co	Community	Visitors
RS	East Georgia Students	Students
FA	Fac/Staff Fam y	Faculty and Staff
RF	East Georgia Faculty	Visitors
VT	OTC Students	Visitors
AS	AASU Studer s	Visitors
HS	AP High School	Visitors
PS	Private School Students	Visitors
PF	Private School Faculty	Visitors
VF	OTC Faculty	Visitors
SS	Sav. St. Univ. Students	Visitors
SF	Sav. St. Univ. Faculty	Visitors
test	test Patron Group	Graduate Students
LIB	Library Staff	Faculty and Staff
UBPatron	Univ. Borrowing Patron	Visitors

#### From the Item Policies Tab

Enter your item policies below. Seect an It Exception Type only for the item policies you vill need as exceptions to the location-based approach Item Code Item Description tem Exception Type GOVUSPERGOVUSPER NonCirc GradRoomKey gradroom Playaway audio book playaway Foy DVD Colle Id NonCirc FOYDVD FOYCDRON Foy CD-ROM ( NonCirc Foy VHS Collection FOYVHS foynoncirc Foy Non Circulatir NonCirc воок BOOK VIDEO VIDEO 7 Days CD-MUSIC CD-MUSIC MICROFILM MICROFILM NonCirc MICROFICH MICROFICHE NonCirc REFBOOK REFBOOK FILM FILM TRANSPAR TRANSPARCY FILMSTRIP FILMSTRIP GAME GAME CHART CHART FLASHCAR FLASHCARD NEWSPAPENEWSPAPER PHOTOCOP PHOTOCOPY RECORD RECORD EQUIPMENT EQUIPMENT

noncirc	Non Circ Boo	k	NonCirc	
1HrRes	1 Hour Reser	ve	2 Hours	
2HrRes	2 Hour Reser	ve	2 Hours	
3HrRes	3 Hour Reser	VE		
1DayRes	1 Day Resen	/6		
3DayRes	3 Day Resen			
1WkRes	1 Week Rese	ve	7 Days	
TECHCD	Tech Fee CD			
TECHVID	Tech Fee Vio	eo		
DVD	DVD		7 Days	
govga	Georgia Doc			
govgacd	Ga Doc CD			
govgamap	Ga Doc Mar			
govgamf	Ga Doc MF			
govgapic	Ga Doc Pic			
govgaref	Ga Doc Ref			
govgaurl	Ga Doc URL			
govgavideo	Ga Doc Vide			
GOVUS_NO	GOVUS_NO	CII	NonCirc	
GOVUSVID	GOVUSVIDE	(		
SCPAPERS	SCPAPERS	1		
camcorder	Video camco	rde		
camera	Digital Came	ra		
FOYBOOK	Foy Book Co	llecti	η	

### No need to panic!

This is for the migration process and can be modified/expanded as needed once you get your test load.

I'm feeling better about this!

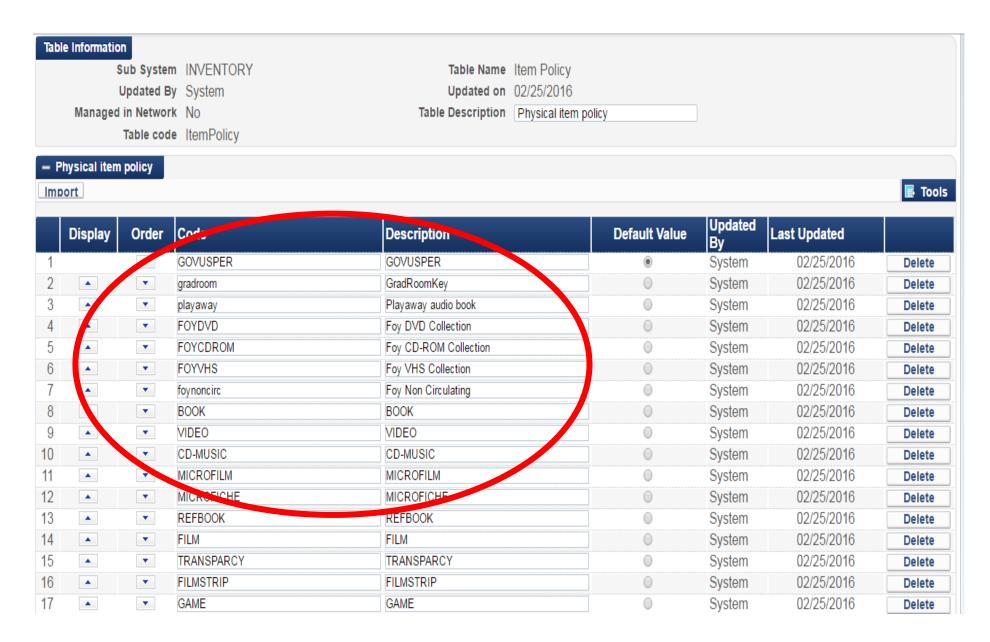
## Your Locations are still there

Location Type All	ttacht   Eulfillment Unit   All   Q		Find:
Add Location			1 2 3 b b Go 1 - 20 of 46 Records Co
Code	♦ Name	<b>♦</b> Location Type	Fulfillment Unit
WITHDRAWN	Withdrawn	Open	Non Circulating
2 <u>UNASSIGNED</u>	UNASSIGNED	Open	Non Circulating
3 STACKSOVR4	Stacks Oversize 4rd Floor	Open	Stacks
4 STACKSOVR3	Stacks Oversize 3rd Voor	Open	Stacks
5 STACKS4	Stacks 4th Floor	Open	Stacks
6 STACKS3	Stacks 3rd Floor	Open	Stacks
7 SPECCOLL	Special Collections	Open	Non Circulating
8 RESV_OTHER	Reserve - Other	Open	Media and Equipment
9 RESV_HOUR	Reserve Hourly Checkout	Open	Hourly Loans
10 RESV_DAYS	Reserve Daily Checkout	Open	Daily Loans
11 RESV_ARC	Reserve - ARC	Open	Stacks
12 <u>REFATLAS</u>	Reference Atlas	Open	Stacks
13 <u>REFERENCE</u>	Reference	Open	Non Circulating
14 <u>PDDA</u>	Print DDA	Open	Non Circulating
15 <u>NOTUSED</u>	NOT USED	Closed	-
16 GNETLIB	Net Library (GALILFO)	Open	Non Circulating
7 MICROFILM2	Microform Periodicals and Newspapers	Open	Non Circulating
MICROFORM1	Microform Area ast Floor	Open	Non Circulating
19 ORIMER	Lorimer Reading Rooom	Open	Stacks
20 ILLOFFICE	ILL Office	Open	Non Circulating

#### Your Patron Groups are still there



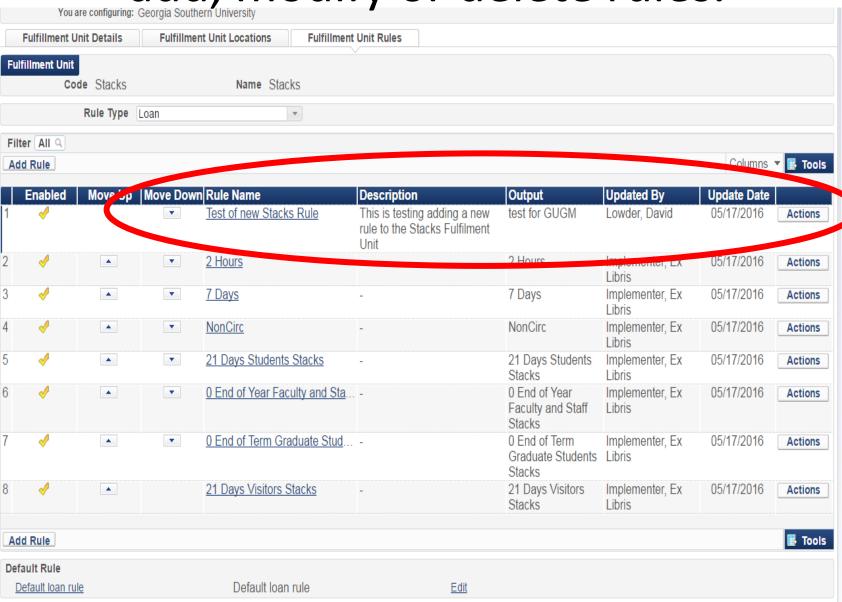
## Your Item Types are still there



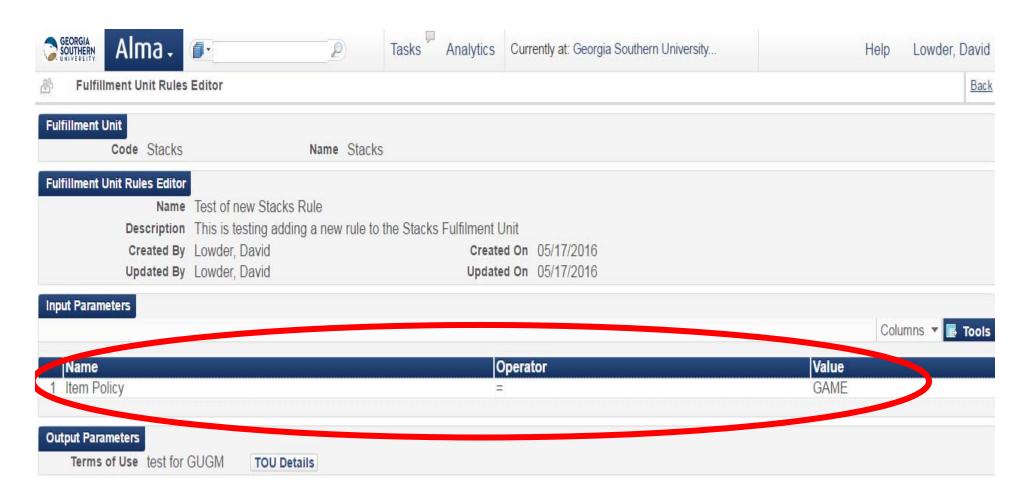
The configuration form is used to build the rules for each Fulfillment Unit. A rule is created for each Patron Type and a rule for each Item

Fulfillment Tables	
Select one of the suggested values from the	e drop down list or insert a required value manually.
Location Types	On Shelf Request Policy
Stacks	Request for pickup anywhere regardless of availability
Hourly Loans	No Requesting
Daily Loans	No Requesting
Media and Equipment	No Requesting
Non Circulating	No Requesting
Patron Types	
Faculty and Staff Graduate Students	
Students Students	
Visitors	
Item Exception Types	
NonCirc 7.Days	
7 Days	
2 Hours	

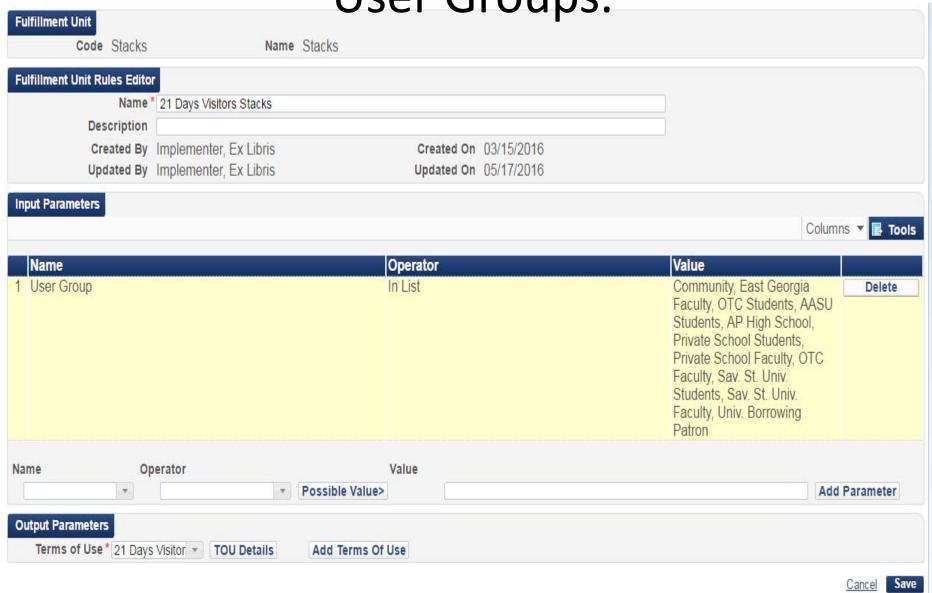
In each Fulfillment Unit you can add, modify or delete rules.



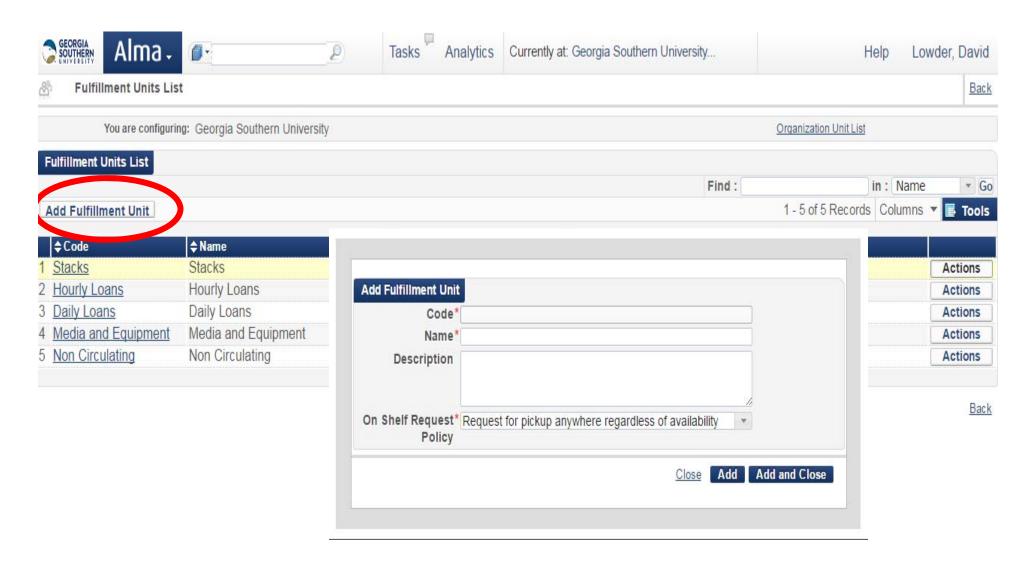
# The previous rule set would check to see if the item was a "GAME" and use special loan rules.



The Patron Type was used to build a list of User Groups.



## You can even add more Fulfillment Units



You can get pretty detailed in setting up loan rules if you need to but migration is a good opportunity to look carefully at existing practices and simplify them if possible.

I'm a happy camper now.

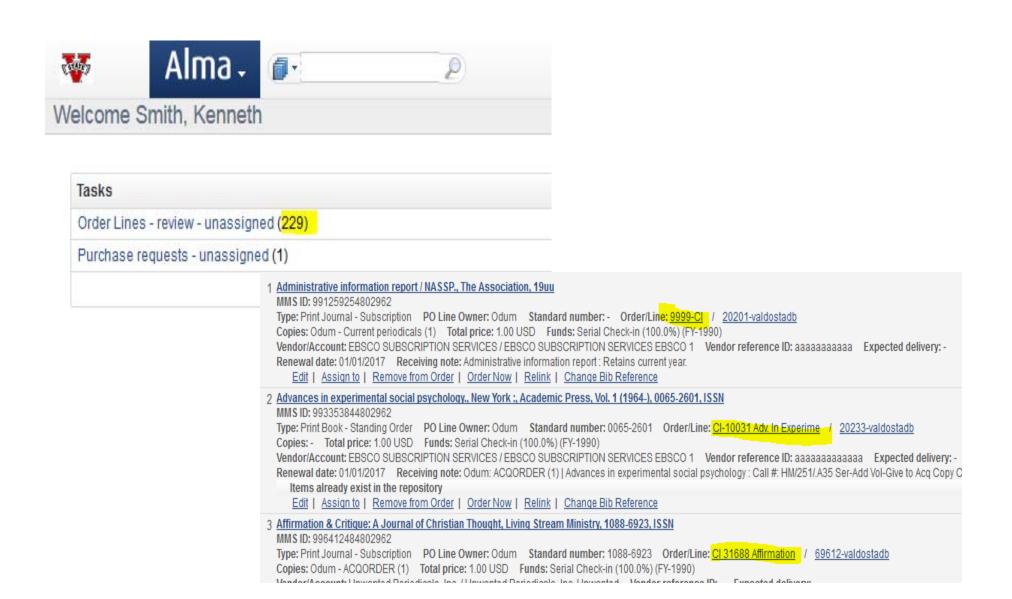
#### GIL Data Cleanup Questionnaire

1) Identify and correct any location mismatches between Holdings and Item records.

Access Queries & Pick & Scan (Voyager) to the rescue

Valdosta Wins with 65,00 location mismatch corrections

#### On First Log-in



#### 1 Speculum.

Journal By Mediaeval Academy of America. (Cambridge, Mass., Mediaeval Academy of America v. 1- Jan. 1926-)

Library: Odum Permanent Location: Current periodicals

Call Number: Shelved Alphabetically by Title Call Number Type: Other scheme

Status: Item in place Item Policy: Serial Hldgs UB Nonavail Barcode: ISSitm934.10-valdostadb Material Type: Issue Description: v. 75. no. 4 (2000 Oct.)

Edit | Holdings | Items | Request | Work Order | Withdraw | More info

#### 2 Speculum.

Journal By Mediaeval Academy of America. (Cambridge, Mass., Mediaeval Academy of America v. 1- Jan. 1926-)

Library: Odum Permanent Location: Current periodicals

Call Number: Shelved Alphabetically by Title Call Number Type: Other scheme

Status: Item in place Item Policy: Serial Hidgs UB Nonavail Barcode: <u>ISSitm934.160-valdostadb</u> Material Type: Issue Description: v. 79, no. 3 (2004 July)

Edit | Holdings | Items | Request | Work Order | Withdraw | More info

#### 3 Speculum.

Journal By Mediaeval Academy of America. (Cambridge, Mass., Mediaeval Academy of America v. 1- Jan. 1926-)

Library: Odum Permanent Location: Current periodicals

Call Number: Shelved Alphabetically by Title Call Number Type: Other scheme

Status: Item in place Item Policy: Serial Hidgs UB Nonavail Barcode: ISSitm934.280-valdostadb Material Type: Issue Description: v. 82, no. 3 (2007 July)

Edit | Holdings | Items | Request | Work Order | Withdraw | More info

#### 4 Speculum.

Journal By Mediaeval Academy of America. (Cambridge, Mass., Mediaeval Academy of America v. 1- Jan. 1926-)

Library: Odum Permanent Location: Current periodicals

Call Number: Shelved Alphabetically by Title Call Number Type: Other scheme

Status: Item in place Item Policy: Serial Hldgs UB Nonavail Barcode: ISSitm934.220-valdostadb Material Type: Issue Description: v. 81, no. 1 (2006 Jan.)

Edit | Holdings | Items | Request | Work Order | Withdraw | More info

#### 5 Speculum.

Journal By Mediaeval Academy of America. (Cambridge, Mass., Mediaeval Academy of America v. 1- Jan. 1926-)

Library: Odum Permanent Location: Current periodicals

Call Number: Shelved Alphabetically by Title Call Number Type: Other scheme

Status: Item in place Item Policy: Serial Hidgs UB Nonavail Barcode: ISSitm934.260-valdostadb Material Type: Issue Description: v. 82, no. 1 (2007 Jan.)

Edit | Holdings | Items | Request | Work Order | Withdraw | More info

#### 6 Speculum.

Journal By Mediaeval Academy of America. (Cambridge, Mass., Mediaeval Academy of America v. 1- Jan. 1926-)

Library: Odum Permanent Location: Current periodicals

Call Number: Shelved Alphabetically by Title Call Number Type: Other scheme

Status: Item in place Item Policy: Serial Hldgs UB Nonavail Barcode: <u>ISSitm934.320-valdostadb</u> Material Type: Issue Description: v. 83, no. 3 (2008 July)

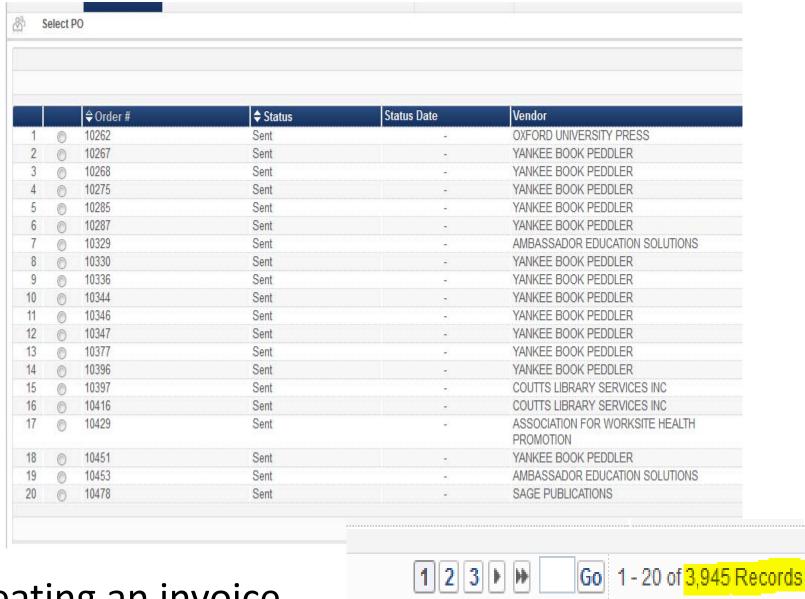
Edit | Holdings | Items | Request | Work Order | Withdraw | More info

7 Consulus



Search results for the journal "Speculum.

"



Creating an invoice from a PO: Select PO (*If* vou Can)

#### On the Happy Path to an Alma Future

#### Questions and Answers