

Appendix B from [Getting Ready for Alma and Discovery Implementation](#)

Appendix B – Optional Data Preparations

Yellow highlight is for session 1; **green highlight** is for session 2

Blue font is added text for session 1; **green font** is added text for session 2.

As you prepare for migration to Alma and Discovery, Ex Libris recommends that your institution take advantage of the opportunity to perform some data clean up. While completely optional, undertaking some data clean-up efforts will improve the migration process and provide the best possible outcome as you make the transition to Alma and Discovery.

The following are a number of recommendations that we have gathered during the past several years. Not all of these cleanups must be done now – many can be done in Alma later.

- Library and collection/location

Identify which of your sublibraries in Aleph (tab_sub_library types 1 and 4) are not an actual active library. Combine rarely used sublibraries into other existing sublibraries. Create unique collection and location names for each library in Alma and Discovery.

- Bibliographic, holdings, and item data

- Fix bibliographic records that do not have a 245/title
- Identify links pointing to existing source systems that are migrated, so that they can be removed or updated, if necessary.
- Review non-standard MARC fields (alphanumeric, for instance), revising records as appropriate. Note that migration allows mapping to local 9XX fields.
[Discuss OWN, CAT, etc.](#)
- Identify and delete duplicate Bibs. [Discuss OWN](#)
- Identify and clean up invalid Unicode characters
- Identify and re-barcode any duplicate or unintentionally empty item barcodes. In Alma, duplicate barcodes are not supported and non-barcode items, although supported, cannot circulate in Alma.
- Consolidate multiple holding records for identical item copies for the same location/call number.
- For certain ILSs, identify and correct any location mismatches between holdings and item records. Not doing so may result in multiple holdings records, particularly if the mismatch represents a permanent location in the item record different than the permanent location in the holdings record.
- Assign a value for empty collection/location for items/holdings, if applicable. [See article Alph to Alma migration: HOL record lacks 852 field](#) .
- Since the NUC/OCLC code is associated at the library-level when publishing to OCLC or Libraries of Australia, if there are different owner codes needed for inventory in the same library, consider separating the

inventory to different library owners before implementation.

- **Enumeration and Chronology in Items/Issues**

Items/issues may have a description field such as ‘Vol. 1, No 6 (June 2015)’. This description field will be used to sort items/issues in Alma (for staff) and Discovery (for the end-user).

If the descriptions are dissimilar, the sorting may be off. All of the items will still be present and viewable, but if there are many items on the same record, it may be difficult for someone to find the item in a sorted list.

Example of items that may sort incorrectly:

Vol. 1 No. 1 (January 2017)

V1 N2 (February 2017)

March 2017 – V1 N3

Vol. 1 No. 4 (April 2017)

The “Aleph to Alma Migration Guide” says:

Item description field for serials: In Aleph, the Item Descriptions field (Z30-DESCRIPTION) for serials and multi-volumes contains both the enumeration and chronological description of the item. This field is migrated to an analogous field in Alma. Enum and Chron information of the items are mapped to Alma item Enum and Chron. See [Appendix B – Optional Use of Aleph Fix Routines During Migration](#) for additional

possibilities related to serial summary holdings and Aleph routines.

- **Statuses and codes**
 - Standardize statuses and codes to remove extraneous entries and consolidate them into fewer options.
 - Review and reduce purchase order statuses, if this is applicable.
 - Review and consolidate material types for items (for example, BK, Book, Monograph)
- **Old/inconsistent data**
 - Clean up and/or purge patron records that are inactive or expired and have no outstanding items, fines, fees, or other transactions.
 - Clean up and/or purge patron records with fines, fees, or other transactions that are older than a certain date and/or less than a certain amount.
 - Clean up and/or remove purchase orders that are old drafts or tests.
 - Clean up and/or remove invoices that are old drafts or tests.
 - Clean up standing orders and subscriptions that are old, should have been closed, or require investigation when active, but have been inactive for years.
 - Clean up or standardize currency codes for vendors, funds, orders, or invoices that are not standard per the ISO standards for currency.
 - Clean up or standardize country codes for patrons or vendors that are not standard per the ISO standards for countries.
- **E-resources and package resources**

Establish clear categorization of e-resources and electronic-package and database resources in your source ILS system. For example, organize electronic records by location, library, local field, or otherwise distinguishable manner.

Mark PDA BIB records clearly so that they can more easily be found in Alma and marked for PDA workflows in Alma and Discovery post-migration. Use KB interface names for electronic interfaces to make use of the Community Zone in the best possible manner.

Categorize vendor provider indications on electronic records. For example, some sites use the 856 \$n or other 856 subfields to consistently store the electronic vendor name providing electronic access. This can be optionally used to display end-to-end users for local e-resources.

- Patron, vendor, library contact names

Establish how name fields are stored (Last name, First Name, or First Name/Last Name) when names are entered in one field in the source ILS system.

Ensure that all patrons have unique identifiers.

Duplicate identifiers are not valid in Alma. [See the article Evaluating patron IDs for choice of Alma primary patron ID](#).

- Naming conventions

Standardize how country information is entered such USA, U.S.A., United States, etc. for patron, vendor, and library contact information.

Consider standardizing other fields such as St. or Street, Ave. or Avenue for patron, vendor, and library contact information.

- Library and collection/location names

Create/ensure unique collection/location names for each library that will be established in Alma and Discovery

- Authority records

Identify local authority records, if relevant (keeping in mind the Alma CZ will have various national authorities automatically available globally). When relevant, these can be loaded post Go-Live using standard Alma loading tools.