

Generic Alma Data Delivery Specifications

This migration document is intended to be used by customers who are coming from a legacy ILS (Integrated Library System) which will not be supported as a standard migration procedure by the Alma Migration Team. Customers are expected to provide extracts for their inventory and fulfillment data, and map them into generic Alma fields using this guide and the [Generic Field Mapping](#) form.

The procedure for migrating from a legacy ILS to Ex Libris' Alma consists of the following steps:

1. Indicate which local fields correspond to Ex Libris' expected fields using the Generic Field Mapping form, prior to data delivery (customer responsibility).
2. Validate the flat files using [Non-Ex Libris to Alma Validation Tool](#) Excel. It is recommended that this step be done against a small sub-set of data to ensure that the header of each of your flat files and the filled in [Generic Field Mapping](#) form match each other.
3. Extract the relevant data elements from the ILS into flat files (customer responsibility).
4. Upload the files to Ex Libris' FTP server along with the [Generic Delivered Files](#) form and the executed/validated [Non-Ex Libris to Alma Validation Tool](#) (customer responsibility).
5. Transform the data elements, based on the Field Mapping form, into an intermediate conversion XML format (Ex Libris responsibility).
6. Load the transformed data into Alma (Ex Libris responsibility).

Deliver the [Generic Field Mapping](#) and validated data validation output form to Ex Libris along with the [Generic Migration Form](#) prior to the actual delivery of the data. The lead time depends on your project schedule. Provide the [Generic Delivered Files](#) form, which lists the file names and the record counts for each file, at the same time that you provide your data extract files.

Provide the data elements in flat files, and place them on an Ex Libris FTP server. Prepare the data files in the exact format as specified in [Appendix A – FTP Drop Point Delivery and Delivered Files Form](#) with the naming conventions as described there.

Files Requested from your ILS

Ex Libris expects a certain set of files to be exported from the incoming ILS, listed below. As files are extracted, be sure that the extracted file description, such as data elements and lengths, matches the description in [Expected File Formats](#).

The data elements listed are those that Ex Libris expects to use in conversion. Not all data elements that exist in the local ILS are necessary to transfer to Alma.

The scope of your specific conversion is agreed upon in your Alma contract.

Note

- As you extract data from any area listed below, provide it to Ex Libris via an FTP connection. This facilitates the
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transformation analysis and expedites the conversion process. For FTP delivery instructions, see [Appendix A – FTP Drop Point Delivery and Delivered Files Form](#).

- DO NOT OPEN/UPDATE any delimited file extracts you provide to Ex Libris in Excel. This may ruin the appropriate delimiter formatting and text formatting and may result in corrupted data.

Expected File Formats

All the files listed in the tables below are expected in CSV format with one record per line, and fields delimited by commas and multi-values within fields delimited by semicolons. The following is an example of a record with multiple values for the third field:

```
"field1","field2","field3a";"field3b","field4"
```

The following are the only exceptions to this expected format:

- Bibliographic records (which are MARC standard files)
- MARC Holdings records

For all files, the maximum file size is 2GB.

Dates can be in any format, but they must be consistent. Do not use YYYYMMDD and then MMDDYYYY in the same file.

Generic Field Mapping Form

Prior to submitting your extracted files, complete the Generic Field Mapping form. Indicate which data elements (files) you plan to provide in the **Overview** tab of the spreadsheet. On the subsequent tabs, indicate your local field names and how they map to Alma's expected field names.

On all of the tabs in the [Generic Field Mapping](#) form, there is a **##Foreign Key##** column. Customers should not fill out this column – it is for internal use only. In addition, there are various note fields for each data element. Fields that are not expected by Ex Libris (because there is no functional place for the data element in the corresponding Alma data structure) can be placed in a note in the record. Specify the note type that you want the field to go to at the bottom of each tab in the [Generic Field Mapping](#) form.

Generic Delivered Files Form

At the time you submit the requested data files, submit the completed Excel spreadsheet [Generic Delivered Files](#) form. List the files, record counts, and encoding for each file delivered to the FTP server.

Inventory

Bibliographic Records

Bibliographic records are expected in MARC, UNIMARC or KORMARC format. Binary MARC, UNIMARC or KORMARC is preferred, but Ex Libris also accepts files in MARCXML, UNIMARCXML or KORMARCXML format as well. The character encoding expected is UTF-8 or ANSEL/MARC8. If your library prefers to export in a different format, inform your Ex Libris project manager. All files should be delivered with the same character encoding.

Each Bibliographic record MUST have a single unique source key/identifier in a consistent single source MARC/UNIMARC/KORMARC field. Records which do not conform will be rejected.

The following sections explain additional bibliographic use-cases which are supported.

Suppressed Records

Suppressed records are those bibliographic records that you want to have in the database, but not show to the public. Examples of this are:

- titles on order
- missing or damaged titles where you want to keep the record but not show it to the public
- titles that are for internal management only, such as equipment

Provide a text file that contains the source BIB key/ID, one key per line, for bibliographic records that are suppressed.

Boundwiths

If your ILS allows a single item to be linked to multiple bibliographic records, provide Ex Libris with information on how that is indicated by providing a list of bibs that share the single item.

Examples of boundwiths:

- Bound journals with a title change in the middle of the year. For example, if January – April is “Journal of Mathematics Education” and May – December is “Mathematics Educator”, and all 12 of the issues are bound in the same volume with a single barcode.
- Pamphlets or small volumes with similar content which were combined into the same item/barcode, either by binding or in a folder.

Provide boundwith information in a separate file as follows:

```
bib ID (host), bib ID, bib ID etc
```

```
456,457,458,459
```

In the above example, bib 456 has the shared item attached to it. The other bib IDs in the line are bound with the shared item. Since Alma supports standard bibliographic record relationships using Marc 21/UNIMARC/KORMARC linking fields at the bib level, the migration processing associates this shared item by linking the sharing bibliographic records via the standard linking fields. Therefore, the actual item that is shared is not necessary for migration processing.

Linked Bibliographic Records

If you use standard 7XX fields for linking between MARC/KORMARC bibliographic records (or standard linking fields for

UNIMARC), they are leveraged during migration and create appropriate bibliographic-level linking in Alma.

No exported files are necessary for this category: use the migration form, Questionnaire tab, to indicate if your bibliographic records contain linking fields.

Electronic Link Resolver Records

If you have SFX MARCIt records or equivalent electronic records in your ILS that are also represented by your link resolver system, it is suggested that they be excluded from the data provided to Ex Libris to avoid unnecessary duplication with the link resolver system data. If these records are NOT removed, you will likely see a record in Alma migrated from the ILS and the same record migrated from SFX.

An exception to this is if the records have active orders or physical inventory that are also being migrated, these records should be kept. If you choose to provide a string to indicate records to be removed/not migrated, the migration programs remove records with no attached orders or inventory and keep records with attached orders and items.

No exported files are necessary for this category: use the **Questionnaire** tab of the migration form to indicate a string that will be checked in the 035 field. Example: '(SFX)'.

Holding Records

MARC Holdings

If MARC holdings are provided, each record MUST have a single unique source identifier in a consistent single source MARC/UNIMARC/KORMARC field as well as a valid unique bibliographic identifier in order to link it to its correct bibliographic record. Records that do not conform are rejected.

Non-MARC Serial Holdings

If non-MARC serial holdings are provided, they should be sent as a CSV file. The file can be mapped to the generic serial holdings format included in the **Holdings** tab of the [Generic Field Mapping](#) form.

The following format is used for a generic serial holding record in CSV format. Records should be provide one record per line, with quotes and commas. Provide a header at the top. If something is allowed to be repeatable, provide the repeated information with a semicolon.

MARC Holdings

Expected Field Name	Repeat-able?	Notes
BIB_KEY	N	Mandatory. Links to the related bib record
SERIAL_KEY	N	
LOCATION	N	Mandatory. 852 \$b
LIBRARY	N	852 \$c
SUMMARY_STATEMENT	Y – SUMM	

Expected Field Name	Repeat-able?	Notes
	group	
SUMM_TYPE	Y – SUMM group	SUMM_TYPE can be one of: 866, 867, 868, 856u or 856z. The SUMMARY_STATEMENT will be placed in that tag in the newly-created MARC holding record.
SUMM_PUBLIC_NOTE	Y – SUMM group	will go into the \$z of SUMM_TYPE tag
SUMM_NON_PUBLIC_NOTE	Y – SUMM group	will go into the \$x of SUMM_TYPE tag
PUBLIC_NOTE	Y	will go into \$z of 952
NON_PUBLIC_NOTE	Y	will go into \$x of 952
CALL_NUMBER	N	852 \$h
SHELVING_SCHEME	N	852 first indicator; provide in format specified here http://www.loc.gov/marc/holdings/hd852.html ; type 7 not supported on migration

Holding Records from a Summary Statement in a Bibliographic Record

If the customer has serial holdings which are only represented by a summary statement such as Vol. 1 (1980) – Vol. 21 (2000), these statements should be included in a tag in the bibliographic record. Use the **Holdings** tab of the [Generic Field Mapping](#) form to indicate which field and subfield contents to use for generating holdings records from summary statements embedded in the bibliographic record.

Fill in the values of the following fields in the **Holdings** tab of the [Generic Field Mapping](#) form. If the SUMM_LOC_CODE matches an existing holdings record on the same bibliographic record, even a holdings record that was generated from items attached to the same holdings record, then the summary holdings statement is attached to that holdings record, regardless of call number. In other words, the summary holdings is placed on the holdings record with the same location, even if 852_SUBFIELDS_FOR_HOL contains call number subfields for matching like bchi. If there is no existing holdings record on the bibliographic record with the same location, a new holdings record is generated.

Holding Records from a Summary Statement in a Bibliographic Record

Expected Field Name	Value	Notes
SUMM_TAG		Five characters; tag+2 indicators. May use # as wildcard, for example, 866##
SUMM_SUBFIELDS		Multiple subfields allowed, for example, abz. May use # to indicate all subfields.
SUMM_CALLNO		Textual call number to be used in all newly generated holdings records, if desired.
SUMM_LIB_SUBF		A single subfield code (like 'a') which contains a library code in local ILS format. DO NOT enter a different bib

Expected Field Name	Value	Notes
		tag: the migration program searches for a subfield within the SUMM_TAG BIB tag.
SUMM_LOC_SUBF		A single subfield code (such as a) that contains a location code in local ILS format. Do NOT enter a different bib tag: the migration program searches for a subfield within the SUMM_TAG BIB tag.
SUMM_LIB_CODE		If SUMM_LIB_SUBF is not provided or the subfield is not found, this is used for all records as a default. Provide a library code in local ILS format.
SUMM_LOC_CODE		If SUMM_LOC_SUBF is not provided or the subfield is not found, this is used for all records as a default. Provide a location code in local ILS format.
SUMM_PUBLIC_NOTE_SUBF		Public note, is placed in 852 \$z of the generated holding record.
SUMM_NON_PUBLIC_NOTE_SUBF		Non-public note, is placed in 852 \$x of the generated holding record.

Item Records

Ex Libris expects item records in one of two formats:

- CSV delimited format. Items that do not have a BIB key are not migrated.
- Item field data which are embedded in bibliographic tags in the BIB extract.

Suppressed Item Records

All suppressed item records are migrated to Alma as regular items (not suppressed). However, specific locations can be marked as suppressed in Alma so that groups of items can be suppressed from public view.

Holding Record and Item Record Relationship

If your system has MARC holding records and related item records, indicate the holding key in the item record file.

If your ILS does not store holding information in MARC/UNIMARC/KORMARC format or if not all inventory records have a holding record, for example, if serials records have a MARC/UNIMARC/KORMARC holding record but monograph records do not, then Ex Libris generates holdings for the items based on the item information provided.

See the 852_subfields_for_hol section in the [Generic Alma Migration Guide](#) for more information about how to determine how item records can be grouped when generating holding records.

Embedded Item Record

If the item record is embedded in the bibliographic record, for example in a 949 tag, you may use the **Items** tab on the [Generic Field Mapping](#) form. Indicate the tag (for example, 949) that contains the embedded item.

Then, place the subfield code in the [Generic Field Mapping](#) form in the appropriate field, for example:

LIBRARY \$m

LOCATION \$n

ITEM_CALL_NO \$c

Item Record

The following format is used for a generic item record in CSV format. Records should provide one record per line, with quotes and commas. Provide a header at the top. If something is allowed to be repeatable, provide the repeated information with a semicolon.

Item Record

Expected Field Name	Repeatable	Notes
BIB_KEY	N	Mandatory. If no BIB key is provided, the item is rejected.
ITEM_KEY	N	May be used to link to other files such as fines, loans, and requests.
HOL_KEY	N	If you are providing MARC holdings files, include linked holding record ID here.
LIBRARY	N	Higher level of location or single location. If your previous ILS has only one level of location, use this field only and leave location blank. Used in the Alma Location tab of the <i>Alma Migration Form</i> .
LOCATION	N	Lower level of location. If your previous ILS has only one level of location, leave this field blank and use the LIBRARY field only. Used in the Alma Location tab of the <i>Alma Migration Form</i> .
ITEM_CALL_NO	N	If your call number has multiple subfields such as \$h and \$i, provide them in two different fields separated by a semicolon, for example, "PN 456",".J123". Otherwise provide a string, for example, "PN 456 .J123"
SHELVING_SCHEME	N	Shelving scheme for call number. Use the Shelving Scheme map in the <i>Alma Migration Form</i> .
COPY_NO	N	numeric
BARCODE	N	alphanumeric, and unique or empty
ITEM_TYPE	N	May be used in conjunction with Patron Type to determine how an item circulates. For example: "4weekLoan" or "Book". Use Item Type map in the Generic Migration Form .
STATUS	N	Special status for an item, such as MISSING or BINDERY. Use Item Status map in the <i>Alma Migration Form</i> .
MATERIAL_TYPE	N	Use the Item Material Type map in the migration form.
TEMP_LIBRARIY	N	Temporary Library
TEMP_LOCATION	N	Temporary Location
TEMP_ITEM_	N	Temporary Item Type

Expected Field Name	Repeatable	Notes
TYPE		
TEMP_CALL_NUMBER	N	Temporary Call Number
TEMP_CALL_NO_TYPE	N	Temporary Call Number Type
ALT_CALL_NO	N	Item Call Number
ALT_CALL_NO_TYPE	N	Item Call Number type
DATE_LAST_RETURN	N	Date of last return from loan. To see this value in Alma, search for the item under 'Physical Items' and on the results list click 'Other details'.
NO_LOANS	N	Number of loans total for this item. To see this value in Alma, search for the item under 'Physical Items' and on the results list click 'Other details'.
DATE_LAST_INHOUSE_USE	N	Date of last in house use. To see this value in Alma, search for the item under 'Physical Items' and on the results list click 'Other details'.
NO_INHOUSE_USE	N	Number of total in house uses for this item. To see this value in Alma, search for the item under 'Physical Items' and on the results list click 'Other details'.
INVENTORY_NUMBER	N	
INVENTORY_DATE	N	
IS_MAGNETIC	N	Y or N
STORAGE_LOCATION_ID	N	
PIECES	N	
PAGES	N	
ARRIVAL_DATE	N	Date item was received (usually used for serial items)
EXP_ARRIVAL_DATE	N	Date item is expected (usually used for unreceived serial items)
DESCRIPTION	N	Enumeration and Chronology in display format, for example "Vol. 1 (1980) – Vol. 21 (2000)"
ENUM_A	N	1 st level of enumeration
ENUM_B	N	3 rd level of enumeration
ENUM_C	N	4 th level of enumeration

Expected Field Name	Repeatable	Notes
ENUM_D	N	5 th level of enumeration
ENUM_E	N	6 th level of enumeration
ENUM_F	N	7 th level of enumeration
ENUM_G	N	8 th level of enumeration
ENUM_H	N	9 th level of enumeration
CHRON_I	N	1 st level of chronology
CHRON_J	N	2 nd level of chronology
CHRON_K	N	3 rd level of chronology
CHRON_L	N	4 th level of chronology
CHRON_M	N	5 th level of chronology
CREATE_DATE	N	
CREATE_OPER	N	
UPDATE_DATE	N	
UPDATE_OPER	N	
REPLACEMENT_COST	N	Place an amount here ONLY IF this will be used as an actual replacement cost for a lost item in Fulfillment.
INVENTORY_PRICE	N	Place an amount here for information purposes about the original cost of the item.

Any additional fields not listed above may be put into notes. The possible note fields in Alma items are listed in the following chart in the **Note Name** column. The fields listed in the **Default Local Field** column are those that are expected by Ex Libris. If you use other field names or have fields that you want to include in the migration but are not expected by Ex Libris, you can rearrange, add, or subtract fields on the right, as necessary. If you want to include multiple local fields in the same Alma note, make as many copies of the line in the spreadsheet as needed for all note name/local field combinations.

Note Name	Default Local Field
PUBLIC_NOTE	Shows to the public
FULFILMENT_NOTE	Pops up at circulation activity.
NON_PUBLIC_NOTE_1	Internal notes

Note Name	Default Local Field
NON_PUBLIC_NOTE_2	
NON_PUBLIC_NOTE_3	
STAT_NOTE_1	Statistical notes
STAT_NOTE_2	
STAT_NOTE_3	

E-Resources Indication (P2E)

Provide a list of bibliographic system numbers that represent electronic resources and an indication if these electronic resources are portfolios, packages, or database resources. Prepare the list as a comma separated text file containing lines that represent each e-resource. Structure each line as follows:

<bibnumber>,<resource type>

For example:

b000000001,Portfolio

b000000002,DB

b000000003,Package

Note that the words `portfolio`, `package`, and `db` are not case-sensitive, therefore both `portfolio` and `Portfolio` are acceptable.

Fulfillment

Patrons

Ex Libris expects patron records in CSV delimited format. Patron records without a record key identifier are skipped, since this is the minimum required patron information. The record key identifier is used to link the patron to other records such as loans and fines.

The following fields are expected. Indicate the local field names for the expected fields in the **Patrons** tab of the [Generic Field Mapping](#) form.

Patrons

Field Name	Repeat-able?	Notes
ORIGINAL_ID	N	Used to link to loans, fines, requests. This is mandatory even if there are no loans, fines, or requests to link to. If there is no original ID in your patron file, use another identifier such as barcode.
EXPIRY_DATE	N	if empty, migration fills in with conversion date + 1 year

Field Name	Repeat-able?	Notes
LANG	N	Use User Language map in migration form
FIRST_NAME	N	
LAST_NAME	N	
MIDDLE_NAME	N	
USER_TITLE	N	
JOB_TITLE	N	
USER_GROUP	N	Use the User Group map in the migration form.
BIRTH_DATE	N	
PURGE_DATE	N	if empty, migration fills in with expiration date
GENDER	N	Male, female or other
CAMPUS_CODE	N	Use the Campus Code map in the migration form.
CREATE_DATE	N	
MODIFICATION_DATE	N	Global will use DATE_FORMAT
CREATED_BY	N	
MODIFIED_BY	N	
<p>If a single block is provide per single patron record, use these block fields here. Else, if multiple blocks are provided for a single patron, then use a separate block file. See the section below "User Blocks (if multiple blocks per patron)"</p>		
BLOCK_TYPE	N	Use the User Block tab in the migration form.
BLOCK_NOTE	N	
BLOCK_CREATE	N	If this is not present, migration will use use patron create date, then patron migration date.
BLOCK_EXPIRY	N	
<p>The following four fields are only used if two or more institutions are migrating to Alma as a consortium. These fields are used to link patron records between institutions when the two patron records represent the same person. The Master patron record is for the patron's home institution. The Copy record is a copy of the record so that the patron can borrow at other related institutions.</p>		
LINKED_ACCOUNT	N	false = this record is the MASTER record true = this record is a COPY record
LINKING_ID	N	mandatory for MASTER record. Unique ID of record
SOURCE_LINK_ID	N	mandatory for COPY. MASTER's Unique ID

Field Name	Repeatable?	Notes
SOURCE_INST_ID	N	mandatory for COPY. MASTER's institution. Use the Alma institution code here

User Identifiers

There can be a number of fields in the patron record that are user identifiers. The types of identifiers that are available for migration into Alma are listed in the left column. Enter fields from your institution's patron extract that include identifiers. The values in the left column cannot be changed. Use the values in the left column to select the appropriate primary identifier in the **Questionnaire** tab of the [Generic Migration Form](#).

Note

All patron primary identifiers MUST be unique across all users, as required by Alma. If they are not, the migration program disambiguates them.

User Identifiers

Alma Identifier Type	Migration Form Value
UNIV_ID	UNIV_ID
BAR	BAR
ADDL_ID_1	ADDL_ID_1
ADDL_ID_2	ADDL_ID_2
ADDL_ID_3	ADDL_ID_3
ADDL_ID_4	ADDL_ID_4

User Preferred Address

There may be a number of addresses, phone numbers, and email addresses in the patron record. You may decide which addresses, phone numbers, or email addresses are the preferred ones in Alma. If the preferred entry is empty, the secondary one is preferred.

Additionally, select a type for each address, phone, or email. All can be selected so that the address, phone, or email can be used as any type.

User Preferred Address

Address Field	Repeatable?	Instructions
ADDRESS_LINE_1	Y	
ADDRESS_LINE_2	Y	

Address Field	Repeatable?	Instructions
ADDRESS_LINE_3	Y	
ADDRESS_LINE_4	Y	
ADDRESS_LINE_5	Y	
ADDRESS_CITY	Y	If city, state, zip and country are all together on one line, you can put them into one of the ADDRESS_LINE_x fields
ADDRESS_STATE	Y	
ADDRESS_CODE	Y	Postal code
ADDRESS_COUNTRY	Y	Migration programs make no attempt to standardize this country name/code. If country is provided, it must be a three-letter ISO country code, which can be found here https://en.wikipedia.org/wiki/ISO_3166-1_alpha-3
ADDRESS_NOTE	Y	
ADDRESS_START	Y	Date
ADDRESS_END	Y	Date
ADDRESS_TYPE	Y	Select one: HOME, WORK, SCHOOL, ALTERNATIVE, ALL
PHONE	Y	
PHONE_TYPE	Y	Select one: Home, Mobile, Office, OfficeFax, All
EMAIL	Y	
EMAIL_TYPE	Y	Select one: Personal, School, Work, All

User Statistical Categories

There may be a number of fields in the patron record that function as a statistical category only, for example, a student's department or major. The way the student borrows can be determined by the User Group, but you may want to track the department, so that you can get more detailed statistics on how Law students borrow, for example. Since various ILS systems have different fields for tracking statistical categories, we provide you the option to map the data from any field in your local ILS to the User Statistical Categories in Alma.

User Statistical Categories

User Statistical Category	Local Field Name	Field Label
USER_STAT_CATEGORY		SCHOOL:
USER_STAT_CATEGORY		DEPT:
USER_STAT_CATEGORY		

Up to 10 incoming fields can be mapped. To map the values, use the UserStatCategories map in the [Generic Migration Form](#). If a value is not found in the map, it is migrated as is. If you use a label, the userStatCategory map tries to map the field including the label. The first column in the userStatCategory map would be: LABEL:value, for example: SCHOOL:Law. The migration program does not provide a colon; if you want a colon for easier management, put one in the label as above.

Notes

Any additional fields not listed above may be put into notes. The possible note fields in Alma items are listed in the following chart in the **Note Name** column. The fields listed in the **Default Local Field** column are those that are expected by Ex Libris. If you use other field names or have fields that you want to include in the migration but are not expected by Ex Libris, you can rearrange, add, or subtract fields on the right, as necessary. If you want to include multiple local fields in the same Alma note, make as many copies of the line in the spreadsheet as needed for all note name/local field combinations.

Notes

Note Name	Information
LIBRARY_NOTE	
BARCODE_NOTE	
ADDRESS_NOTE	
OTHER_NOTE	OTHER_NOTE is set as userViewable by the migration programs

User Blocks (if multiple blocks per patron)

If you will be sending multiple blocks for a single patron, then provide the blocks in a separate csv file.

Address Field	Instructions
PATRON_ID	There may be multiple lines in the file for a single patron ID - meaning that the patron has multiple blocks.
BLOCK_TYPE	Use the User Block tab in the migration form.
BLOCK_NOTE	
BLOCK_CREATE	If this is not present, migration will use use patron create date, then patron migration date.
BLOCK_EXPIRY	

Loans/Circ Transactions

Extract only current circulation transactions.

Provide the loan files in comma delimited format. The following fields are expected. Use the **Loans** tab of the [Generic Field Mapping](#) form to indicate local field names for the expected fields.

Loans/Circ Transactions

Field Name	Repeatable?	Notes
DATE_HOUR_OUT	N	date+time
DATE_HOUR_DUE	N	date+time
PROCESS_STATUS	N	Normal, Recall, Renew, Lost, Claimed_Return
ITEM_ID	N	Customers may fill in one or the other, or both. At least one is mandatory.
ITEM_BARCODE	N	
USER_ID	N	Mandatory; links to patron ORIGINAL_ID
ORIGINAL_DUE_DATE	N	date+time
RENEWAL_DATE	N	date+time
RECALL_DATE	N	date+time
UPDATE_DATE	N	
CREATE_ID	N	
UPDATE_ID	N	

Any additional fields not listed above may be put into notes. The possible note fields in Alma items are listed in the following chart in the **Note Name** column. The fields listed in the **Default Local Field** column are those that are expected by Ex Libris. If you use other field names or have fields that you want to include in the migration but are not expected by Ex Libris, you can rearrange, add, or subtract fields on the right, as necessary. If you want to include multiple local fields in the same Alma note, make as many copies of the line in the spreadsheet as needed for all note name/local field combinations.

Note Name	Default Local Field
NON_PUBLIC_NOTE	

Requests/Holds

Extract only those hold requests where the item is waiting on the hold shelf for pickup.

Provide the request files in comma delimited format. The following fields are expected. Indicate the local field names for the expected fields on the **Requests** tab of the [Generic Field Mapping](#) form.

Field Name	Repeatable?	Notes
ITEM_IDENTIFIER	N	One or the other of ITEM_IDENTIFIER or ITEM_BARCODE is required, but not both

Field Name	Repeatable?	Notes
ITEM_BARCODE	N	
USER_IDENTIFIER	N	links to ORIGINAL_ID in patron file
PICKUP_LIBRARY	N	will be sent through Alma Location Map
REQUEST_DATE	N	Date hold request was initiated
EXPIRATION_DATE	N	Date hold request will expire
HOLD_DATE	N	Date item was placed on hold shelf
CREATE_DATE	N	
UPDATE_DATE	N	
CREATE_ID	N	
UPDATE_ID	N	
LIBRARY_ID	N	Sent through Alma Location Map

Any additional fields not listed above may be put into notes. The possible note fields in Alma items are listed in the following chart in the **Note Name** column. The fields listed in the **Default Local Field** column are those that are expected by Ex Libris. If you use other field names or have fields that you want to include in the migration but are not expected by Ex Libris, you can rearrange, add, or subtract fields on the right, as necessary. If you want to include multiple local fields in the same Alma note, make as many copies of the line in the spreadsheet as needed for all note name/local field combinations.

Note Name	Default Local Field
NON_PUBLIC_NOTE	(none)

Fines/Fees

Fine and fees information is not mandatory, but when it is provided, Ex Libris expects active fine and fee information in csv format (preferably as an outstanding active balance total in the patron CSV extract). Only active (outstanding) fine and fee information is migrated, and only the outstanding balance of each individual fine/fee; partial payment information is not preserved. The following fields are expected. Indicate the local field names for the expected fields in the **Fines/Fees** tab of the [Generic Field Mapping](#) form.

Field Name	Repeatable?	Notes
FF_PATRON_ID	N	Links to ORIGINAL_ID in patron file
FF_ITEM_ID	N	Links to Item ID in item file
FF_CREATE_DATE	N	
FF_UPDATE_DATE	N	

Field Name	Repeatable?	Notes
FF_CREATE_ID	N	
FF_UPDATE_ID	N	
FF_LIBRARY_ID	N	
FF_TYPE	N	Use the Fine Fee map in the Generic Migration Form
FF_SUM	N	Provide outstanding amount only; this may be delivered as a negative number (i.e. a credit)

Any additional fields not listed above may be put into notes. The possible note fields in Alma items are listed in the following chart in the **Note Name** column. The fields listed in the **Default Local Field** column are those that are expected by Ex Libris. If you use other field names or have fields that you want to include in the migration but are not expected by Ex Libris, you can rearrange, add, or subtract fields on the right, as necessary. If you want to include multiple local fields in the same Alma note, make as many copies of the line in the spreadsheet as needed for all note name/local field combinations.

Note Name	Default Local Field
NON_PUBLIC_NOTE	

Courses

Course information is not mandatory. If it is provided, send it in csv format, with links to bibliographic records and/or items for the reading lists. The following fields are expected. Indicate the local field names for the expected fields in the **Courses** tab of the [Generic Field Mapping](#) form.

Field Name	Repeatable?	Notes
CREATE_DATE	N	
UPDATE_DATE	N	
CREATED_BY	N	
UPDATED_BY	N	
LIBRARY_CODE	N	Same type of code that is used in LIBRARY field of item record
COURSE_CODE	N	
COURSE_NAME	N	
SECTION_CODE	N	
STATUS	N	'Active' or 'Inactive'
START_DATE	N	
END_DATE	N	

Field Name	Repeatable?	Notes
NUM_OF_HOURS	N	
TERM_CODE	Y	For example: Autumn, Winter, Spring, Yearly
UNIT_CODE	N	Use the Course Unit mapping table in the migration form if desired
UNIT_NAME	N	
FACULTY_DEPARTMENT	N	Use the Faculty Department mapping table in the migration form
NUM_OF_PARTICIPANTS	N	
EXTERNAL_ID_1	N	
EXTERNAL_ID_2	N	
EXTERNAL_ID_3	N	
INSTRUCTOR_ID	Y	Must be a patron identifier, not a name - put name strings into COURSE_NOTE below
ITEM_ID	Y	Matches item key in item file

Any additional fields not listed above may be put into notes. The possible note fields in Alma items are listed in the following chart in the **Note Name** column. The fields listed in the **Default Local Field** column are those that are expected by Ex Libris. If you use other field names or have fields that you want to include in the migration but are not expected by Ex Libris, you can rearrange, add, or subtract fields on the right, as necessary.

Note Name	Default Local Field
COURSE_NOTE	

Acquisitions

Ex Libris does not expect to receive Acquisitions information in a generic format.

Appendix A – Delivering Files and 'Delivered Files' Form

Place any data files that you provide to Ex Libris in the formats indicated in [Expected File Formats](#) on the MFT server which has been specified to you by your Ex Libris project manager.

The following is the default naming convention:

CustomerName+DataType+sequence+date+[.<file_extension>].</file_extension>

For example: centralu_bib_01_20120420.mrc, centralu_bib_02_20120420.mrc, centralu_bib_03_20120420.mrc

Ex Libris recommends a maximum of 200,000 records per MARC file, and 400,000 for other types of records (items, orders,

etc).

All records in a single file must be homogenous – all of the lines in the file must have the same number of fields, and those fields must contain the same type of data. Additionally, all of the records must be delimited in the same manner. For example, do not delimit with quotes and commas for some records and pipes for others within the same file.

Provide the [Generic Delivered Files](#) form along with the submitted files.