

Libero to Alma Migration Guide

Overview

Libero is the Integrated Library System provided by the company LIB-IT. Libero is used primarily used by libraries in Germany.

This document serves two purposes:

- A step-by-step guide to filling out the Libero Migration Form.
 - An explanation of the migration rules for Libero to Alma that do not require any customer input.
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Related Documentation

- This document is intended to complement the Libero Migration Form – an Excel spreadsheet that is read by the migration programs. It provides further information regarding the migration process and the steps required for migration to Alma.
 - Prerequisites: Basic knowledge of Alma and Libero key concepts and architecture and the requirements listed in [Getting Ready for Alma and Discovery Implementation](#).
 - The format and structure of the data exported from Libero is detailed in the corresponding document [Libero to Alma Data Delivery Specification](#). The data structure is validated with the Excel-based validation tool, also described in this document.
 - It is recommended that you view the [Introduction to the Alma Configuration Process](#) video session before completing your migration form, as the mapping and migration of libraries and locations have implications for subsequent configurations.
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Note

Ex Libris migrates your acquisitions and course data only if this service is purchased by your institution and is stipulated in your contract with Ex Libris.

Recommendations for Using this Guide

This document is divided into four areas:

- Inventory
- Fulfillment
- Acquisitions
- Physical to Electronic

Each area has the following sections:

- Questionnaire Tab – Instructions for individual questions asked on the Questionnaire tab of the Migration Form.
- Individual Tabs – Instructions for how to fill out the individual tabs on the migration form. (Examples: Alma Library Tab, User Group Tab, PO Line Type Tab).
- Further Explanation – Explanations of migration processes that need more explanation and/or do not need customer input.

We recommend that you look at the **Questionnaire Tab** section and the individual tabs in each area to assist in filling out the migration form.

If you have further questions about any of the data input or about the migration in general, see the more detailed explanations in the **Further Explanations** sections.

Inventory

Alma requires bibliographic, holdings, and item records. Data for Libero comes from two places: the bibliographic vendor BSZ provides bibliographic and serials holdings records in MARC format, and Libero provides item, fulfillment, and acquisitions information in CSV format.

The BSZ holdings records do not have a shelving location associated with them, so they are migrated as a standalone holding record attached to the bibliographic record. Ex Libris will migrate only those holding records that have a serial summary statement (866 tag) present.

The Libero item records are not linked to any existing MARC holding record, so the migration programs will generate a MARC holding record based on information in the item. No attempt will be made to link items to existing holding records, because items have location information and the BSZ holding records do not.

Additionally, the migration programs make holdings records based on information in the serials files. The holdings created from serials generally contain note information.

See the MARC Holding Records section for more information on how MARC holding records are generated.

Customer Input

Questionnaire Tab

Institution Code, Customer Code, Institution Name, Customer Name, Time Zone

Codes: INST_CODE, CUST_CODE – these are filled in by Ex Libris

INST_NAME, CUST_NAME – these are mandatory and must be filled in.

Default: N/A

Options: This question is mandatory.

INST_NAME and CUST_NAME: Fill these fields in with your institution's name and your customer name (this is only different from the institution name if you are part of a consortium).

List Prefix for bibs from SFX or other management system

Code: SFX_PREFIX

Default: '(SFX)'

Options: String. If not indicating a link resolver management system, leave blank.

Further Information: If your Libero catalog contains records imported from SFX or another electronic resources management system and you are also migrating bibliographic records directly from SFX or the other management system, this may result in duplicate bibliographic records in Alma. You can enter a prefix here so that the migration programs can identify these bibs and not migrate them to Alma to avoid creating duplicate SFX records in Alma. The migration programs do not make any attempt to physically merge the two records into one.

The default response to this question is (SFX), but you can enter any prefix that represents the bibs that you want to exclude from loading into Alma. The migration programs search for the string in the 035 \$a field of the MARC record. If you do not want to exclude any such records, leave this field blank.

If the migration programs identify bibliographic records containing the prefix in the 035 \$a and the records in Libero are connected to a purchase order line and/or physical items, these bibliographic records are still migrated so that the purchase order and/or items can be migrated, but they are automatically suppressed in Alma to avoid end-user discovery duplication.

MARC Organizational Code

Code: MARC_OC

Default: None; this is not mandatory

Options: Enter your MARC Organizational code, which will be used to construct the former system number in Alma. Only one code is allowed. In Germany, these are the same as ISIL and are managed by the Staatsbibliothek zu Berlin.

Further Information: The migration moves the value in the exported record's 001 field (BSZ bibliographic system number) to the 035 \$a field:

```
(MOC)<BSZ record id>-<customer code>
```

<(MOC)> is the MARC Organization code specified here. <customer code> is the customer code specified in the CUSTOMER_CODE question above.

For example: (AbC) 123456-49abc

Do you use internal system numbers in \$w of Linked Entry fields?

Code: LINKED_ENTRY_W

Default: No

Options: If Yes, the internal system numbers are converted from the BSZ system number to the Alma system number.

Internal record designation for Linked Entry fields \$w

Code: LINKED_ENTRY_PREFIX

Default: blank

Options: If there are internal system numbers in \$w, indicate if they have a prefix that is used to identify these numbers (for example, (abc)12345). If the system numbers in \$w do not have a prefix (for example, 12345), leave this question blank.

If No for the LINKED_ENTRY_W question, then leave blank.

Further information on LINKED_ENTRY_W and LINKED_ENTRY_PREFIX: When bibliographic records are related to each other, such as a journal title that is superseded by a second journal title, BSZ may store the information in bibliographic fields 76x-78x. If the number in the \$w of the linking tags is the internal BSZ system number, these numbers must be changed to the Alma representation of the system number. If your library does not use the internal system number to link and rather relies on more general identifiers such as the ISBN, ISSN, or shared cataloging DB (OCLC or DLC), these numbers are not modified.

In Alma, the system numbers in the \$w field (along with \$z and \$x) are used to link two related bibliographic records together using the related records process. Related records can be found by clicking the More Info link on the Alma Search Results page.

Indicate which 852 subfields to use to determine unique holding records

Code: 852_SUBFIELDS_FOR_HOL

Default: bc (library and location only, not call number)

Options: To group all items on a single bibliographic record by library/location only, indicate bc here. If you have many items on the same bibliographic record in the same library/location but different call numbers WITHIN that library/location, and you want each of them to have their own distinct holding record, specify additional call number subfields. Acceptable subfields: bchijklmp.

The library and location codes are matched after the Alma Location Mapping has been performed, meaning the match is done on the Alma version of the library/location codes.

See sections: Determining Groups for Holding Record Creation/Matching, Changing the Holding Record Grouping/Matching

Limit exported records by location

Code: LIMIT_BY_LOCATIONS

Default: No

Options: If your export contains all of the data from a shared database, and you wish to only migrate a part of that export to Alma, then the migration programs can filter the data according to locations listed on the Location Tab. In this case, the ALMAME_VALUE_NOT_FOUND line on the location tab is not used. Use this option only if agreed upon with your Ex Libris project manager.

Bib Key Prefix

Code: BIB_KEY_PREFIX

Default: empty

Options: If you are combining data from two or more separate databases into a single combined institution in Alma, then indicate a prefix here that will be used to distinguish the former system numbers in Alma after migration. For example, the different systems likely had completely different bibs for system number 12345 and you want to be able to search for the specific bib from your own institution after go-live. The prefix does not include a hyphen so if you want a hyphen in the number (e.g. PQ-12345), then include it in the string. If you are not merging institutions, leave this question blank.

See also the MERGE_PATRON_PREFIX and FUND_PREFIX.

Move 001/003 to 035 or 035

Code: 001_035_935

Default: 035

Options: If your incoming bibliographic records have a number in the 001, then the migration programs move it elsewhere as (<003><001>. For example: (OCoLC)12345. To move to the 035, which is the default, then select 035 in the dropdown. If you are part of a consortium and are using OCLC numbers to determine matching records when linking to the NZ, you may wish to move this number to the 935 so that the moved number does not interfere with another matching key you may be using. If you are not linking to the NZ, then this question is likely not useful. Default: 035

Use subfield indicators in item call number (AltCallNo)

Code: ITEM_CALLNO_SUBFIELD

Default: Yes

Options: When generating an Item Call Number field (also known as AltCallNo), you can decide if the string contains subfield indicators. Default = Yes

Yes = \$h PZ3.A93 Pr16 \$i A975

No = PZ3.A93 Pr16 A975

For more information on when an Item Call Number is generated, see the section **Changing the Holding Record Grouping**, which depends on the question 852_SUBFIELDS_FOR_HOL.

Add \$9 LOCAL to specified tags

Code: NZ_LOCAL_TAGS

Default: empty

Options: Add \$9 LOCAL to specified bib tags, for use in consortia where an IZ environment links to an NZ. Tags marked as Local will be kept in the IZ, and not moved to the NZ.

Format for this input: tag + indicator. Use # for any/wildcard, and b for the space character. Separate with semicolon.

Example: 59###; 69###;960##;970##;090b#

Alma Library Tab

Use this tab to create a list of Libraries in Alma. At least one library is mandatory.

Alma Library Code: Maximum 10 characters. Mixed case is valid, but not recommended. Do not use special characters or spaces. Allowed: - and _ (hyphen and underscore). Not allowed: !@#\$%^&*()+=/?><.,\|]}[{'~ or the space character.

Note

The Alma Library Code may not be the same as the Alma Customer Code nor the Alma Institution Code .

Alma Library name: Maximum 255 characters. Visible to the public.

Address lines: Alma allows you to specify address, phone, and e-mail information about each library. It is mandatory for a library to have a shipping/billing address in order to place orders in Alma. The migration process sets the designated address provided with all possible types in Alma (shipping, billing, claiming, etc.). At least one address line is mandatory.

Email: An email address is mandatory. The migration process sets the email address provided with all possible email address types in Alma.

Phone: The phone number must contain dashes (nnn-xxx-xxxx). A phone number with no dashes is not accepted by the migration program. Not mandatory.

Default language: Indicate the language of patrons and/or staff members if it differs for each library. Use two-letter codes as defined in ISO 639-1. Consult the codes at https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes

Further Information: The Libero Alma-Bibliotek, which is the higher level of location, is comparable to the Alma library. Use the Alma Libraries tab in the Libero Migration Form to indicate your list of Alma libraries. The actual mapping from the Libero Alma-Bibliotek to the Alma library is done in conjunction with the Standort (Location) in the Alma Location tab.

: If you use an error library (for example "EMPTY") in the ALMAME_VALUE_NOT_FOUND line of the Location Mapping tab, be sure to list that library here on the Library Tab.

Alma Location Tab

Use this tab to map your Libero libraries and locations to Alma libraries and locations. Mandatory.

Note

Include ALL locations of ALL types, including electronic types that may ultimately be deleted in Alma. They still need to be provided in the location tab mapping.

Libero Library Code: Value from the Alma-Bibliotek field in the item extract from Libero. The ALMAME_VAL_NOT_FOUND line is required to catch any library codes that you may have missed.

Libero Location Code: Value from the Location field in the item extract from Libero. The ALMAME_VAL_NOT_FOUND line is required to catch any location codes that you may have missed.

Libero Location Description: A description of the location, for assistance in filling out this form. This column is not used in the mapping routine.

Alma Library Code: The Library that will contain this location in Alma. This code must be present on the Alma Library Tab, column A. The match is case-sensitive.

Alma Location Code: The new location code for this location in Alma. It can be a maximum of 10 characters. You can use the same location codes in Alma that you used in Libero, but this is not required. You may also use this form to collapse locations if desired, for example refa and refb in Libero both map to ref in Alma. Mixed case is valid, but not recommended. Do not use special characters or spaces. All owed: - and _ (hyphen and underscore). Not allowed:

!@#%&*()+=/?><.,\|}{ '~ or the space character.

Call Number Type: List the call number type for any newly created holdings records, based on the values for the 852 first indicator. (<http://www.loc.gov/marc/holdings/hd852.html>). If we cannot determine the call number type from the item record itself, we use this as a default for all items in the location.

Alma Location Name: A description for this location as seen/used by library staff members. The same location name cannot be used for different locations in the same library, but the same location name can be used for different locations in different libraries. See the examples in the Further Information section below for what is acceptable and not acceptable. Maximum 255 characters.

Alma External Location Name: A description for this location as seen/used by the public. The same name can be used for as many different locations as desired. For example, the location names may be Archives A and Archives B, but the external location names can both be Archives. Maximum 255 characters.

Electronic Location? (Yes or No): Used by the P2E migration process to determine if a holding/item/order should be converted to electronic. See the Physical to Electronic (P2E) Processing section for more information.

Suppress from Externalization? (Yes or No): Indicate if the location should be suppressed from being visible to the public. The items are not marked as suppressed, but no holdings or items with this location code are exported to Primo.

Further Information: Do not leave the Alma location and library code fields blank. If you want to stop using a location code after migration, map the Libero code to an easily identifiable code such as XXX or unused in case any stray items are still in your Libero database.

ALMAME_VALUE_NOT_FOUND

The ALMAME_VALUE_NOT_FOUND line must be included at the top of the list of locations, in case any location codes were overlooked when completing this map. For example, you may think you do not have any items left in a certain collection, so you leave it off the location map. However, there may be one or two items left, or a stray holding record, etc.

By default, the location code for the ALMAME_VALUE_NOT_FOUND line is “UNASSIGNED”, which is the default catch-all in Alma in production mode. Ex Libris recommends that you select your primary/largest library as the library code for the line, for example “MAIN” as in the example line below. In this case, the items inherit the configurations for the MAIN library.

Libero Location code	Libero Locn Desc	Alma Library	Alma Location Code	Alma Location Desc	Alma External Loc Desc	etc
ALMA_ME_VALUE_NOT_FOUND		MAIN	UNASSIGNED	Problem location from Migration	Problem: See Library Staff	

Post-migration, search for items in the “UNASSIGNED” location and correct the records appropriately.

Alma Location Name and Alma External Location Name

The Alma Location Name column contains the names of the location codes that are displayed in the staff interface. The names cannot be repeated in the Location Name column when the location codes both belong to the same library, but you can use the same name for two different locations, if these locations belong to different libraries. The Alma External Location Name column contains the names of the location codes that are displayed to library patrons. These names can be repeated within the column without regard for libraries. For example:

The following is acceptable:

Library	Alma Location Code	Alma Location Name	Alma External Location Name
Library A	stacks	Main Stacks	Main Stacks
Library B	stacks	Main Stacks	Main Stacks
Library A	archa	Archives A	Archives
Library B	archa	Archives B	Archives
Library A	archstk	Archives Stacks	Archives
Library A	archref	Archives Reference	Archives

The following is not acceptable:

Library	Alma Location Code	Alma Location Name	Alma External Location Name
Library A	archstk	Archives	Archives
Library A	archref	Archives	Archives

The Alma library and Alma location are put in the following places in the migrated or newly created MARC holdings record:

- The Alma library is placed in the 852**⌘**b field.
- The Alma location is placed in the 852**⌘**c field.

Collapsing Locations

This mapping table can be used to collapse location codes – that is, two or more location codes in Libero can map to a single location code in Alma. The Alma location and library code fields may not be empty. If you want to stop using a location code on migration, map the Libero code to an easily identifiable code such as XXX if any stray items are still in your Libero database.

If you collapse location codes, you may have lines in the table such as the following:

Libero Location Code	Alma Library	Alma Location Code	Alma Location Name	Alma External Loc Name	Suppress from Externalization	Electronic Location
reserves	MAIN	RESERVES	Reserves	Reserve	Yes	No
reservesElec	MAIN	RESERVES	Reserves	<i>ReserveElec</i>	Yes	Yes
reservesShort	MAIN	RESERVES	Reserves	Reserve	Yes	No
reservesPerm	MAIN	RESERVES	Reserves	Reserve	Yes	No

The two values in bold italic above (ReserveElec as the External Location name, and Yes for Electronic location) are not used in Alma. Since the locations are being collapsed, the first line for the RESERVES Alma location is used, and all subsequent lines below it use the values from the first line.

Item Base Status Tab

Use this tab to map your item statuses to Alma. This tab is not mandatory if you do not want to migrate your item statuses to Alma.

ITEM STATUS (Exemplar-status): The value in the item status field from the Libero item extract. The status typically indicates what is happening to the item, such as in binding, in repair, lost, etc.

Description: The description of the item status code. The text in this column is written to the internal note 1 in the item in Alma. Maximum 255 characters.

baseStatus: In Alma, the base status indicates whether or not the item is on the shelf. Indicate whether or not an item with this status is on the shelf. For example, lib use only is on the shelf (1), but withdrawn is not (0).

Further Information: Alma has a process type that indicates the status of an item depending on the Alma workflow (item is on loan, item is sent to the bindery, etc.), but the process type is dependent on the corresponding Alma workflow. For migration, all item statuses that are indicated as not on the shelf (0) from Libero are given the process type of TECHNICAL. Further, the item status description field is written to internal note 1 for all items where there was a status, regardless of the shelf/not on shelf designation.

Include any status that may indicate no status, for example Available, but leave column B blank. This migrates the item to Alma with no status at all, which is how Alma indicates that an item has no status. If any status is in your data but is NOT included in column A, it is given a note of Unknown status.

Post migration, you can search for and re-route items with values in the internal note 1 to the appropriate handling or department in Alma. This process can also be used as a configurable criterion for suppressing items from display in the Get It services screens from discovery systems. See [Appendix - Post-Migration Process Statuses](#) for more information.

Item Type Tab

Use this tab to migrate the Libero Item Policy (Exemplar-richtlinie) and optionally the Libero Material type (Medientyp) to the Alma Item Type. This tab is optional. The item type in Alma is not required, so if you leave this tab blank, no item policies in Alma are created.

Libero Item Policy: The value in the item policy field of the item. The item policy is used to differentiate between items when determining how something circulates.

Item Policy Description: The description of the Libero item policy, for information only. This column is not used during the mapping process.

Libero Material Type: (Optional) If the item policy from Libero is not enough to determine the item Policy in Alma, then the material type may be used as a distinguishing factor. This field is not mandatory and you may only choose to fill it in where distinction is needed.

Material Type Description: The description of the Libero material type, for information only. This column is not used during the mapping process.

Alma itemPolicy: The Alma value for the item type. This sheet can be used to collapse item types if desired. Alma Description: This description is loaded into Alma as the display text for the item types. These values can be changed after migration. Maximum 255 characters.

Further Information: If you will leave column C blank to indicate that we should disregard the value in Mediantyp, then the blank should be at the bottom of the group of column A values.

Incorrect:

Item Status	desc	Medientyp	desc	itemPolicy
A		ABC		A1
A		DEF		A2
A				A1
A		GHI		A2

In the above list, items with values A,GHI will be caught in line 3, because the table is read from the top-down.

The table should be correctly filled out as follows:

Item Status	desc	Medientyp	desc	itemPolicy
A		ABC		A1
A		DEF		A2
A		GHI		A2
A				A1

You can optionally include an ALMAME_VAL_NOT_FOUND line at the top of the map. If this line is included, any value not found or any blank value is assigned the value in the ALMAME_VAL_NOT_FOUND line. If the ALMAME_VAL_NOT_FOUND line is not included, any value not found, including blanks, is left as blank in Alma.

Material Type Tab

Use this tab to migrate the Libero Material type (Medientyp) to the Alma Material type.

Libero Material Type (Medientyp): The value in the material type field of the item coming from Libero.

Material type Description: The description of the Libero material type, for information only. This column is not used during the mapping process.

Alma Material Type: The Alma value for the material type. Material types in Alma are fixed. You cannot add any new types to the list. Select the appropriate material type from the drop-down list.

If this field is not mapped, the migration will generate a material type from the bib fixed fields. See the section below on Material Type for information.

Further Explanation – Inventory

Bibliographic Records

Bibliographic records are migrated as is. Each bibliographic record can be modified in the following way during migration:

- Australian customers have ALL bibliographic records marked for Libraries of Australia Publish, if relevant.

- OCLC records (records with an 035 |a with an OCLC-official prefix) are marked for OCLC publish, if relevant.
- The LDR position 9 (character coding scheme) is set to a indicating Unicode.

MARC Holding Records

Alma requires a MARC holding record for all items. During the migration process, the Alma library and Alma location are put in the following places in the MARC holding record:

- The Alma library is placed in the 852**±**b field.
- The Alma location is placed in the 852**±**c field.

When the MARC holding record is created based on information from the item, then additionally the \$h and \$i subfields are filled with the call number from the Libero item call number field. The item call number is taken from the call number field in the item record, NOT from the secondary call number file.

As stated in the introduction, the MARC holding records from BSZ do not have location or call number information. Therefore, the 852 \$b, \$c, and \$h are all left blank for MARC holdings records received from BSZ.

Determining Groups for Holding Record Creation/Matching

For Libero items, a new holding record is created for each group of item records that share the same location or call number. The permanent location and call number in Alma is stored only in the holding record. All items attached to the holding record inherit the permanent location and call number from the holding record. For example, if a bibliographic record has five items:

- Item 1, 2 in Location A
- Item 3, 4 in Location B
- Item 5 in Location C

The migration program generates three different MARC holdings records, one for each location A, B, or C. The items for each location are then attached to the newly created holdings record. If there are any call numbers that differ from the holding record's call number, the differing call number is stored in the item's Item Call Number field.

Changing the Holding Record Grouping/Matching

As part of the migration process, the customer must decide which criteria to use to group items which will share a newly-created MARC holding record. The 852 subfields as mapped from Libero are: \$b Alma Library/Bibliotek \$c Location/Standort \$h Call Number. By default, the migration programs compare \$b and \$c, but the customer can decide to change this to also include \$h based on items in their collection.

For example, if there are four items and a single holding record on the same bibliographic record with the following call numbers:

```
item 1 $b main $c stacks $h PN 567 .M4
item 2 $b main $c stacks $h PN 567 .M4
item 3 $b main $c stacks $h PN 567 .M4 2010
item 4 $b bio $c flr1 $h PN 567 $i .M457
```

When only \$b and \$c are used to determine a holding record group, the following is the result in Alma:

Holding record A: \$b main \$c stacks \$h PN 567 .M4

item 1

item 2

item 3 (original call number stored in ItemCallNo field in the item)

Holding record B: \$b bio \$c flr1 \$h PN 567 \$i .M457

item 4

When the holding record group is based on more subfields, for example \$b \$c \$h, the following is the result in Alma:

Holding record A: \$b main \$c stacks \$h PN 567 .M4

item 1

item 2

Holding record B: \$b main \$c stacks \$h PN 567 .M4 2010

item 3

Holding record C: \$b bio \$c flr1 \$h PN 567 .M457

item 4

Decide which 852 subfields should be used to determine holding record groups by answering the question in the Questionnaire tab of the [Liberio Migration Form](#), Indicate which 852 subfields to use to determine unique holding records.

Call Numbers from Secondary File

Call numbers for items are taken only from the main item file. The call numbers in the secondary item file (mehrfachsignaturen) go either to the item's AltCallNumber field (when "Ja") or to a note (when "Nein").

Call Number Type

The 852 field has a first indicator that indicates what the call number type is. You need to indicate what class scheme to use when holding records are created using information from the item. Fill in the Call Number Type column on the Alma Location tab of the Liberio Migration form to indicate the class scheme per location.

The available call number types can be found at <http://www.loc.gov/marc/holdings/hd852.html>.

Supported on migration:

- No information provided

0 - Library of Congress classification

1 - Dewey Decimal classification

2 - National Library of Medicine classification

3 - Superintendent of Documents classification

4 - Shelving control number

5 - Title

6 - Shelved separately

8 - Other scheme

Not supported on migration:

7 - Source specified in subfield \$2

Item Barcodes

Alma does not allow item barcodes to be duplicated. The item barcode must be unique in Alma. Barcodes may be left empty.

If the barcode exists, but is not unique:

- First item barcode encountered – migrate as is.
- Second and subsequent item barcodes encountered – migrate as <item barcode>-<item id>.

Material Type

The material type in Alma is a description of the type of material the item is such as book, map, issue, DVD, compact disc, etc. It is controlled by a fixed list of physical resource material types in Alma. Each item in Alma must have a material type specified.

Customers may provide a material type in the item extract from Libero if desired. If not provided in the extract, the migration automatically assigns a material type based on Bibliographic record LDR and 007 fields. There is no customer input required for this part of the migration as the Alma types are fixed. The material type in migration is derived from the resource type which is constructed by Alma based on the bib header information. To see a description of how the resource type is determined, see the [Resource Type Field description](#).

Areas/Fields Not In Scope

Boundwiths: Ex Libris does not expect to receive items from Libero that are linked to multiple bibliographic records. If your library has cases where two or more bibliographic records are linked to the same item, consult your Ex Libris project manager.

Fulfillment

Patron records are required if loans, requests, or fines are being migrated. Patron records can be updated post-migration with the patron update routines.

Customer Input

Questionnaire Tab

Which identifier should be used as the patron's Primary Identifier?

Code: PATRON_PRIMARYID

Default: UNIV ID

Options: Using the Libero Field Mapping Form, map the identifiers exported from Libero into the following list: UNIV ID, BARCODE, ADDL ID 1, ADDL ID 2, ADDL ID 3. Then, select here the identifier which should be used as primary for all patrons.

Further Information: The identifier selected here is used as the match point for externally managed patron records to match up with an external authentication system such as LDAP or Shibboleth. Additionally, this identifier is the primary identifier for internally managed patrons. It is highly recommended to use the Primary Identifier as the identifier for authentication.

Notice that Primary Identifier is not case-sensitive, as opposed to all other identifiers, which are case-sensitive.

See also: Identification Numbers, Internal? question on the User Group tab

Enter a two-letter code for the default conversational language for your users (for example en or de)

Code: PATRON_LANG

Default: en

Options: Use the two-letter codes as defined in ISO 639-1. Consult the codes from https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes. Additionally, the language code zh-tw (Taiwanese Mandarin) is accepted.

Currency for patron fines

Code: CURRENCY

Default: USD

Options: Use the three-letter code for the currency used for patron fines. For a list of valid codes, consult http://en.wikipedia.org/wiki/ISO_4217.

Request default destination library

Code: REQUEST_LIBRARY

Default: None

Options: Provide an Alma Library code, which is present on the Alma Library tab of the migration form, which will be used as a default if no request destination library is found in the migrated requests.

Merge Patron Prefix

Code: MERGE_PATRON_PREFIX

Default: No

Options: If you are combining data from two or more separate databases into a single combined institution in Alma, then indicate a prefix here that will be used to distinguish the incoming patron record original IDs. This prefix is only added to the internal patron identifier, it is not added to barcodes or usernames or UNIV_ID. If you are not merging institutions, leave this question blank.

See also: BIB_KEY_PREFIX and FUND_PREFIX

User Group Tab

The user group is used to distinguish groups of patrons from each other in determining different levels of circulation policies. Typical user groups are faculty, staff, undergrad, etc.

If patrons are being migrated, then this mapping table is mandatory.

Libero User Group (Benutzerkategorie): The Libero User Group code, found in the Benutzerkategorie field of the patron extract.

Libero Description: A description of the Libero user group code, here for information only. This column is not used in the mapping to Alma user group

Alma userGroup Code: The mapped group code in Alma. You may choose to use the same codes that you used in Libero, or you may choose to use different codes. You may also choose to collapse groups if desired, for example, having Freshman and Sophomore both map to Undergrad in Alma. Do not use special characters, for example, slashes (/) or spaces in the code.

Alma userGroup Description: The description of the Alma userGroup. This description is loaded into the Alma code table as the description seen in the user interface. This description can be changed easily after migration.

Internal? Y or N: Alma categorizes users as either external or internal. External patrons are managed and authenticated by an external system, such as through a regular load from the bursar's office/campus student information system. Internal patrons are created and managed internally. Examples of internal patrons are rare cases where community borrowers or alumni use library services. When Y, all of the patrons in the Alma userGroup are categorized as internal. When N, all of the patrons in the Alma userGroup are categorized as external.

External users are fully external (except patron notes), including all user identifiers, authentication, and address information. See also the following question on the Questionnaire tab:

- Which identifier should be used as the patron's Primary Identifier?

User Block Tab

A user block is assigned to patrons that have a temporary suspension of borrowing privileges. Libero stores patron blocks in the user status (Benutzerstatuscode) field in the patron record.

This mapping table is not mandatory.

Note

Do not include an ALMAME_VAL_NOT_FOUND line in this table. It is perfectly acceptable for a patron to not have a block code. If there are statuses in Libero which indicate that a patron is ok to borrow, do not include that status in this table.

Liberio user status: The Liberio user status code, found in the Benutzerstatuscode field in the patron extract.

Liberio status Description: A description of the Liberio status code, for information only. This column is not used in the mapping.

Alma userBlock code: The block code desired in Alma.

Alma userBlock description: The description of the block code in Alma. The value in this column is loaded to the server in the userBlock code table. This description can be easily updated after migration.

Fine Fee Type Tab

Outstanding patron fines from Liberio are migrated to Alma Fines and Fees. Only the currently owed amount is migrated. If any partial payments have been made before conversion, they are not reflected on migration to Alma.

Liberio Fine Fee Type (Gebuhrentyp-code): List all of the values from the Liberio fine fee type field in the Liberio extract.
Liberio Description: A description of the fine fee type, for assistance in filling out this form. This column is not used in the mapping routine. Alma Fine Types: Possible values in Alma are listed in the drop-down list.

Further Explanation – Fulfillment

Patrons

Explanations about patron migration processes that do not require your input.

Identification Numbers

The migration program allows for six different types of user identifiers: University ID, Barcode, and Additional ID 1, 2, 3, and 4. Select one of these identifier types as the primary ID – the primary unique identifier that the patron uses to authenticate via Primo. Internal patrons authenticate with the primary ID and a password via the Alma authentication service, and external patrons use the primary ID as the match point with an external authentication system. You select the same identifier type for both internal and external patrons.

The following appears in the [Liberio Field Mapping Data Delivery Form](#):

Note

User Identifiers: values in column A are the expected Liberio field names; values in column B are your local field names. Values in column C are values to use when choosing a primary ID in the Liberio Migration Form.

A	B	C
		UNIV_ID
BARCODE	BARCODE	BAR
		ADDL_ID_1

A	B	C
		ADDL_ID_2
		ADDL_ID_3
		ADDL_ID_4

Typical Libero customers have only the User ID (Benutzernummer) as the user identifier, but if your library has additional identifiers, fill them in columns B and C. Then, on the Libero Migration Form, Questionnaire tab, select the identifier from column C to use for the primary identification number for your internal and external patrons to use when authenticating from an external system (for example Primo).

Whichever identifier is chosen for the primary ID, the first identifier found in the field is used as the primary ID, and all subsequent identifiers are kept in the userIdentifier section. The primary ID must be unique, so if there are duplicates, the first unique ID found is migrated as is, and the IDs for the second and subsequent patrons with the same ID are given a suffix of -1, -2, etc. The original identifier is stored in the non-unique userIdentifier field so that the patron can still be retrieved using that identifier.

When an identifier is written to the identifier section and there are multiple instances, the first one found for each type is active and the subsequent ones are inactive. Identifiers that are not used as the primary ID do not need to be unique and are not deduplicated.

If the identifier selected for the primary ID is not present, the migration program creates an identifier for the patron based on the patron original ID, prefixed with ID. The migration programs do not fill in the primary ID with a non-selected identifier.

Loans

Active loan transactions are migrated from Libero to Alma. Completed (checked-in) loan transactions are not included in the migration to Alma.

Requests

Active requests are migrated from Libero to Alma. Active requests are those which are sitting on the shelf waiting for a patron to pick up the item.

Acquisitions

Customer Input

Questionnaire Tab

ACQ mode

Code: ACQ_MODE

Options: Select Yes or No depending on whether or not you have contracted with Ex Libris to migrate any Acquisitions data.

Enter a default language of conversation with vendors

Code: VENDOR_LANG

Default: en

Options: Use the two-letter codes as defined in ISO 639-1. Consult the codes from https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes.

Central Order Library

Code: CENTRAL_ORDER_LIB

Default: None

Default Order Library

Code: DEFAULT_ORDER_LIB

Default: First library found on the Alma Library list

Options for Central and Default Order Library: The Library field specifies the order location for orders in Libero. The migration attempts to map the Library field to the corresponding Alma Library. If you want to override the Library field and instead assign an order library to all orders migrated, then fill in a value for the Central Order Library question. Otherwise, if you want to use the Library field to determine the order library, leave the Central Order Library blank and fill in a value in the Default Order Library question. In this case, the migration attempts to determine a library based on the Library field and only when a library is not specified or a mapping is not found does it use the Default Order Library as a second choice.

Note

If you use DEFAULT_ORDER_LIB and therefore attempt to map the Library field to an Alma location, you must include your Library values in the Alma Location Tab map in the migration Form. Library values are often not the same values as inventory Location fields.

What is your currency?

Code: ACQ_CURRENCY

Default: USD

Options: List the currency used for all of your funds. Orders can have other currencies and be translated to the default currency, but funds must have a single base currency.

The currency should be a three-letter code, as listed in http://en.wikipedia.org/wiki/ISO_4217

Fiscal Period Cycle Pattern

Code: FISCAL_PERIOD

Default: 01-07-1 (fiscal period starts on July 1 (01-07) and lasts for one year (-1)).

Options: To have functioning ledgers, fiscal periods are required. Specify your fiscal period as DD-MM-C (Day-Month-

Cycle). For example, a one year fiscal period starting on January 1 is indicated by: 01-01-1. A one year fiscal period starting on July 1 is indicated by: 01-07-1.

Alma currently supports one-year fiscal period cycles.

Which year do you use to name the fiscal year?

Code: FISCAL_PERIOD_NAME

Default: second

Options: Specify if the fiscal period is named with the first year or the second year.

- Second – if the fiscal period runs July 1 2014 through June 30 2015, then the fiscal year is named 2015.
- First – if the fiscal period runs July 1 2014 through June 30 2015, then the fiscal year is named 2014.

If your fiscal period runs from January 1 through December 31, this question is not necessary.

Current Fiscal Year

Code: CURRENT_FISCAL_PERIOD

Default: determine by date of conversion

Options: This question is important around the fiscal period close, depending on whether or not you have run fiscal period close in your legacy ILS or if you will run it in Alma after migration. If you do not know how to answer this, select determine by date of conversion. The options are:

- Determine by date of conversion – The conversion program uses the fiscal period that includes the date of conversion.
- 2013-2014 – Select this option if the date of conversion is later than the fiscal period to which you want your orders to migrate. For example, if the migration date is July 3, 2014, and the previous fiscal period ended on June 30, 2014, select this to put all of your orders in the fiscal period that ended on June 30, 2014. Select this option if you want to run fiscal period close in Alma instead of in your old system.
- 2014-2015 – If the date of conversion is earlier than the start date of the desired fiscal period, select this option. For example, if the migration date is June 15, 2014, and the next fiscal period begins on July 1, 2014, select this option to put all of your orders in the next fiscal period. Select this option if you want to perform the fiscal period rollover in your legacy ILS prior to conversion.

Accrual Accounting

Code: ACCRUAL_ACC_FY

Default: No, do not make an additional fiscal year

Options: If your library uses accrual accounting, you can instruct Ex Libris to make an additional fiscal year. When an additional fiscal year is created, it will be after the current fiscal year. For example, if the current active fiscal year is 2016, then the additional year, also active, will be 2017. The options are:

- No – do not make an additional fiscal year.
- Yes – No Funds – make an additional fiscal year but leave it empty. The library will then need to create funds for this fiscal year after go-live.

- Yes – duplicate funds – make an additional fiscal year and also fill it with funds that are the same codes as the funds in the current fiscal year. No allocations are made.

Default claiming period

Code: ORDER_CLAIM

Default: 90

Options: Default claim used for vendors and orders (if applicable), in days.

Fund Prefix

Code: FUND_PREFIX

Default: none/blank

Options: If you are combining data from two or more separate databases into a single combined institution in Alma, then indicate a prefix here that will be used to distinguish the former fund codes in Alma after migration. Provide a string to be used to prefix all fund codes in the database. A hyphen is NOT provided. For example, if your fund code is SCIENCE-MONO, and you put UWS- here, the final fund code is UWS-SCIENCE-MONO. Leave this question blank to leave the fund code as is.

See also the similar BIB_KEY_PREFIX and MERGE_PATRON_PREFIX

PO Line Type Tab

This tab is mandatory if you are migrating orders. Include a line for ALMAME_VAL_NOT_FOUND since this field is mandatory in Alma.

Libero Order type (Bestelltyp): Value of the order type field in Libero, found in the Bestelltyp field in your order extract.

order Type Description: A description of the order type field, for information only. This field is not used in the mapping to Alma.

poLineType: The Alma line type value. Select one of the following line types from the drop-down list:

- PRINT_OT – printed book one time. This is used for one time or infrequent orders of specific items, for example, a printed book, E book, or a musical score, that is not published repetitively. The order is at the item level. If the only physical items that you order are books, this type is essentially the same as Print Book - One Time.
- PRINTED_BOOK_OT: Print Book One Time
- PRINT_CO – journal/continuation. This is used for orders that are repeated on a regular basis. An example is monthly subscriptions to physical or electronic material such as journals. The order is at the holding level, and items in the holding record are received periodically.
- PRINTED_JOURNAL_CO: Print Journal - Subscription
- PRINT_SO – standing order monograph. This is used for orders that are not repeated on a frequent or regular basis. For example, this type of PO line is used for purchasing all the printed books by a particular author when they are published or where a series of books are being published, but not necessarily on a regular basis. The receipt of new material involves a new bibliographic, holdings, and item record. If the only physical items that you order are books, this type is essentially the same as Print Book - Standing Order.
- PRINTED_BOOK_SO: Print Book – Standing Order

- PRINT_SO_NONMON - Standing Order Non-Monograph – Similar to continuous orders.
- OTHER_SERVICES_OT - Other Services One Time – Various non-inventory orders for services purchased from a vendor. Both one-time behavior and repetitive behavior are available. This should only be applied to orders without inventory. For electronic resources, see Line Types and Electronic Orders.
- OTHER_SERVICES_CO: Other Services Subscription. This should only be applied to orders without inventory. For electronic resources, see Line Types and Electronic Orders.

Further Information: Use this tab to define the line type of the migrated order. The PO may move through Alma workflows differently according to what type of item is on order. For example, a monographic order is opened, sent to the vendor, received, invoiced, and closed. However, a serial order may be received and invoiced many times and may remain open indefinitely.

Alma does have other PO Line types, but they are not available for use in migration.

Line Types and Electronic Orders

The above line types are all descriptions based on a print order. All orders are stored in Libero migrate as print and so are migrated to Alma initially as print using the above line types. The physical to electronic (P2E) process identifies orders attached to electronic bibliographic records and transforms the order to electronic. In other words, if an order migrates as PRINT_SO, is attached to a bibliographic record you identify as electronic and is in an electronic location, it is changed to the corresponding electronic standing order line type by the P2E process. See the section on Physical to Electronic Processing below for more information on the overall P2E process.

PO Acq Method Tab

Use this tab to determine the Acquisition Method of an order in Alma. The acquisition method is an indication of how the order is acquired.

Libero Acquisition type (Erwerbungsstyp): The value of the Acquisition type field in Libero, found in your order extract. Order type description: A description of the Order Type in Libero, for information purposes only. This field is not used in the mapping to Alma.

poLineAcqMethod: The Acquisition method in Alma. AcqMethod is mandatory in Alma. If not found, then use PURCHASE. Select one of the following values from the drop-down list:

- PURCHASE – normal workflow
- GIFT – not sent to vendor and no invoicing or payment
- EXCHANGE – not sent to vendor and no invoicing or payment
- APPROVAL – pre-established delivery plan - normal workflow except not sent to vendor
- VENDOR_SYSTEM – the order is placed at the vendor site so that sending it to the vendor is not required. The normal workflow is followed except that the order is not sent to the vendor.
- DEPOSITORY – usually from the government. The order is not sent to vendor and there is no invoicing or payment.
- TECHNICAL – no fund or amount required
- LEGAL_DEPOSIT – does not require fund or price, and uses a special version of the PO Line order letter

Comment: Add any comments about ORDR_TYPE for use while filling out this form. This field is not used by the migration programs.

Further Information: The PO Acq Method is mandatory in Alma, so the ALMAME_VALUE_NOT_FOUND line is required to

catch any values that may not have been found in the map.

PO Entry Point

The entry point value is used to determine where PO falls in the workflow in Alma. The following are the possible values for poEntryPoint:

- **NEW** – The order has been created but not sent to the vendor yet. Orders can have status NEW for years while librarians are reviewing what to order, or they can have status NEW for a short while if the acquisitions staff created the order to send to the vendor immediately.
- **SENT** – The order has been sent to the vendor and funds have been encumbered/committed. The item has not been received yet for one-item orders, or the item has been received for continuous orders. Continuous orders that continue to be invoiced/received remain with SENT status (which can be considered as a sub-status of waiting for renewal within Alma) until they are closed.
- **WAITING_FOR_INVOICE** – Use only for one-time orders. The item has been received, but not the invoice. Invoice status must not be FULLY_INVOICED.
- **CLOSED** – The order has been received and invoiced. Nothing else will be received on this order. (Do not use for open continuous orders that you are still receiving.)
- **CANCELLED** – Cancelled order.

For the migration from Libero, first the migration program checks if Bezahldatum = Payment date has value and it is a One-Time (OT) order. If so, the PO is set to CLOSED. Then, the program checks the PO Entry Point map.

Libero Order Status (Bestellstatus): The value of the Order Status field in Libero.

poLineType: The mapped PO Line Type (mapped in the PO Line Type tab)

Alma PO Entry Point: select an entry point for this order in Alma. Possible values are described above and can be selected from the dropdown.

Further Explanation – Acquisitions

Purchase Orders

POL Copies/Inventory Handling

Alma has a very tight inventory to POL connection. Not all ILS source systems have the same requirement that inventory be linked to orders. Due to this, the migration process cannot always link inventory to orders. The following describes various cases:

- **One Time Orders**
 - One time orders generally do not link to any specific item in source ILS systems. Only with a specific item id in hand can the location/copy information on such POLs be created.
 - Since there is generally no such connection, we pass only the intended library/location and quantity in the POL receiving note, which most source systems do provide. This information allows the receiving/purchase operator upon receipt to:
 - Open the POL and add the relevant copy which is being received - presuming the item wasn't created

prior to the receipt.

- At this point, the item can be received normally.

Note

Less common case instead of 2a. in case the item was pre-created before receipt, open the item editor and link to the relevant POL, then proceed to step 2b.

- Ongoing Continuous/Subscriptions/Non-monographic Standing Orders. These order types often link to a specific holding record in source ILS systems. If they do, receiving occurs in Alma as usual. This is why a location/copy for continuous orders (which means an actual holdings record ID association was made to the order) are related to such orders.
- Alma supports only one order line per holding, while source systems may allow more than one order per holding. Therefore, in migration processing, the most recent open order is chosen for holdings that has more than one order line reference.
- Older orders will not have copy information and will also not undergo P2E.
- Some orders do not have any holding relationship in the source system.

If there is no holding reference for any of the reasons described above, the operator still has full capabilities to receive, if one of the following steps are implemented:

- If the holding to receive upon exists – From the holding editor, link the holding to a specific order (taking into account that it is limited to one order from that holding).
- If the holding to receive upon does not yet exist – From the PO line edit page, select Add holding/copies to create and link a new holding to the order. This allows the receiving of new items.

Funds

Encumbrances

Transactions from active purchase orders are created as encumbrances in Alma when the orders fund reference is valid and exists. An active purchase order is defined as one in which the mapped PO entry point is NEW, SENT, or WAITING_FOR_INVOICE and is in the current fiscal year.

Transactions of Amount 0.00

Libero allows for transactions to be of value 0.00 for all purchase orders (encumbrances). In Alma, fund transactions can be of amount 0.00 only when it is an encumbrance and when the associated PO is of type GIFT, DEPOSITORY, EXCHANGE, or TECHNICAL.

All other encumbrances of amount 0.00 are changed to 1.00.

Physical to Electronic (P2E) Processing

In Libero, all resources are categorized as physical in the database, even if the record represents an electronic item. All records are converted to Alma as physical initially. A second process converts records identified as electronic to the electronic format. Provide a list of records that are identified as being electronic, as part of the data delivery, in the

following format:

1123475,portfolio

12345,package

12346,DB

Note

The words `portfolio`, `package`, and `db` are not case-sensitive; therefore, both `portfolio` and `Portfolio` are acceptable.

If you provide a bibliographic record in the P2E file, the migration programs will generate an electronic resource for the bib, even if there is no valid URL. An example of an invalid URL might be an 856 tag with an indicator which does not match the specific indicator in the question P2E_LINK, below. For example, if you say that we use 85641u for the P2E_LINK, and you provide a bib record *without* a 85641u but that bib record is in the p2e file, then we will generate a local e-resource without any link at all (an empty resource). Be careful which bibs are placed in the bib file.

Further, the P2E process attempts to identify an order related to the identified inventory for conversion to electronic. Similarly to items and holdings, orders are initially migrated as print and are transformed to electronic through the p2e process. See the guide https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides/Electronic_System_Migrations/Electronic_Resource_Handling_in_Alma_Migration for more information.

Customer Input

Questionnaire Tab

For each of the following three questions (P2E_LINK, P2E_NOTE, and P2E_PROVIDER), you can use indicators in the following manner:

- Specific indicators: 85641u – only tags with 41 as the indicator is used.
- No indicator (# is used for a blank character, for example: 8564#u) – only tags with 4<blank> as an indicator are used.
- All possible indicators: 8564*u – tags with 4 as the first indicator are used. The second indicator is not taken into account.

The space character operates the same way as an asterisk (*), for example: 8564 u is the same as 8564*u.

- Special Request: If you need to specify multiple specific indicators, for example 85641 and 85642, it cannot be coded in the migration form but your ExL representative can make a special request to the migration team.

Which Holding or Bib field stores electronic link information

Code: P2E_LINK

Options: Provide a 3 digit Marc field code + subfield: 856u. Only one subfield is allowed.

Recommendation: 856 u

Default: If this is left empty, no tag is used.

Which Holding or Bib field stores electronic link public note

Code: P2E_NOTE

Options: Provide a 3 digit Marc field code + subfield: 856z. Only one subfield is allowed.

Recommendation: 856 z

Default: If this is left empty, no tag is used.

Which Holding or Bib field stores electronic provider name information

Code: P2E_PROVIDER

Options: Provide a 3 digit Marc field code + subfield: 856m. Only one subfield is allowed.

Recommendation: 856 m

Default: If this is left empty, no tag is used.

Alma Location Tab

Electronic Location Column

Identify which locations indicate an electronic holding or item record. A single bibliographic record may contain holdings for multiple locations, but only the holdings/items for electronic locations need to be identified. Identify the locations in the in the Electronic Location? column in the Alma Location tab of the Libero Migration Form.

PO Line Type Tab

Line Types and Electronic Orders

The PO line types are all descriptions based on a print order. All orders are stored in Libero as print, and so are migrated to Alma initially as print using the above line types. The physical to electronic (P2E) process identifies orders attached to electronic bibliographic records and transforms the order to electronic. In other words, if an order migrates as PRINT_SO, is attached to a bibliographic record that you identify as electronic and is in an electronic location, it is changed to the corresponding electronic standing order line type by the P2E process.

Further Information

If you have multiple 856 links in a single bibliographic record identified as electronic, a different inventory link for that bibliographic record is created for each URL found in the record. In addition, if you have two item records with different electronic locations attached to the same bibliographic record, a different inventory link is created for each location, as well.

For more information on the electronic migration approach to Alma, refer to [Electronic Resource Handling in Alma Migration](#).

Appendix

Post-Migration Process Statuses

The process statuses (codes) from Libero are mapped to the indexed internal note 3 field of the Alma item. These items are considered not available after migration when process = Technical – Migration.

These fields are currently indexed in the item keyword and advanced searches.

When searching for physical items, a staff user can search by item process status code with the general keyword search and then by facet if before searching, Process type = Technical – Migration and with the advanced search filter when Process type = Technical – Migration.

In order to give items real Alma statuses or remove the Technical – Migration status, scan the barcode of the item to various configured departments (via receiving, for example), request a move to various departments/temp locations, or just scan the item for return, which removes the status from the item. You may also use the Scan In API, described here: <https://developers.exlibrisgroup.com...le-of-barcodes>.

Additionally, it is also possible to configure the GetIt (Primo) services to display or not display items with this process status in the GetIt Item list.