

From Aleph to Alma : fulfillment : feel it fully

Muriel Van Ruymbeke – Rémy Lhoest – Paul Thirion

ULg Library

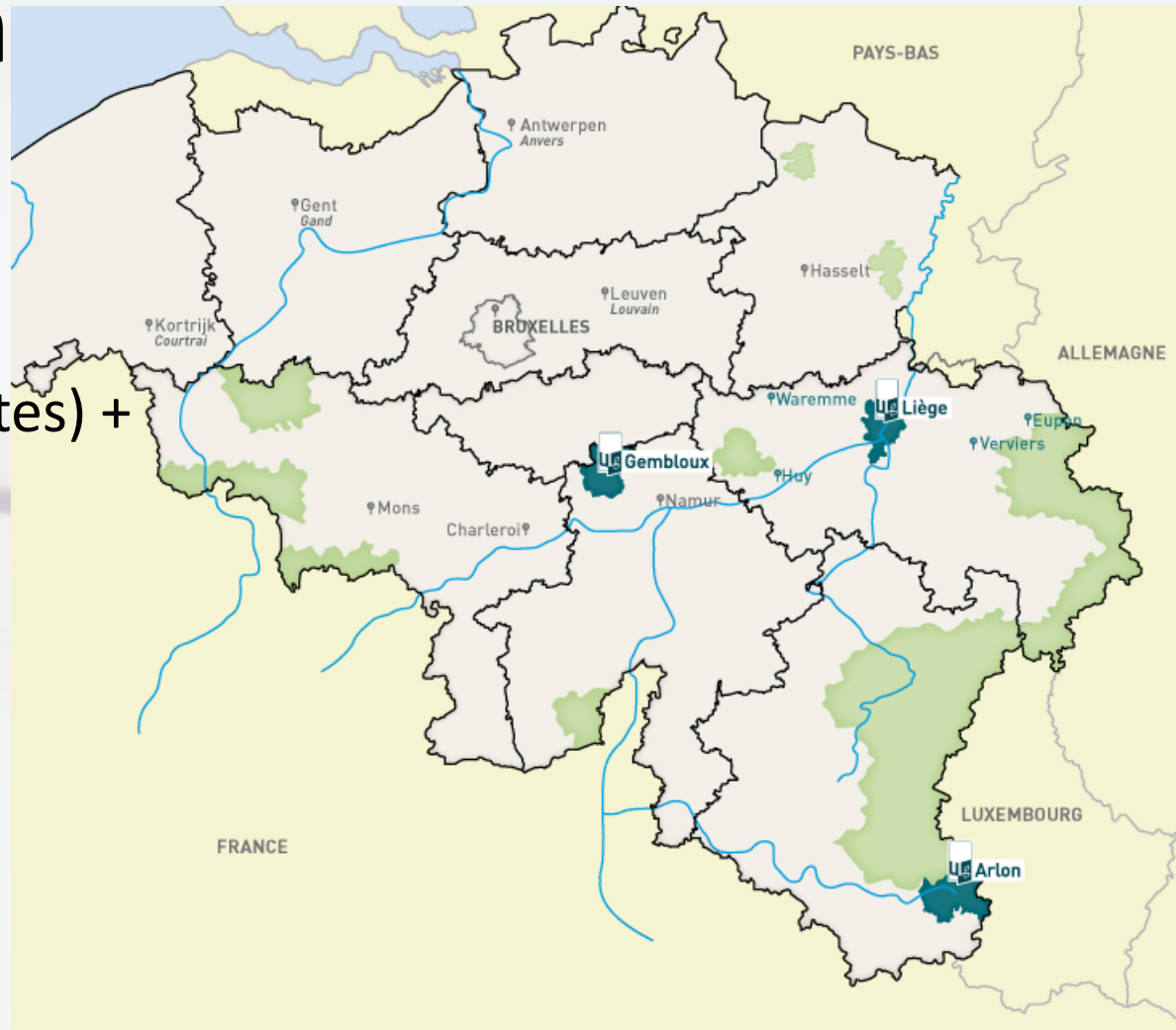


Outlines

- Introduction
- Milestones for circulation policies in Aleph
- Milestones for circulation policies in Alma
- Main differences
- Impacts on implementation activities
- Life after Go-Live and Conclusions

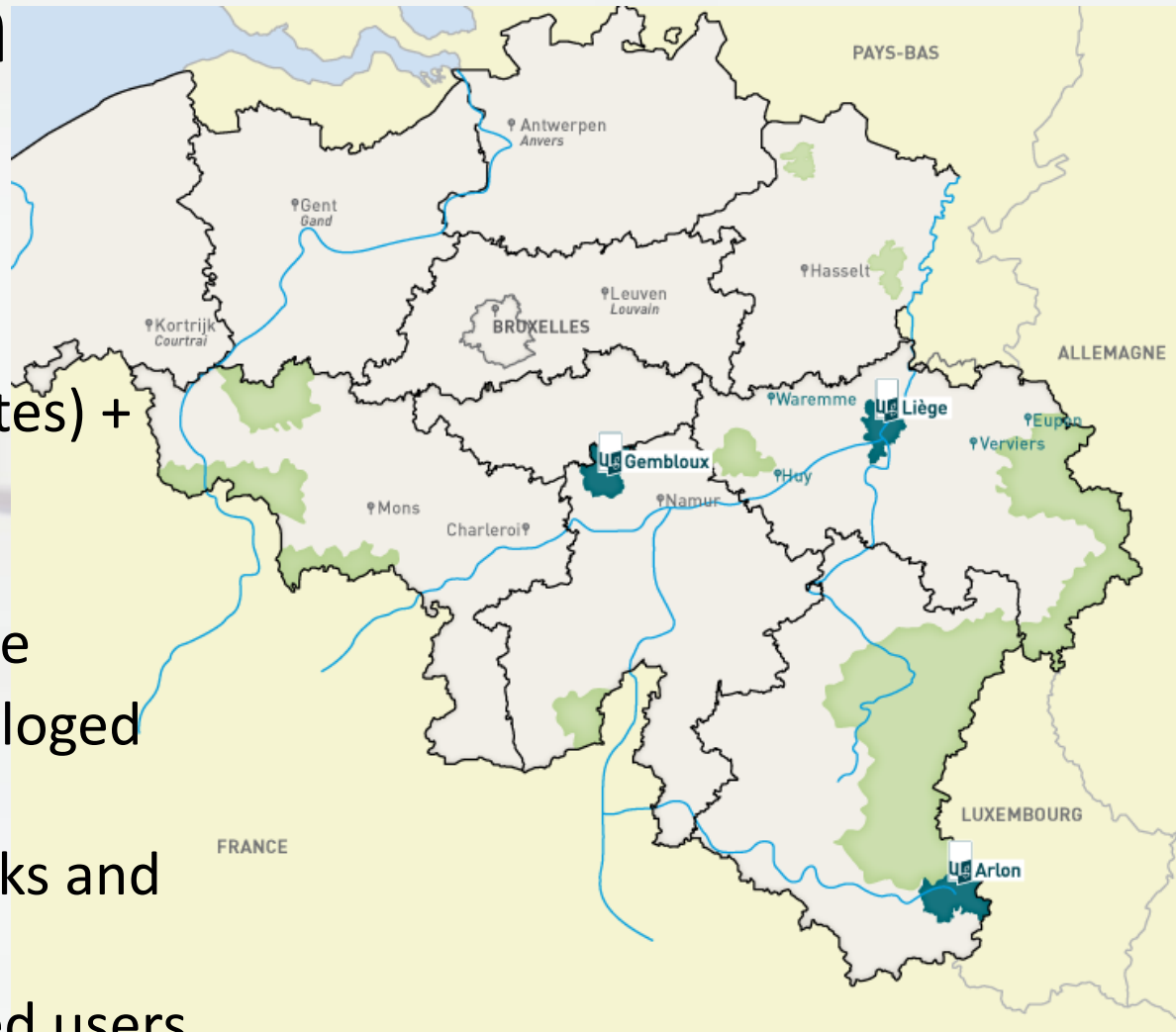
Introduction

- ULG Library
 - 1 institution
 - 5 Libraries (17 sites) + 16 departments
 - 7 campuses



Introduction

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 - 1 institution
 - 5 Libraries (17 sites) + 16 departments
 - 7 campuses
 - 1 Remote Storage
 - 1 200 000⁺⁺ cataloged works
 - 100 000⁺⁺ E-books and E-journals
 - 66 000⁺⁺ recorded users



Introduction

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 - 5 Libraries (17 sites) + 16 departments
 - 7 campuses
 - 1 Remote Storage
 - 1 200 000⁺⁺ cataloged works
 - 100 000⁺⁺ E-books and E-journals
 - 66 000⁺⁺ recorded users
- Aleph (June 2006 – February 2015)
- Primo local (2013 – February 2015)
- Alma (February 2015 → ...)
 - 1st French speaking University Alma adopter
- Primo hosted (February 2015 → ...)



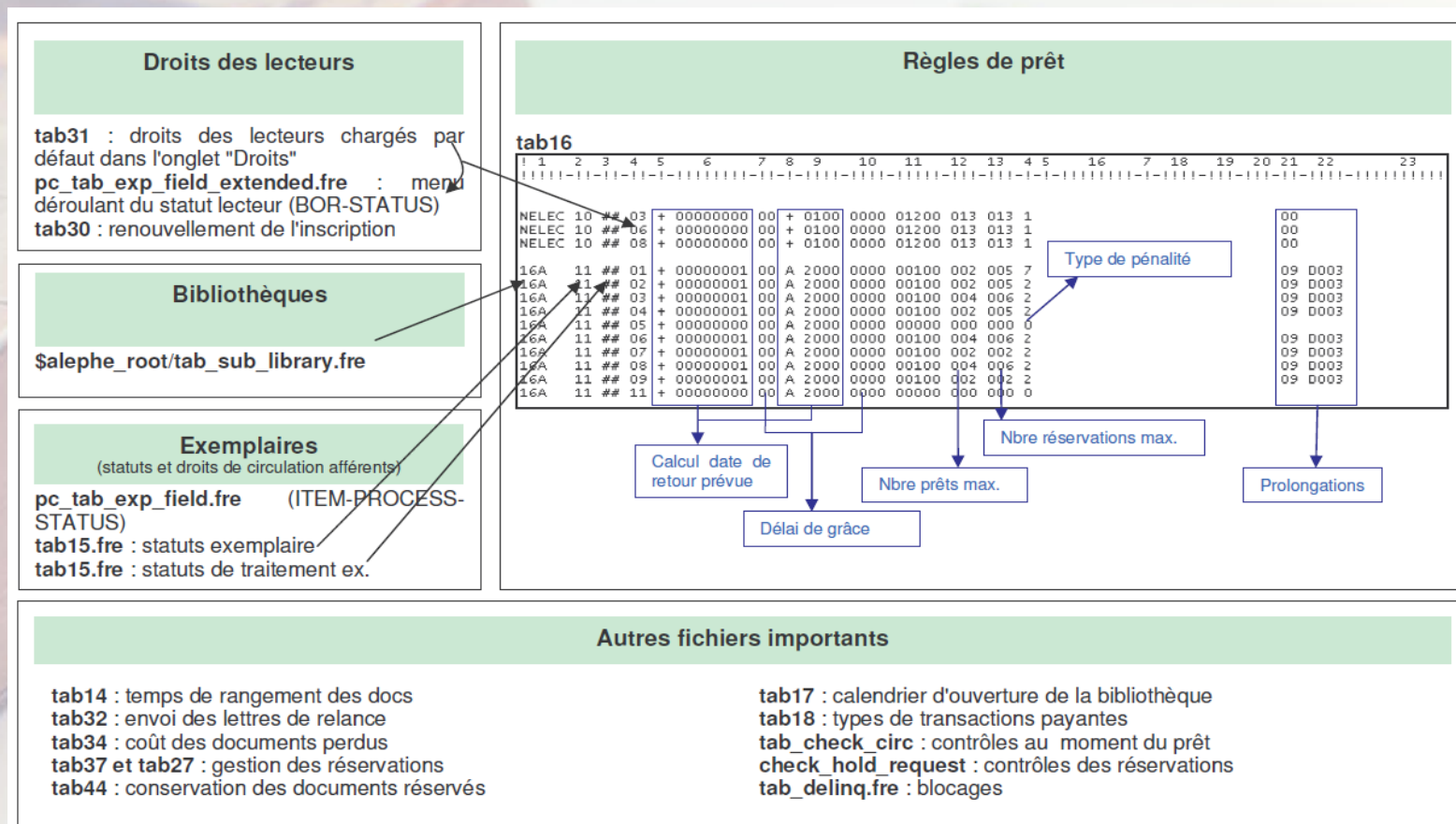
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Milestones for circulation policies in Aleph

- Library
- Patron status
- Item status
 - + Item process status

Milestones for circulation policies in Aleph



Milestones for circulation policies in Aleph

- 17 libraries under 5 Supra –libraries

Milestones for circulation policies in Aleph

- 17 libraries under 5 Supra-libraries
- 11 Patron statuses

BOR-STATUS	##### L <u>Bachelier ULg ou assimilé</u>	01
BOR-STATUS	##### L <u>Maîtrise (1ères années) / AESS ULg ou assimilé</u>	02
BOR-STATUS	##### L <u>Maîtrise (terminale) / DEA ULg ou assimilé</u>	03
BOR-STATUS	##### L <u>Doctorant ULg ou assimilé</u>	04
BOR-STATUS	##### L <u>Définitif/émérite ULg ou assimilé</u>	05
BOR-STATUS	##### L <u>Temporaire ULg ou assimilé</u>	06
BOR-STATUS	##### L <u>Extérieur</u>	07
BOR-STATUS	##### L <u>Extérieur privilégié</u>	08
BOR-STATUS	##### L <u>PIB</u>	09
BOR-STATUS	##### L <u>Visiteur (droits restreints)</u>	10
!BOR-STATUS	##### L -----	--
BOR-STATUS	##### L <u>Lecteur virtuel de transfert</u>	10 80

Milestones for circulation policies in Aleph

- 17 libraries under 5 Supra-libraries
- 11 Patron statuses
- 11 Item statuses

REG	10	##	L	<u>Emprutable</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	11	##	L	<u>Emprutable sur demande</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	12	##	L	<u>Emprutable une semaine</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	13	##	L	<u>Emprutable deux semaines</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	14	##	L	<u>Emprutable une journée</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	16	##	L	<u>Emprutable 15 j. sur demande</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	18	PC	L	<u>Non consultable (ALMA)</u>	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	20	##	L	<u>Consultable uniquement</u>	N	N	N	N	Y	Y	N	Y	N	00	N
REG	21	##	L	<u>Consultable sur autorisation</u>	N	N	N	N	Y	Y	N	Y	N	00	N
REG	22	##	L	<u>Consultable sur demande</u>	N	N	N	N	Y	Y	N	Y	N	00	N
REG	26	##	L	<u>Consultable 15 j. sur demande</u>	N	N	N	N	Y	Y	N	Y	N	00	N
REG	30	##	L	<u>S'adresser au service</u>	N	Y	N	N	Y	Y	N	Y	N	00	N

Milestones for circulation policies in Aleph

- 17 libraries under 5 Supra-libraries
- 11 Patron statuses
- 11 Item statuses
- 18 Item Process statuses

REG	10	##	L	Empruntable	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	11	##	L	Empruntable sur demande	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	12	##	L	Empruntable une semaine	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	13	##	L	Empruntable deux semaines	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	14	##	L	Empruntable une journée	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	16	##	L	Empruntable 15 j. sur demande	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	18	PC	L	Non consultable (ALMA)	Y	Y	N	N	Y	Y	N	Y	N	00	N
REG	20	##	L	Consultable uniquement	N	N	N	N	Y	Y	N	Y	N	00	N
REG	21	##	L	Consultable sur autorisation	N	N	N	N	Y	Y	N	Y	N	00	N
REG	22	##	L	Consultable sur demande	N	N	N	N	Y	Y	N	Y	N	00	N
REG	26	##	L	Consultable 15 j. sur demande	N	N	N	N	Y	Y	N	Y	N	00	N
REG	30	##	L	S'adresser au service	N	Y	N	N	Y	Y	N	Y	N	00	N

ITEM-PROCESS-STATUS	L	En commande	CO
ITEM-PROCESS-STATUS	L	Commande réclamée	CR
ITEM-PROCESS-STATUS	L	Commande annulée	CA
!ITEM-PROCESS-STATUS	L	Consulté en salle de lecture	SL
ITEM-PROCESS-STATUS	L	Sur présentoir d'exposition	PR
!ITEM-PROCESS-STATUS	L	Provisoirement non empruntable	NE
ITEM-PROCESS-STATUS	L	Provisoirement non consultable	NC
ITEM-PROCESS-STATUS	L	Non consultable	PC
ITEM-PROCESS-STATUS	L	Manquant	MA
ITEM-PROCESS-STATUS	L	A la reliure	RE
ITEM-PROCESS-STATUS	L	En attente de reliure	RA
ITEM-PROCESS-STATUS	L	En traitement	TR
ITEM-PROCESS-STATUS	L	Fascicule attendu	FA
ITEM-PROCESS-STATUS	L	Fascicule réclamé	FR
ITEM-PROCESS-STATUS	L	Fascicule non reçu	FN
!ITEM-PROCESS-STATUS	L	En transit de/vers le magasin à livres (test)	DP
!ITEM-PROCESS-STATUS	L	En prêt pour une exposition	EX
ITEM-PROCESS-STATUS	L	Nouveauté [test]	NW

- Table 16
 - 27 columns
 - 843 lines

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 - 843 lines

!BGP	1	ULG51	L	BGPHL				ULG51	ALEPH
BGP02	1	ULG51	L	ALPHA-Bibliothèque principale	ALPHA	BGPHL	BGP02	ULG51	
BGP03	1	ULG51	L	ALPHA-Germanique	ALPHA	BGPHL	BGP03	ULG51	
BGP04	1	ULG51	L	ALPHA-Philo & Communication	ALPHA	BGPHL	BGP04	ULG51	
BGP05	1	ULG51	L	ALPHA-Romane	ALPHA	BGPHL	BGP05	ULG51	
BGP06	1	ULG51	L	ALPHA-Sciences historiques	ALPHA	BGPHL	BGP06	ULG51	
BGP07	1	ULG51	L	ALPHA-Sciences de l'Antiquité	ALPHA	BGPHL	BGP07	ULG51	
BGP08	1	ULG51	L	ALPHA-Architecture (Botanique)	ALPHA	BGPHL	BGP08	ULG51	
BGP09	1	ULG51	L	ALPHA-Architecture (Outrem.)	ALPHA	BGPHL	BGP09	ULG51	
!BGP10	1	ULG51	L	ESA Saint-Luc	ALPHA	BGPHL	BGP10	ULG51	
BGP11	1	ULG51	L	GAR (Outremeuse)	ALPHA	BGPHL	BGP11	ULG51	
!* BGP90	1	ULG51	L	Service/Centre	XXX90	XXX90	XXX90	ULG51	
!* !MAL01	1	ULG51	L	Magasin à livres	MAL01	MAL01	MAL01	ULG51	
!* !GRA				GRAULICH					
GRA01	1	ULG51	L	Bibliothèque Graulich	REG	GRAUL	GRA01	ULG51	
GRA02	1	ULG51	L	Graulich-HEC (site Louvrex)	REG	GRALO	GRA02	ULG51	
GRA03	1	ULG51	L	Bibliothèque Graulich	GRA03	GRA03	GRA03	ULG51	
!* GRA90	1	ULG51	L	Services associés à Graulich	XXX90	XXX90	XXX90	ULG51	
GRA91	1	ULG51	L	Services associés à Graulich	XXX90	XXX90	XXX90	ULG51	
GRA92	1	ULG51	L	Services associés à Graulich	XXX90	XXX90	XXX90	ULG51	
GRA93	1	ULG51	L	Services associés à Graulich	XXX90	XXX90	XXX90	ULG51	
!* !BST	1	ULG51	L	BST				ULG51	ALEPH
BST01	1	ULG51	L	BST-Géosciences	REG	BST	BST01	ULG51	
BST03	1	ULG51	L	BST-Sciences	REG	BST	BST03	ULG51	
!BST07	1	ULG51	L	BST-Réserve compactus B52	REG	BST	BST06	ULG51	
BST08	1	ULG51	L	BST-Sc. appliquées & Math.	REG	BST	BST08	ULG51	
BST10	1	ULG51	L	BST-Marcel Florquin	REG	16A	BST10	ULG51	
BST11	1	ULG51	L	BST-Campus Arlon	REG	BST	BST11	ULG51	
!* BST90	1	ULG51	L	Services associés à la BST	BST90	BST90	BST90	ULG51	
BST91	1	ULG51	L	Services associés à la BST	BST90	BST90	BST90	ULG51	
!* !BST02	1	ULG51	L	OLD - Géographie	REG	BST	BST02	ULG51	
!BST04	1	ULG51	L	OLD - Math	REG	BST	BST04	ULG51	
!BST05	1	ULG51	L	OLD - Sc. T.	REG	BST	BST05	ULG51	
!BST06	1	ULG51	L	OLD - Sc. App	REG	BST	BST06	ULG51	
!* !BSV	1	ULG51	L	BSV				ULG51	ALEPH
BSV02	1	ULG51	L	Bib. des Sciences de la Vie	BSV	BSV	BSV02	ULG51	
BSV04	1	ULG51	L	BSV-Vétérinaire	BSV	BSV	BSV04	ULG51	
BSV05	1	ULG51	L	BSV-Botanique	BSV	BSV	BSV05	ULG51	
!BSV06				BSV-Zoologie					
!BSV03	1	ULG51	L	OLD - Psycho	BSV	BSV	BSV03	ULG51	
!* BSV90	1	ULG51	L	Services associés à la BSV	XXX90	XXX90	XXX90	ULG51	

Milestones for circulation policies in Aleph

Library and collection

Item status and item process status

1. Affichage exemplaire | 2. Infos générales (1) | 3. Infos générales (2) | 4. Infos périodiques | 5. Niveau

Code-barres: 500201122

Bibliothèque: BGP06

Localisation:

Numéro abonnement:

Type matériel: BOOK

Lien HOL: 17895

Type 85X /Lien N°: 0

Type cote/cote: 4 \$\$\$HAA/ACR. 0081

2nd type cote/Cote: 8

Description:

Statut exemplaire: 20

Statut traitement: RE

Niveau num. 1 (A)

Niveau num. 2 (B)

☐ Cote temporaire

Milestones for circulation policies in Aleph

LDR	—	—	^ ^ ^ ^ ^ n x ^ ^ a 2 2 ^ ^ ^ ^ ^ u n ^ 4 5 0 0
001	—	—	000017895
003	—	—	BeLU
005	—	—	20150810142958.0
008	—	—	0512160u ^ ^ ^ ^ 1 ^ ^ ^ 2001au ^ ^ ^ 0051216
009	—	a	Rétrocatalogage
040	—	a	BeLU
	—	b	fre
LKR	—	a	HOL
	—	b	000017699
	—	i	ULG01
852	4	a	BeLU
		b	BGP06
		j	HAA/ACR. 0081

852\$b: Library, 852\$c Location

Most often empty !

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Milestones for circulation policies in Alma

General Information ENUM/CHRON information Notes History

Barcode	500201122	Copy ID	-
Material type	Book	Item policy	-
Inventory date	13/06/2002	Provenance	-
PO line	-	Is Magnetic	No
Receiving date	13/06/2002	Expected receiving date	-
Enumeration A	-	Enumeration B	-
Chronology I	-	Chronology J	-
Description	-		
Receiving operator	import		
Process type	-		
Issue Date	-		

Location Information:

Permanent library	ALPHA-Sciences historiques	Permanent location	Salle de lecture
Alternative call number type	Other scheme	Alternative call number	-
Inventory number	50.500201122	Storage Location ID	-
Pages	-	Pieces	-

Item status

Most often empty !

Library and location



Milestones for circulation policies in Alma

LDR 00248nx a2200109un 4500

001 000017895

003 BeLU

005 20150810144537.0

008 0512160u 1 2001au 0051216

909 __|a Rétrocatalogage

040 __|a BeLU |b fre

852 4_ |a BeLU |b BGP06 |c PH010 || HAA/ACR. 0081

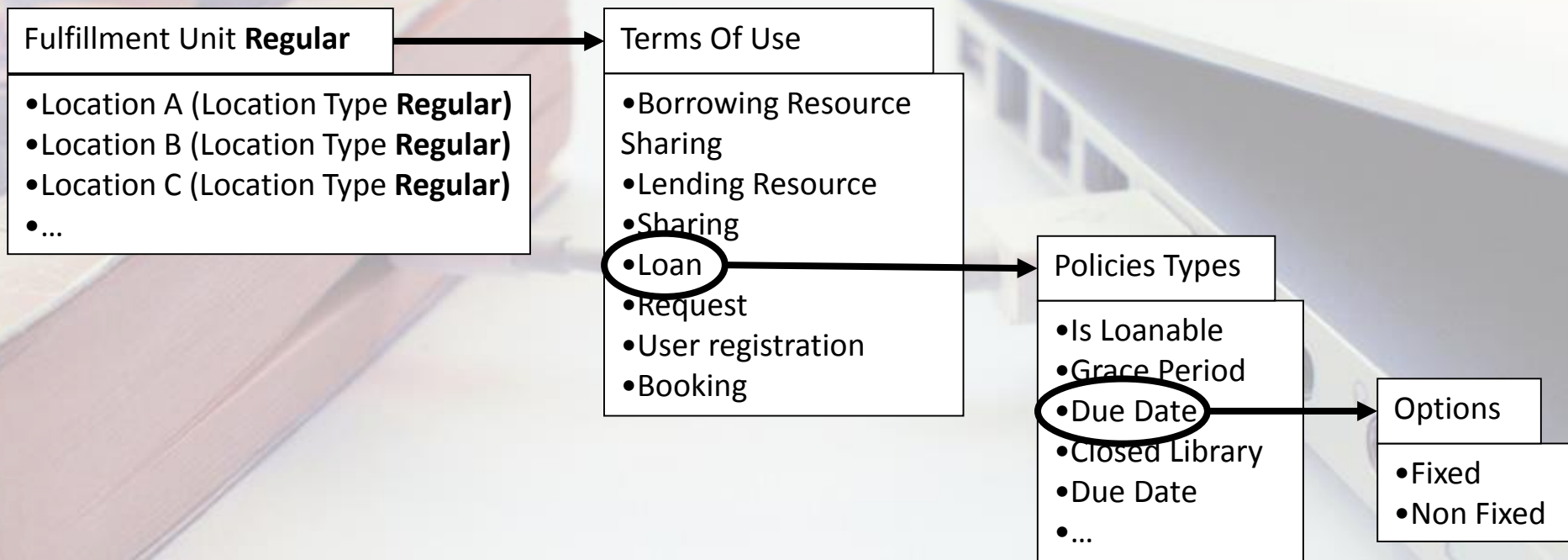
Library (852\$b) and location (852\$c)



Milestones for circulation policies in Alma

- 2 components
 - Patron Status
 - Location
- 1 Exception:
 - Item Policy

Milestones for circulation policies in Alma



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- **Main differences**
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Main differences

Circulation rules Criteria			
Aleph		Alma	
Mandatory	Optional	Mandatory	Exceptional
Patron Status		Patron Status	
Item Status			Item Policy
	Item Process Status		
Library		Library	
	Location	Location	

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Impacts on implementation activities

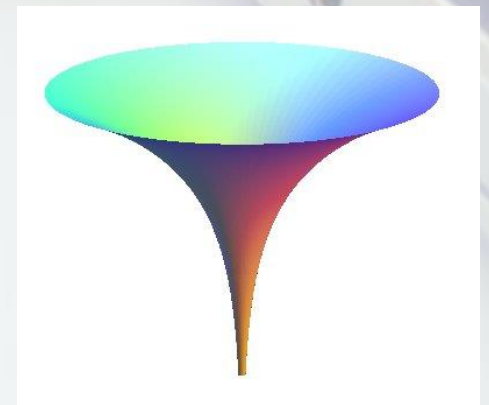
- Simplification of our physical fulfillment policies
- Locations reorganization
- Attach items to appropriate location

Impacts on implementation activities

1	Fulfillment Tables	
2		
3	Location Types	On Shelf Request Policy
4	General	Request for pickup anywhere regardless of availability
5	Limited	Request for pickup anywhere regardless of availability
6	Short Loan	Request for pickup in different library only
7	Media	Request for pickup in different campus only
8	Closed	No Requesting from available holding
9		No Requesting
10	Patron Types	
11	Faculty	
12	Staff	
13	Students	
14	Visitors	
15		
16	Item Exception Types	
17	1	
18		
19		
20		
21		
22		
23		

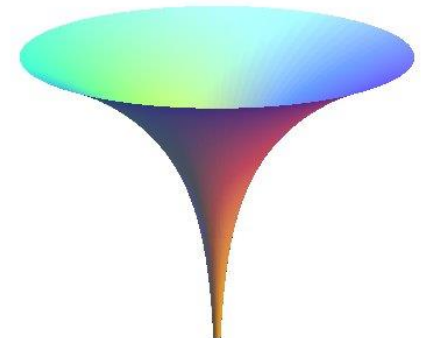
Impacts on implementation activities

- Simplification of our physical fulfillment policies
 - 5 Location types → Fulfillment Units
 - 4 Patron groups



Impacts on implementation activities

Fulfillment Tables	
Location Types	On Shelf Request Policy
Extended	Request for pickup anywhere regardless of availability
Regular	Request for pickup anywhere regardless of availability
Storage	Request for pickup anywhere regardless of availability
Short Loan	Request for pickup anywhere regardless of availability
Limited	No Requesting
Patron Types	
Faculty & Staff	
High Priority	
Regular Priority	
Low Priority	
Item Exception Types	
No loan - no request	
No request	



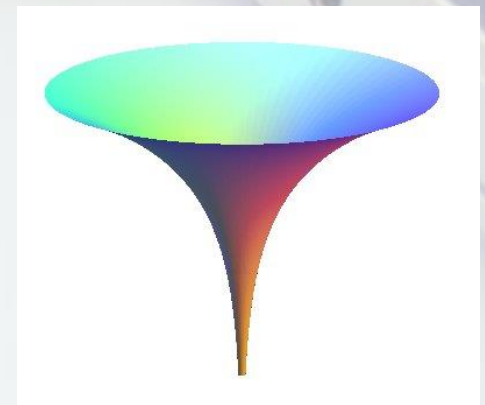
Impacts on implementation activities

2						
3	LOCATION TYPES CATEGORIES ↓	PATRON GROUPS →	Staff	High priority	Regular priority	Very Low priority
				Maîtrise	Bacheliers et extérieurs et	
4		traductions ↓ et →	Personnel + tous les doctorants		EP, Mettre tous les B en RP	Visiteurs
5	Extended	Empruntable LT	60 l, 3 mois, 3R	60 l, 3 mois, 1R	30 l, 1 mois, 1R	consultable
6	Regular	Empruntable normal	20 l, 1 mois, 3R	10 l, 1 mois, 1R	10 l, 1 mois, 1R	consultable
7	Storage	CONSULTABLE sur demande	15 l, 7 jours	10 l, 7 jours,	5 l, 7 jours	5 l, 7 jours
8	Short Loan	Empruntable CT	15 l, 7 jours, 3R	10 l, 7 jours, 1R	10 l, 7 jours, 1R	consultable
9	Limited	EMPRUNT 1 JOUR	3l, 1 jour	3l, 1 jour	3l, 1 jour	0
10	Institutionnal	Institutionnal				
11	* 1 TOU créé suppl. pour durées de consutation plus longues					
12	* 1 autre TOU créé suppl. pour Graulich: pas de prêts aux RP					

Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11	Column12
		Circulatable?	Recallable?	Loan Length	Loan Period	Requested Item Length	Requested Item Period	Recall Length	Recall Period	Renew Fee	Lost Item Fine
		N	N	0	Days	0	None	1	Month	0.00	
2. Institutional Policies & TOU											
Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11	Column12
Location Type	Patron Type	Circulatable?	Recallable?	Loan Length	Loan Period	Requested Item Length	Requested Item Period	Recall Length	Recall Period	Renew Fee	Lost Item
Extended	Faculty & Staff	Y	Y	3	Month						
Extended	High Priority	Y	Y	3	Month			1	Month		
Extended	Regular Priority	Y		1	Month						
Extended	Low Priority										
Regular	Faculty & Staff	Y		1	Month						
Regular	High Priority	Y		1	Month						
Regular	Regular Priority	Y		1	Month						
Regular	Low Priority										
Storage	Faculty & Staff			1	Week						
Storage	High Priority			1	Week						
Storage	Regular Priority			1	Week						

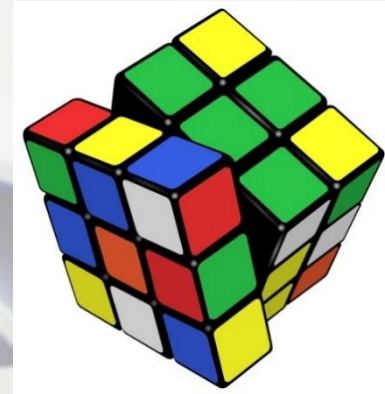
Impacts on implementation activities

- Simplification of our physical fulfillment policies
 - 5 Location types → Fulfillment Units
 - 4 Patron groups
 - 2 Item exception types → Items Policies
 - 1 Default Institutional TOU
- 25 TOUs < 605



Impacts on implementation activities

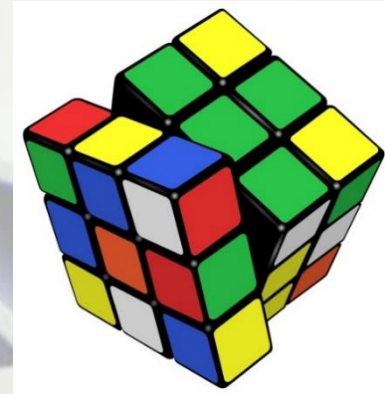
- Reorganization of locations
 - Adding Location Type



Library Code	Location Code	Name of Location	Location Type	External Name of Location	Circulation Desk Code
BST03	TS003	Libre accès	Extended		DEFAULT_CIRC_DESK
BST03	TS004	Réserve	Storage		DEFAULT_CIRC_DESK
BST03	TS005	Bureau du documentaliste	Regular		DEFAULT_CIRC_DESK
BST03	TS006	Bureau du prêt	Short Loan		DEFAULT_CIRC_DESK
BST03	TS007	Réserve - consultables		Réserve	DEFAULT_CIRC_DESK
BST03	TS014	Chimie appliquée- G. Heyen	Storage		DEFAULT_CIRC_DESK
BST03	TS018	COORDINATION	Storage		DEFAULT_CIRC_DESK
BST03	TS029	Génie chimique- JP. Pirard	Storage		DEFAULT_CIRC_DESK
BST07	TCO01	Réserve CP	Storage	Réserve	DEFAULT_CIRC_DESK
BST07	TCO02	Réserve ELT	Extended	Réserve	DEFAULT_CIRC_DESK
BST07	TCO03	Réserve ECT	Regular	Réserve	DEFAULT_CIRC_DESK
BST08	TCOM1	Réserve compactus CP	Storage	Réserve compactus BST	DEFAULT_CIRC_DESK

Impacts on implementation activities

- Reorganization of locations
 - Adding Location Type
 - Creating new locations



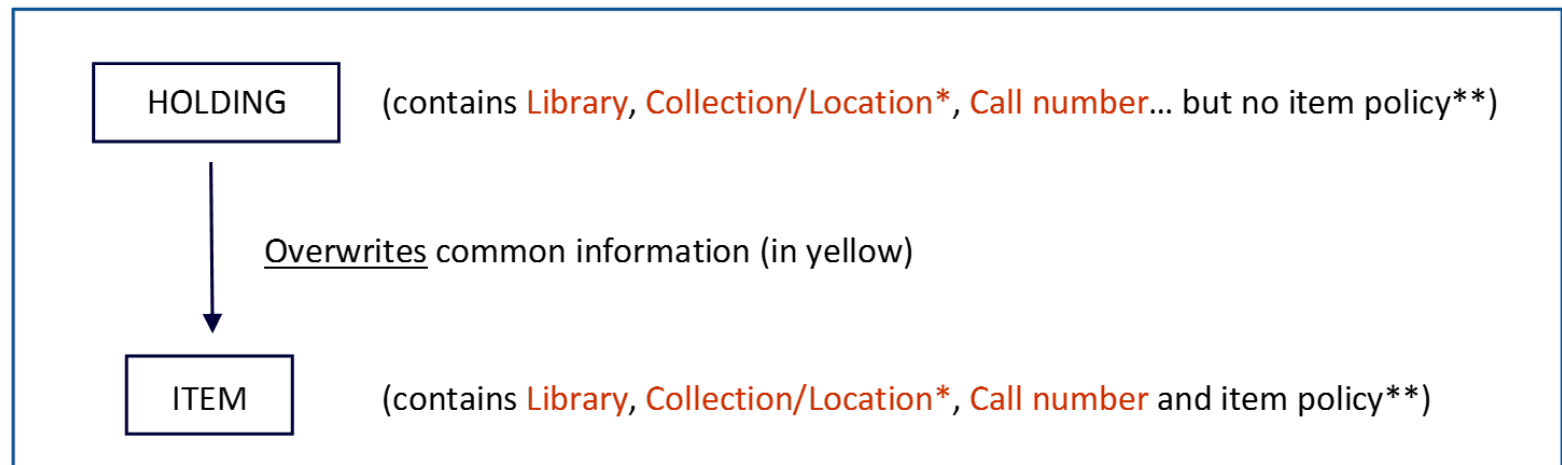
	Code	Name	Location Type	Fulfillment Unit
1	PG010	Armoires documents particuliers	Open	-
2	PG003	Armoires médias - SHORT LOAN	Open	Short Loan
3	PG001	Bureaux des bibliothécaires	Open	-
4	PG002	Collection du CIPA - EXTENDED	Open	Extended
5	PG004	Libre accès - EXTENDED	Open	Extended
6	PG014	Libre accès manuels didactiques - SHORT LOAN	Open	Short Loan
7	PG012	Libre-accès ouvrages de référence	Open	-
8	PG005	Libre accès périodiques	Open	-
9	PG006	Local serveur - REGULAR	Open	Regular
10	PG007	Présentoir	Open	-
11	PG011	Réserve précieuse	Open	-
12	PG013	Salle de travail collaboratif	Open	-
13	PG008	Travée réservée aux cours et travaux - LIMITED	Open	Limited
14	UNASSIGNED	unassigned location	Open	-

Impacts on implementation activities

- Attach items to the appropriate location
 - Adding locations (852\$c) before migration
 - Some batch processing impossible in Aleph



Impacts on implementation activities



*The collection/Location was the information we wanted to change

**The item policy was the criteria to use

Impacts on implementation activities

- Attach items to appropriate location
 - Adding locations (852\$c) before migration
 - Some batch processing impossible in Aleph
 - Finalizing in Alma



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Life after Go-Live and Conclusions

- **Benefits**

- Enlarged traffic
- Items tracking



Patron reported that
there is a spirit/
demon attached to
this book, and it
should be
destroyed.

- Pam, DSTC.

THROUGH
THE DARK
CONTINENT

STANLEY

214
786

Life after Go-Live and Conclusions

- Benefits

- Enlarged traffic
- Items tracking
- Less and less overdue loans



Life after Go-Live and Conclusions

- Benefits

- Enlarged traffic
- Items tracking
- Less and less overdue

- Lacks

- Time during implementation
- Batch processing incompatibility
- Vocabulary changes between implementation forms and Alma platform





Thank you

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