

Assigning Process Types

Welcome to this training session on assigning process types to your migrated physical items.

In Alma, a Process Type describes the status of a physical item, or what process it is going through, when it is "not in place," that is, not in its library location. There may be physical item statuses from your former ILS that don't directly migrate to a corresponding process type in Alma. Typical examples are "at bindery," "circulating review," or "missing."

Items with these statuses migrate as "not in place" with a process type of "Technical - Migration." The original status migrates to Internal Note 1 from all ILSs except Aleph or Voyager. (From Aleph or Voyager, item status migrates to Internal Note 3.) After migration, you can update these records to assign the items the correct Alma process type.

There are 4 typical workflows. All workflows involve creating a set and then running an Alma job. Depending on the statuses used in your former ILS, choose the workflows that apply to your situation. See the relevant migration guide for more information about which items will be assigned the Technical – Migration Process Type.

Workflow 1: Missing Items

First, we'll search for items which had a status of "Missing" in your former ILS and mark them "Missing" in Alma. Run an advanced search for physical items with a process type equal to "Technical - Migration" with an Internal Note 1 which contains Keywords the status you had in your former ILS.

For our example, the code is MISSING in all caps, but your Internal Note Search will be dependent upon your Item Base Status Tab of the Migration Form or the Aleph/Voyager statuses. Please consult your migration guide and/or forms.

(As we said before, if you are migrating from Aleph or Voyager, the relevant field will be Internal Note 3, for all of these workflows.)

We've completed our search with 49 items. Click Save Query to save this as a set.

Name the Set, and save.

Next, go to Admin, Run a Job.

Filter by content type Physical item.

Choose the Change Physical Items Job. Select the set we just saved. Click the checkbox next to Missing and choose missing from the dropdown. Then submit the job. This will change the process type of these 49 items from Technical - Migration to Missing.

Workflow 2: Work Order Departments

Next, we'll handle items which should be in an Alma Work Order Department. If you created work order types and departments in Alma during your testload, you can re-locate technical

migration items with statuses such as “At Bindery”, “At Digitization Department” or “Damaged” to your work order department.

First, we’ll search for items which had a status of “DIGITIZATION_DEPT” in your former ILS. From a Physical Items Search, search for all items with an Internal Note 1 where Keywords contains the status you had in your former ILS. For our example, the code is DIGITIZATION_DEPT in all caps, but, as we said before, your Internal Note Search will be dependent upon your particular codes from your migration.

We’ve completed our search with 6 items. Click “Save Query” to save this as a set.

Name the set, and save.

With this set, we will run two jobs. One to clear the technical migration process type, and one to create a digitization work order.

To clear the technical migration process type: Go to Admin >> Run a Job >>

Filter for content type: physical item.

Select the job Change Physical Items. Click the checkbox next to Missing status but leave the dropdown empty (Do NOT choose Missing from the dropdown). This will clear the status. Submit the job.

The technical migration process type has been cleared from all the items in our set. We can now move these items to the work order department. Go to Admin >> Run a Job >> Create physical item work orders.

Choose the set you saved.

Choose the work order type and department. We’ll choose Work Order Type: Digitization and Work Order Department: Digitization Department for Institution. If these items are already physically in the department, make sure to check “Do Not Pick from Shelf.” We’ll do that since we’ll assume these items are already in our digitization department and we don’t need them to show up on our pick list to send to the Digitization Department. Click Next. Review and Submit the job.

Now these items all have a process type of “Digitization.”

[Workflow 3: Relocating Items](#)

Next, we may have items that need to be re-located. For example, if we had statuses of transit, in a temporary location, or move requests in our former ILS, these items may need to be updated in Alma.

In this example, we’ll search in Physical items, Internal note 1 for the items which had the status of RESERVE in your former ILS.

We’ve completed our search with 8 items. Click Save Query to save this as a set.

Now go to Admin, Run a Job.

Filter for Content type: Physical item.

When choosing a job, consider if the items need to be moved, or if the items are already in the correct physical location.

If these items need to be physically moved to a temporary reserve location, we may want to use the “Create physical item move requests” job to trigger a move request. This process will expect the item to be in transit to a new location and will require a “Scan In” operation to show the item as “in place.”

If the items have already been relocated, we will want to use the “Change Physical Items” job instead. This changes the physical item record, which will immediately show the updated location.

Let's say we have items that migrated in their permanent location, but we want to place them temporarily on reserve. The items are already physically in place so we're going to run the “Change Physical Items” Job.

Choose the set you just saved.

(If the items are permanently on reserve, we can permanently change the location.) For our example, we'll say that these items are only on reserve for the semester, so we'll click the checkbox next to “Set item temporary indication to” and mark “Yes.” We'll also click the checkbox next to “Temporary Location” and we'll choose “Main Library Course Reserves” as the temporary location. We will also click the checkbox next to Missing status and leave the dropdown blank to clear the status. Review and submit the job.

These items now have no process type, and they have the correct temporary location.

Workflow 4: Items that are in place

Lastly, we'll remove the “Technical Migration” process type in bulk. If we have items in Technical - Migration that should display as “in place” in Alma and none of the other workflows we've shown make sense, you may just want to remove the Technical - Migration process type.

From a Physical Items Search, search for all items with an Internal Note 1 contains Keywords: the status you had in your former ILS. For our example, the code is REVIEW in all caps.

We've completed our search with 5 items. Click Save Query to save this as a set.

Now, go to Admin, Run a Job. We need the job Change Physical Items. Filter the Content type to Physical items. Choose the job Change Physical Items. Choose the Set you just made. Now we go to the field called Missing status. Click the checkbox, but leave the field blank. This will clear the status. Review and submit the job.

The technical migration process type has been cleared from all the items in our set.

We showed you four workflows that you can use to change the process type of Technical – Migration to something that accurately reflects the status of these physical items.

Thanks for joining us.