Alma Administration – Resources  
Configuring Physical Items

Hello, catalogers generate item descriptions for physical items, usually serials and subscription monographs, when receiving them. This allows Alma to treat each issue as a unique copy.

In this session you will learn how to configure a template rule that is used to generate and format the item description, how to update item descriptions in bulk using a job, and how to sort items by description, using sort routines.

To configure a description template rule, go to Configuration 🡪 Resources 🡪 General 🡪 Description Templates.

The Institution Rules list is a list of template rules for our institution to generate physical item descriptions. Alma will run the institution rules from top down, in this order. You can change the order using the move up and move down arrows.

If none of these rules apply to an item, Alma will use this default rule to generate a description.

Now, let's create a description template rule that will generate an item description which will include the volume, issue number, year and month.

To add a new rule, you can either choose Add Rule and create one from a blank form , or duplicate an existing one by choosing Duplicate from the row action list. Let's duplicate an existing rule and modify it according to our needs.

In the Description Template setup Page, enter a template name, and description if you need. Our name will show the information this template will include: vol, number, year and month, and the description will show how it will look. Again, vol, dot, Number, dot and in parentheses, year and month.

Now, fill in the input parameters. Choose Add parameter. The input parameters indicates which items you want this rule to apply on. It can be items in a certain library, or items with the existence of certain parameters. You can add more than one parameter to your rule. We would like this rule to apply to issues that contains the fields we need..So choose material type, InList, Issue. And add the parameters for the data we need.

From the output parameters, Alma will create the description. Enter the fields you want to display in the description, with a prefix and a suffix. Alma will fill the fields with the values entered in the new item details fields.

In our example we want to show 4 fields: vol, number of issues, year, and month. and we know they're entered in fields EnumerationA, EnumerationB, ChronJ and ChronI in the item record.

Note that all chosen fields must be present in the item record for the description template to be correctly formatted. You can read more about the fields and parameters on the Receiving Physical Material article in the On line help.

Now let's add the necessary prefix and suffix fields. Once you're done, you can check the new template by choosing Show template. Alma will show it to you. If you're happy with it, click Save.

Later, you can come back here, and from the row action list of each rule, you can either edit or delete them as needed.

If you've edited a rule, and you would like to retroactively rebuild item description fields in bulk you can do it by running the Rebuild Physical item description job.

First create the set of item records you want to change, and then go to Alma 🡪 Admin 🡪 Manage Jobs and Sets and Run a Job. Search for Description and choose Rebuild Physical Item Description. Click Next, choose the set you've created, click Next again, and Submit.

You can refresh and see the job’s progress, and when it is finished it will display on the History tab as completed.

Once the item description is created, you can use it to sort the physical items display in different places in Alma. You can do it using a sort routine. Let's add a new sort routine that sorts by description.

In the Configuration menu go to Resources🡪 General🡪Physical Items Sort Routines. This is the existing ones.

Click Add sort routine, enter a name and description, next.

Select Ascending or Descending order, in our case ascending, choose the field or fields by which you want to sort, which is Description in this case and click add to selection.

Click next, select the areas in Alma in which you want this sort to be available – let's choose the receiving workbench and the item editor. Set it as default at each of them if you want it to be the default sort of the items , and Save.

Now in Alma when searching for a physical titles, and view the items you can see the new sort routine is available, and is the default.

Now you can create a new description rule, apply it in bulk, and use the description as a sort routine.

Thanks for watching!