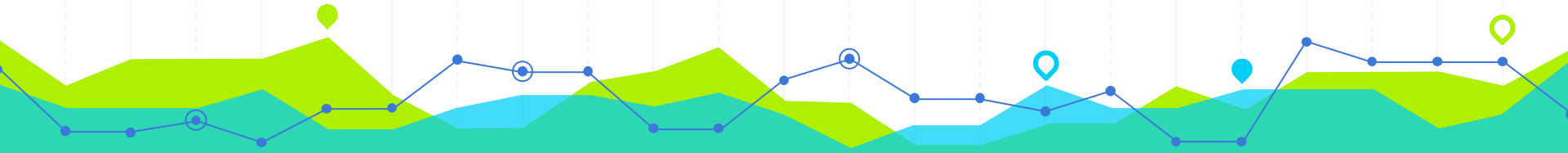
Aeon2Alma

Distinctive Collections Reading Room Management Through Alma



Dhanushka Samarakoon
Eduardo Prieto
José Vila

MIAMI LIBRARIES | Transforming lives OPENING WORLDS

Background

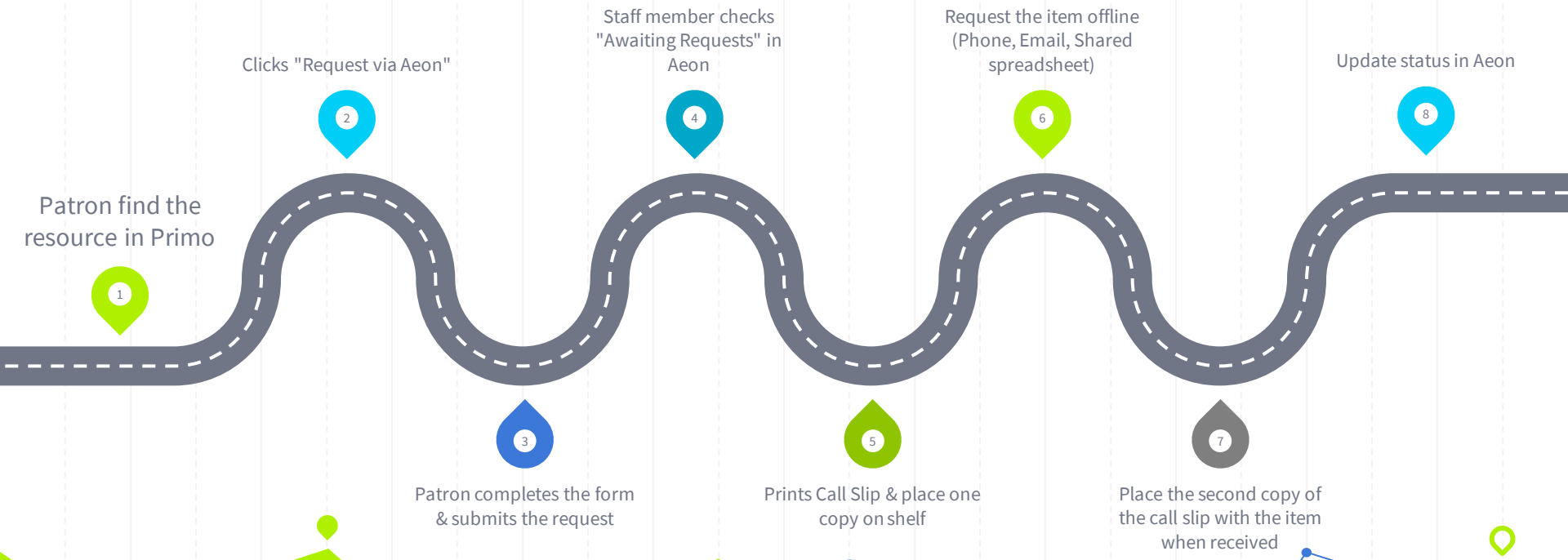
Organizational Units

- Special Collections
- University Archives
- Manuscripts & Archives
- Cuban Heritage Center
- Architectural Resource Center

Physical Locations

- Main Library (Richter)
- Architecture Library
- Off-Site Storage (Miami Lakes)

Legacy Process



Aeon

- Logoff dsamarakoon
- Main Menu
- New Requests
  - Book
  - Periodical
  - Manuscripts, Archives and Others
- View
  - Review Requests
  - Outstanding Requests
  - Cancelled Requests
  - History Requests
  - All Requests
- Orders
  - Order Billing
  - Delivered Items
- Events
  - Events

Outstanding Requests

TN	Title	Author/Creator	Call Number	Volume/Box	Status	Order Status
139336	Abel González Melo Collection	González Melo, Abel, 1980-	CHC5287	Abel González Melo Collection> Box: Box 01 - CHC Stacks -- Range 42.1 -- Section B -- Shelf 9 -- 1 Box	Awaiting Request Processing	

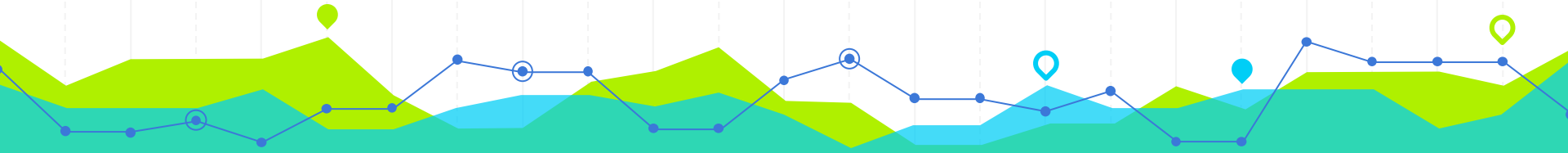
© 2021 Atlas Systems, Inc. All Rights Reserved.

AtoM Workflow

Activities Workflow

- List of Activities
- Activity Parameters
  - Date Range
  - Items being used
  - Users
- Clone Activity

Issues



- Lack of Inventory Management
- Siloed Systems

Goals

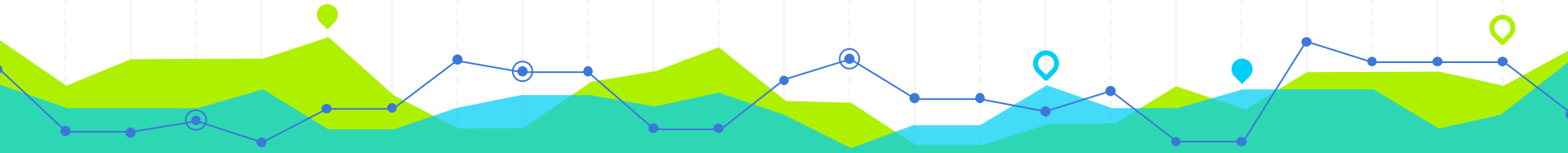
Better Tracking

Single Point-of-Service

Unified Staff Operations

Alma

Reading Room Bookings

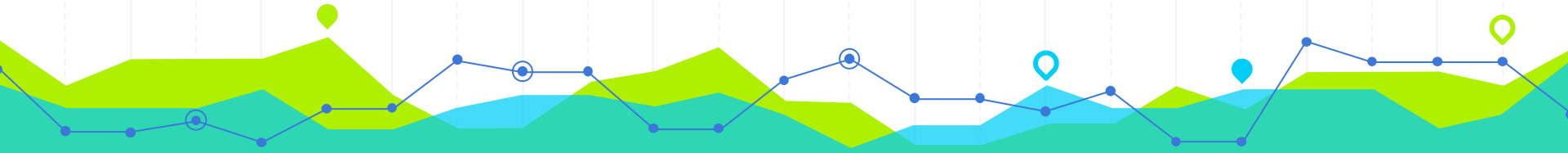


Aeon2Alma
Working Group

Goals:

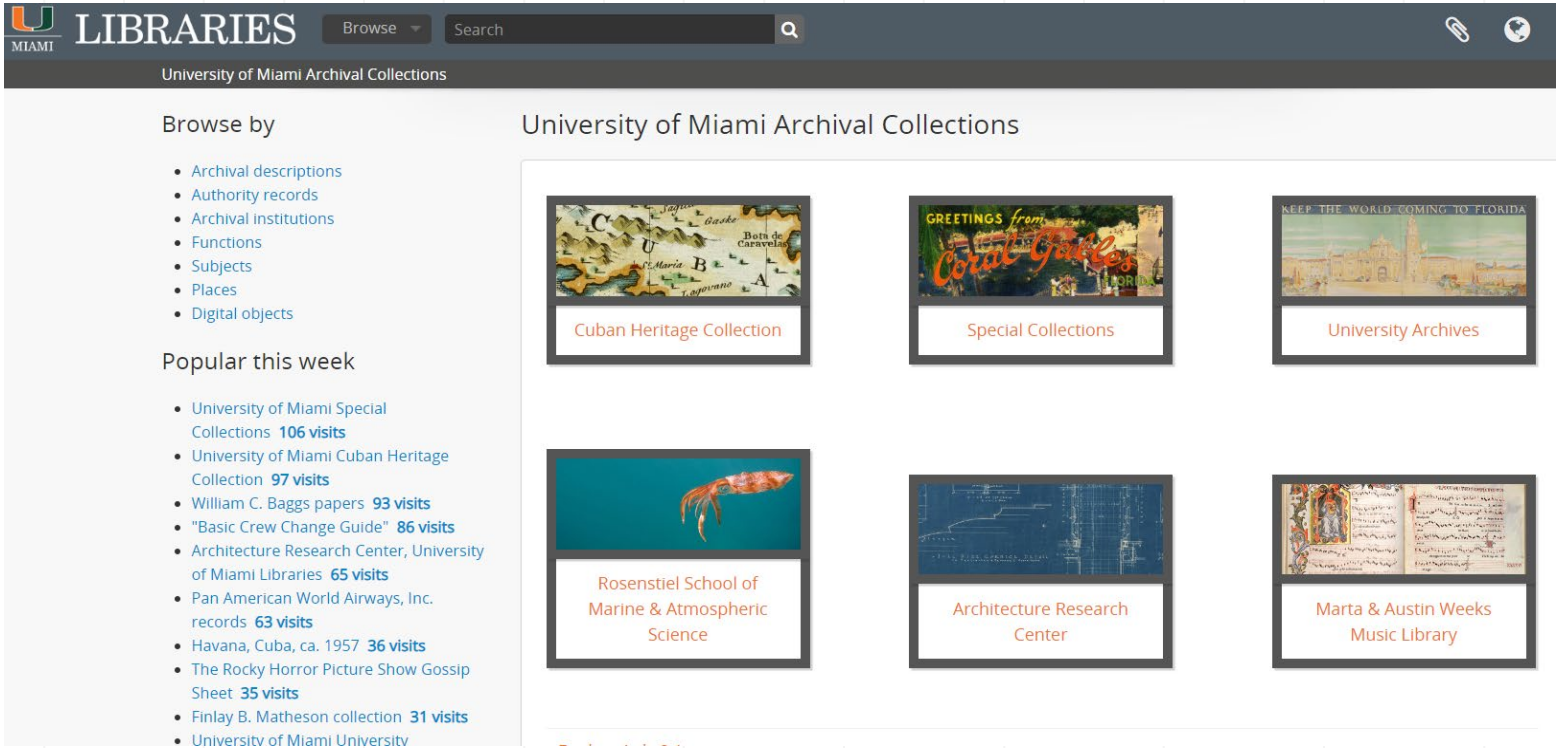
1. Help with the transition from Aeon to Alma.

2. Help researchers whose primary method of locating information resources is via Primo.



Migration of Archival Collection Records from AtoM to ALMA

How is the information presented in AtoM?



University of Miami Archival Collections

UNIVERSITY OF MIAMI UNIVERSITY ARCHIVES

Search our collection

Search

Browse our collection

Browse 225 holdings

Academic Deans' Council minutes
Alumni Association records
Archie McNeal scrapbooks
Atomic-bombed roof tiles from Hiroshim...
Beaux Arts scrapbooks
Betty Goff and John Galbraith scrapbook
Bowman Foster Ashe family papers
Campus Planning and Development Offic

University of Miami University Archives

Repository » University of Miami University Archives

Identity area

Identifier	US-FQG
Authorized form of name	University of Miami University Archives

Contact area

Nicholas Iwanicki PRIMARY CONTACT

Address
Street address:
University of Miami Libraries
1300 Memorial Drive
Locality: Coral Gables
Region: FL
Country name: United States
Postal code: 33146

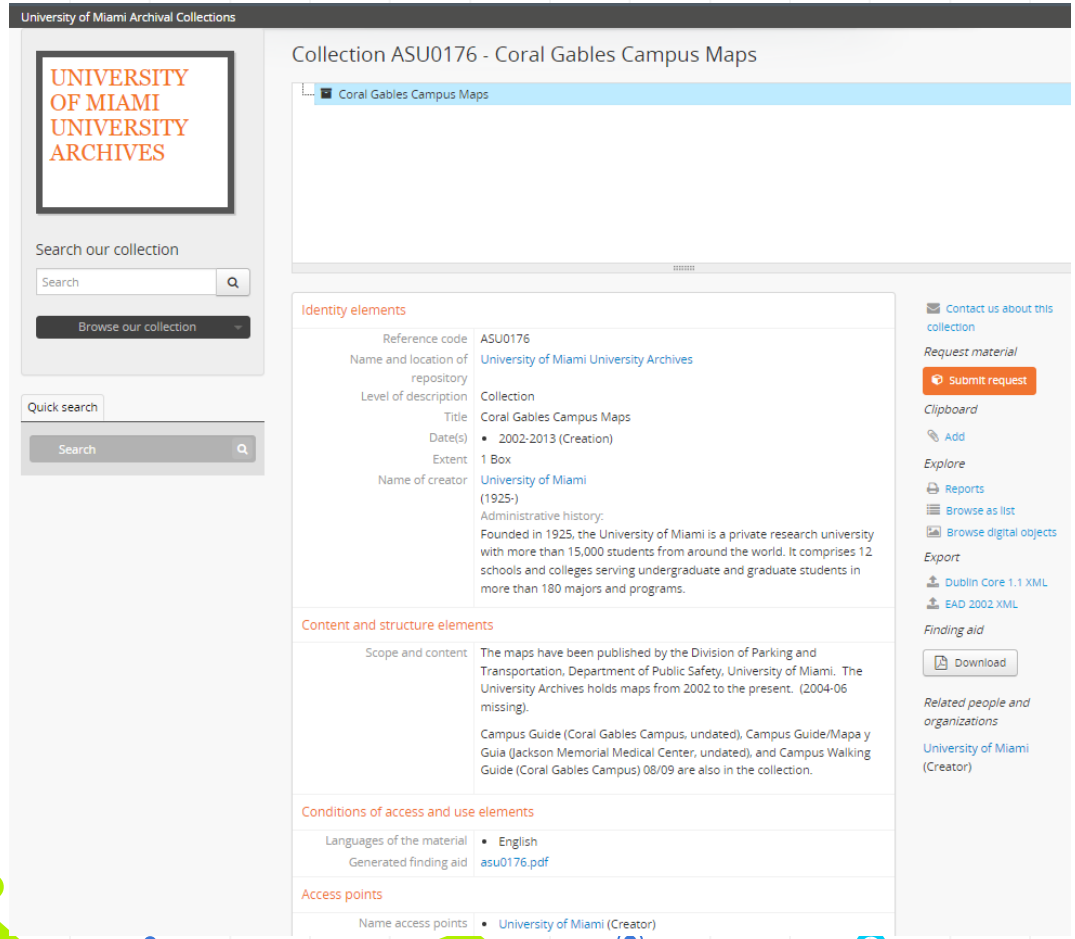
Clipboard

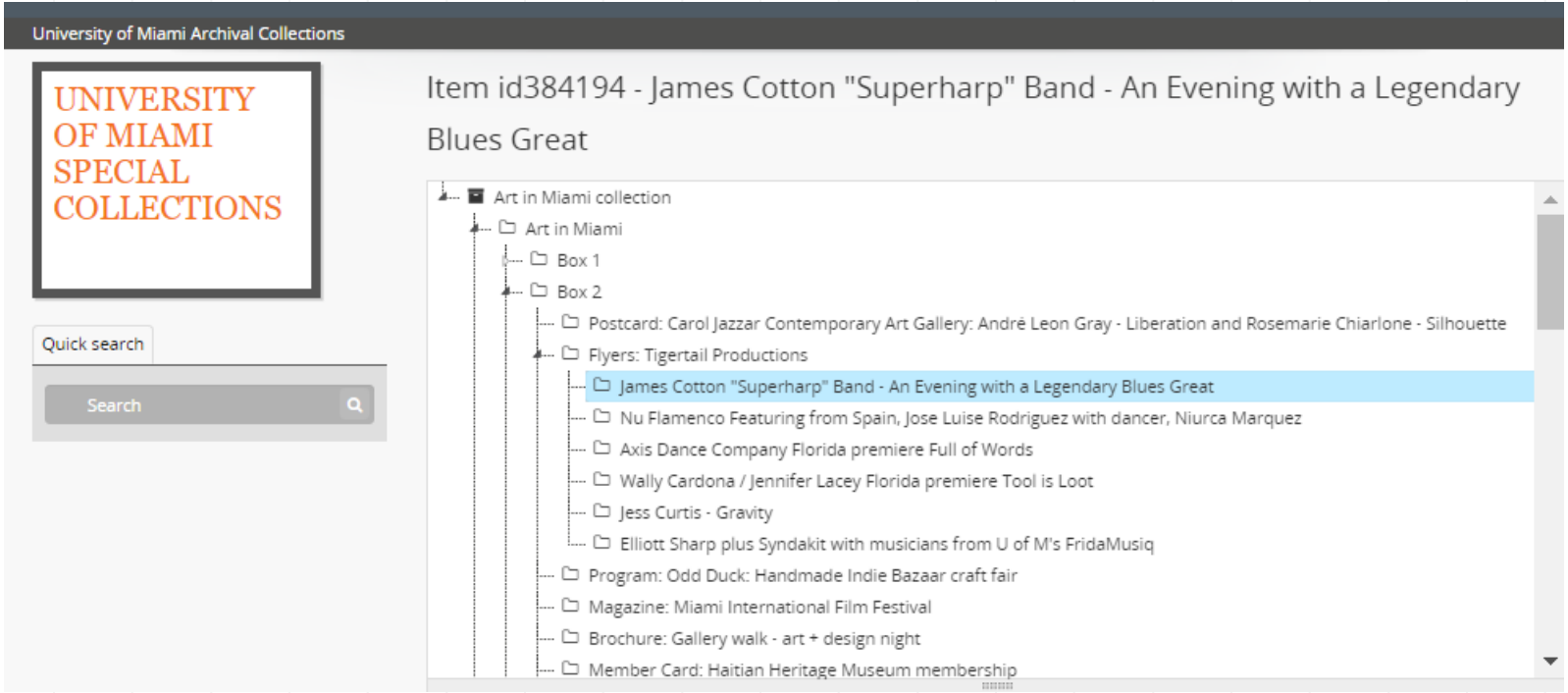
Add

Primary contact

University of Miami Libraries 1300 Memorial Drive
Coral Gables, FL
US 33146

Website Email


University of Miami Archival Collections
UNIVERSITY OF MIAMI UNIVERSITY ARCHIVES
Search our collection
Search
Browse our collection
Quick search
Search
Collection ASU0176 - Coral Gables Campus Maps
Coral Gables Campus Maps
Identity elements
Reference code ASU0176
Name and location of repository University of Miami University Archives
Level of description Collection
Title Coral Gables Campus Maps
Date(s) 2002-2013 (Creation)
Extent 1 Box
Name of creator University of Miami
(1925-)
Administrative history:
Founded in 1925, the University of Miami is a private research university with more than 15,000 students from around the world. It comprises 12 schools and colleges serving undergraduate and graduate students in more than 180 majors and programs.
Content and structure elements
Scope and content The maps have been published by the Division of Parking and Transportation, Department of Public Safety, University of Miami. The University Archives holds maps from 2002 to the present. (2004-06 missing).
Campus Guide (Coral Gables Campus, undated), Campus Guide/Mapa y Guia (Jackson Memorial Medical Center, undated), and Campus Walking Guide (Coral Gables Campus) 08/09 are also in the collection.
Conditions of access and use elements
Languages of the material English
Generated finding aid asu0176.pdf
Access points
Name access points University of Miami (Creator)
Contact us about this collection
Request material
Submit request
Clipboard
Add
Explore
Reports
Browse as list
Browse digital objects
Export
Dublin Core 1.1 XML
EAD 2002 XML
Finding aid
Download
Related people and organizations
University of Miami (Creator)


University of Miami Archival Collections
UNIVERSITY OF MIAMI SPECIAL COLLECTIONS
Quick search
Search
Item id384194 - James Cotton "Superharp" Band - An Evening with a Legendary Blues Great
Art in Miami collection
Art in Miami
Box 1
Box 2
Postcard: Carol Jazzar Contemporary Art Gallery: André Leon Gray - Liberation and Rosemarie Chiarlone - Silhouette
Flyers: Tigertail Productions
James Cotton "Superharp" Band - An Evening with a Legendary Blues Great
Nu Flamenco Featuring from Spain, Jose Luise Rodriguez with dancer, Niurca Marquez
Axis Dance Company Florida premiere Full of Words
Wally Cardona / Jennifer Lacey Florida premiere Tool is Loot
Jess Curtis - Gravity
Elliott Sharp plus Syndakit with musicians from U of M's FridaMusiq
Program: Odd Duck: Handmade Indie Bazaar craft fair
Magazine: Miami International Film Festival
Brochure: Gallery walk - art + design night
Member Card: Haitian Heritage Museum membership

<ead> Encoded Archival Description

What is it?

- XML standard for encoding archival finding aids maintained by the Society of American Archivists and the LoC.
- EAD reflects the hierarchical structure of archival collections, and allows for describing both the collection as a whole and its individual parts.

```
<?xml version="1.0" encoding="utf-8"?>
<!DOCTYPE ead PUBLIC "+//ISBN 1-931666-00-8//DTD ead.dtd (Encoded Archival Description (EAD) Version 2002)//EN"
<ead>
  <eadheader langencoding="iso639-2b" countryencoding="iso3166-1" dateencoding="iso8601" repositoryencoding="iso
    <eadid identifier="ArchonInternalCollectionID:1241" countrycode="US" mainagencycode="US-US-FQG" url="https:/
    <filedesc>
      <titlestmt>
        <titleproper encodinganalog="title">Marta and Austin Weeks Music Library and Technology Center Dedicatio
      </titlestmt>
      <publicationstmt>
        <publisher encodinganalog="publisher">University of Miami University Archives</publisher>
        <address>
          <addressline>University of Miami Libraries<lb/>1300 Memorial Drive</addressline>
          <addressline>Coral Gables</addressline>
          <addressline>FL</addressline>
          <addressline>United States</addressline>
          <addressline>33146</addressline>
          <addressline>Telephone: (305) 284 8129</addressline>
          <addressline>Fax: (305) 284 4027</addressline>
          <addressline>Email: k.tasa@miami.edu</addressline>
          <addressline>https://library.miami.edu/universityarchives/</addressline>
        </address>
        <date normal="2018-05-17" encodinganalog="date">2018-05-17</date>
      </publicationstmt>
    </filedesc>
    <profiledesc>
      <creation>
      Generated by Access to Memory (AtoM) 2.4.0      <date normal="2021-08-26">2021-08-26 21:20 UTC</date>
    </creation>
      <langusage>
        <language langcode="eng">English</language>
      </langusage>
    </profiledesc>
  </eadheader>
  <archdesc level="collection" relatedencoding="ISAD(G)v2">
    <did>
      <physloc id="physloc0001">ASC Stacks -- Range 22 -- Section A -- Shelf 6 -- 1 Box</physloc>
      <container type="box" parent="physloc0001">
                Box 1              </container>
      <unittitle encodinganalog="3.1.2">Marta and Austin Weeks Music Library and Technology Center Dedication Ce
      <unitid encodinganalog="3.1.1" countrycode="US" repositorycode="US-FQG">ASU0045</unitid>
      <unitdate encodinganalog="3.1.3">2005</unitdate>
      <physdesc encodinganalog="3.1.5">
        1 Items    </physdesc>
      <repository>
        <corpname>University of Miami University Archives</corpname>
        <address>
          <addressline>University of Miami Libraries<lb/>1300 Memorial Drive</addressline>
          <addressline>Coral Gables</addressline>
          <addressline>FL</addressline>
          <addressline>United States</addressline>
          <addressline>33146</addressline>
          <addressline>Telephone: (305) 284 8129</addressline>
          <addressline>Fax: (305) 284 4027</addressline>
          <addressline>Email: k.tasa@miami.edu</addressline>
          <addressline>https://library.miami.edu/universityarchives/</addressline>
        </address>
```

Migration Process from AtoM (EAD) to Alma (MARC)

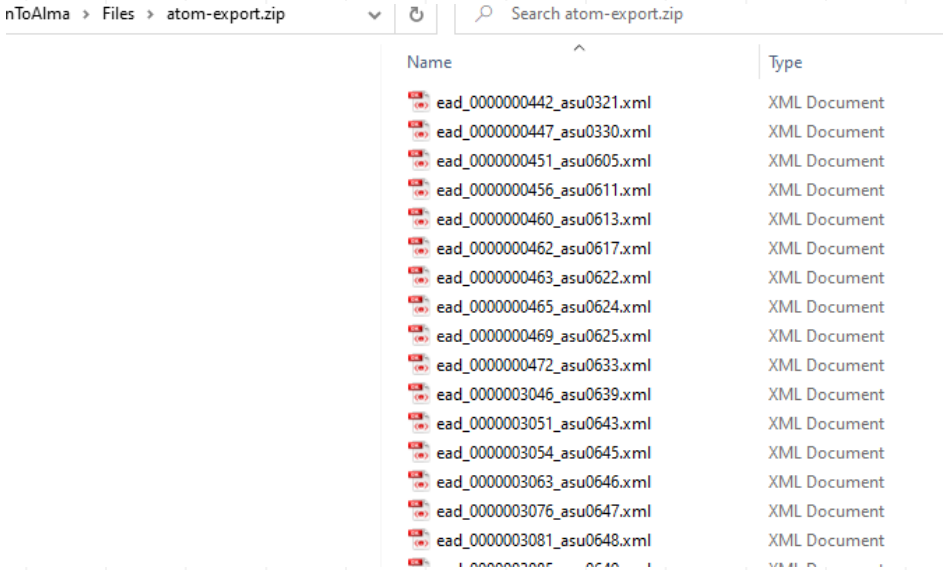
DACS element	MARC field/EAD element
	LDR
	008
2.1.4 Repository identifier	040 $$a FQG
2.1.3 Local identifier	099 $$a <archdesc><unitid>
2.6 Name of Creator(s)	100 1_ $$a <origination><persname> OR <origination><famname>, $$2 creator.
2.6 Name of Creator(s)	110 2_ $$a <origination><corname>, $$e creator.
2.3 Title	245 10 $$a <unittitle>, $$f <unitdate>
2.4 Date	264 _0 $$c <unitdate>
2.5 Extent	300 $$a <physdesc>
4.1 Conditions Governing Access	506 1_ $$a <accessrestrict>
3.1 Scope and Content	520 2_ $$a <scopecontent>
2.2 Name and Location of Repository	524 $$a Cite as: <repository><corpname>, <unittitle>
4.4 Conditions Governing Reproduction and Use	540 $$a Permission to publish, quote, or reproduce must be secured from the repository and the copyright holder.
2.7 Admininstrative/Biographical History	545 $$a <bioghist> (ask archivists, could be too long)
4.5 Languages and Scripts of the Material	546 $$a Text in <langmaterial><language>
4.6 Finding Aids	555 0_ $$a Finding aid contains complete full description of the collection: $$u <eadid>@url
	588 0_ $$a For full and complete information, please consult the finding aid.
	599 $$a [code based on repository: ASU|ASC|CHC|ARC|MAR|MUS]
Subjects	653 _0 $$a <controlaccess><coprname> OR <famname> OR <geogname> OR <name> OR <persname> OR <subject> OR <title>
	655 _4 $$a <controlaccess><genreform>
2.6 Name of Creator(s)	700 1_ $$a <origination><persname> OR other, $$e creator.
2.6 Name of Creator(s)	710 1_ $$a <repository><corpname>, $$e host institution.
	856 42 $$z Finding Aid $$u <eadid>@url

Mapping between EAD and MARC based on DACS

https://saa-ts-dacs.github.io/dacs/09_appendices/03_appendix_c_crosswalks.html#dacs-to-ead-and-marc

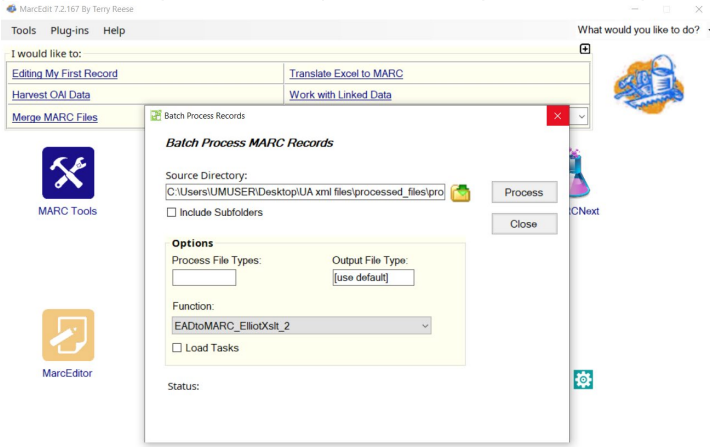
Exporting EAD xml records from AtoM

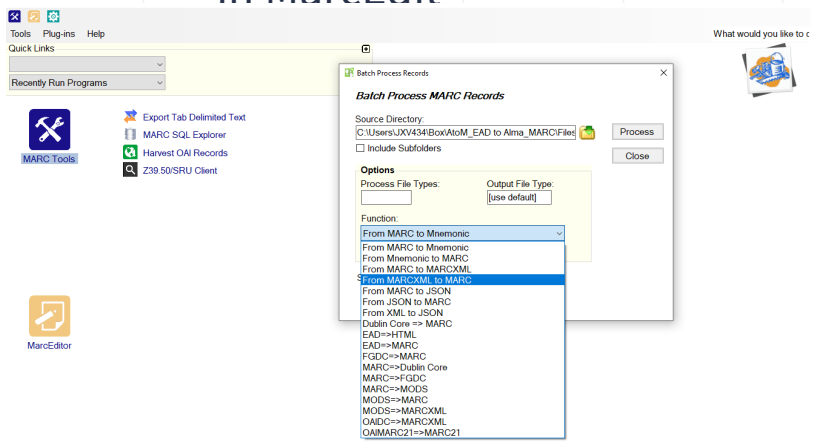
- In AtoM, run the export tasks available from the server
- Export by repository



MarcEdit Transformations (EAD>MARCXML>MARC)

- From EAD to MARCXML
  - Customize XSLT for the EAD-MARC transformation in MarcEdit
- From MARCXML>MARC
  - Running a second transformation in MarcEdit





Cleaning up and enhancing the resulting MARC records

- Combine all MARC records into 1 single file using MARCJoin function.
- Manual clean-up activities in the MarcEdit Editor.

Importing MARC records into Alma

Match method based on Collection ID (024)

Import Profile Details

Profile Details | Normalization & Validation | Match Profile | Set Management Tags | Inventory Information | Mapping

Profile Details

Profile name	UA repository - Archival Records from AtoM		
Profile description	UA repository - Archival Records from AtoM		
Originating system	AtoM	File name patterns	-
Import Protocol	Upload File/s	Cross walk	No
Physical source format	Binary		
Encoding format	UTF-8		
Source format	MARC21 Bibliographic	Target format	MARC21 Bibliographic
Status	Active		

Import Profile Details

Profile Details | Normalization & Validation | Match Profile

Match Profile

Match by Serial / Non Serial	No
Match Method	024 / 035 Match Method

Match Actions

Handling method	Automatic
Upon match	Do Not Import
Single match - match only record with the same inventory type (electronic/physical)	No

MERGE/OVERLAY

024 Other Standard Identifier (R)

Main issues/challenges

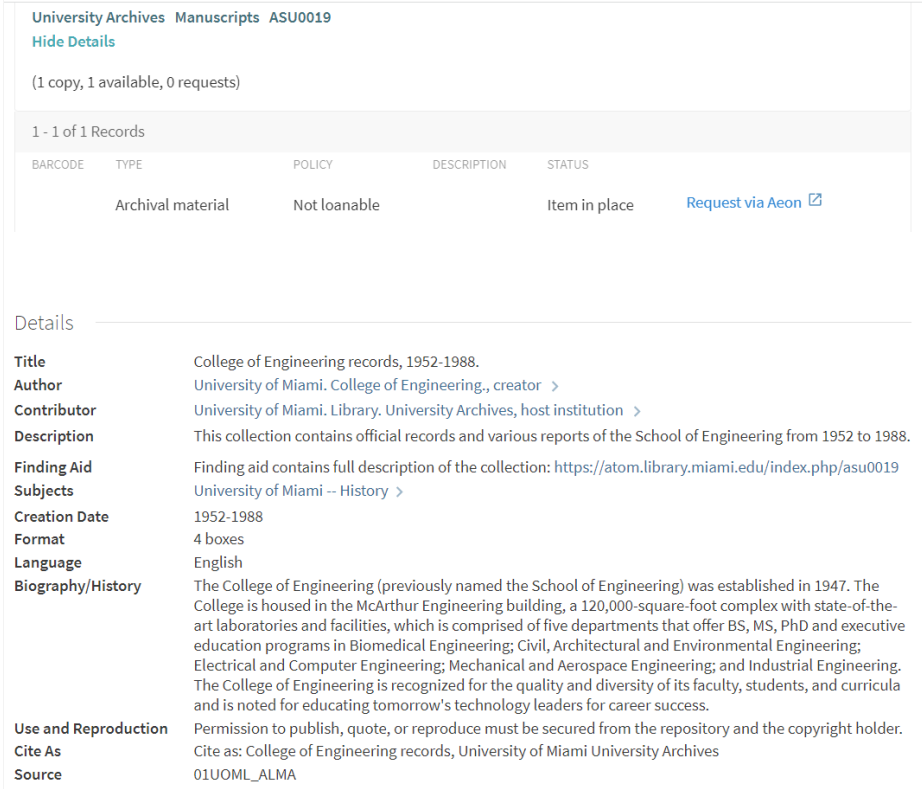
Tension between archival and bibliographic descriptions

Fundamentally, we're trying to make two different models of description (the archival and the bibliographic) be equal.

Tedious process

- You need to be familiar with MarcEdit
- Probably need to customize the transformation to match your needs
- A lot of clean-up/editing is needed

Final result



AtoM -> Primo Link

- Use Collection ID as the main search parameter
- Issues with direct to item addressed later

Template:

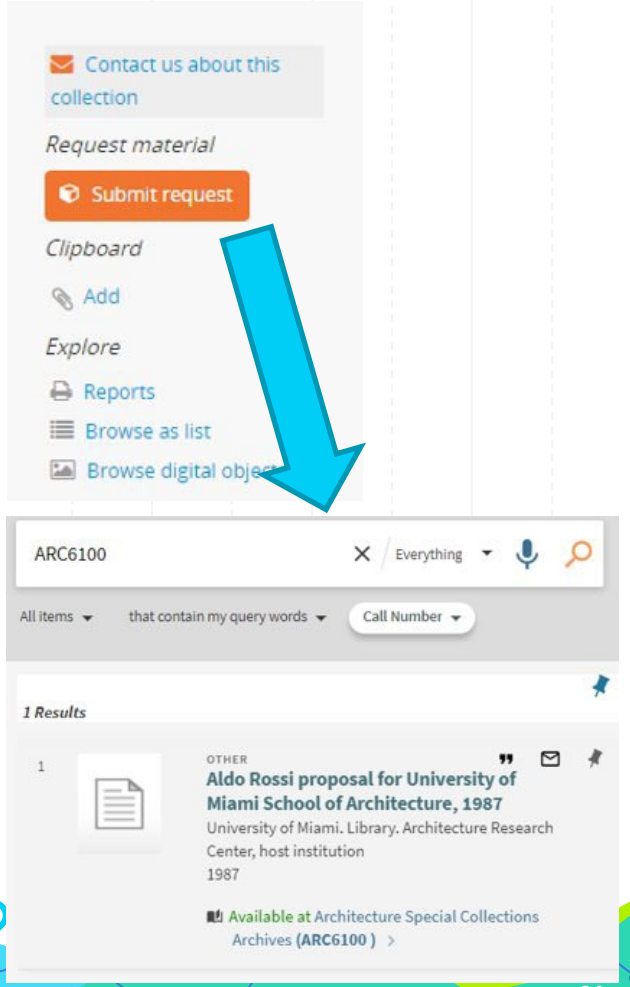
- https://miami-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=uml_new&query=lsr06,contains,<EAD ID>

EAD ID example:

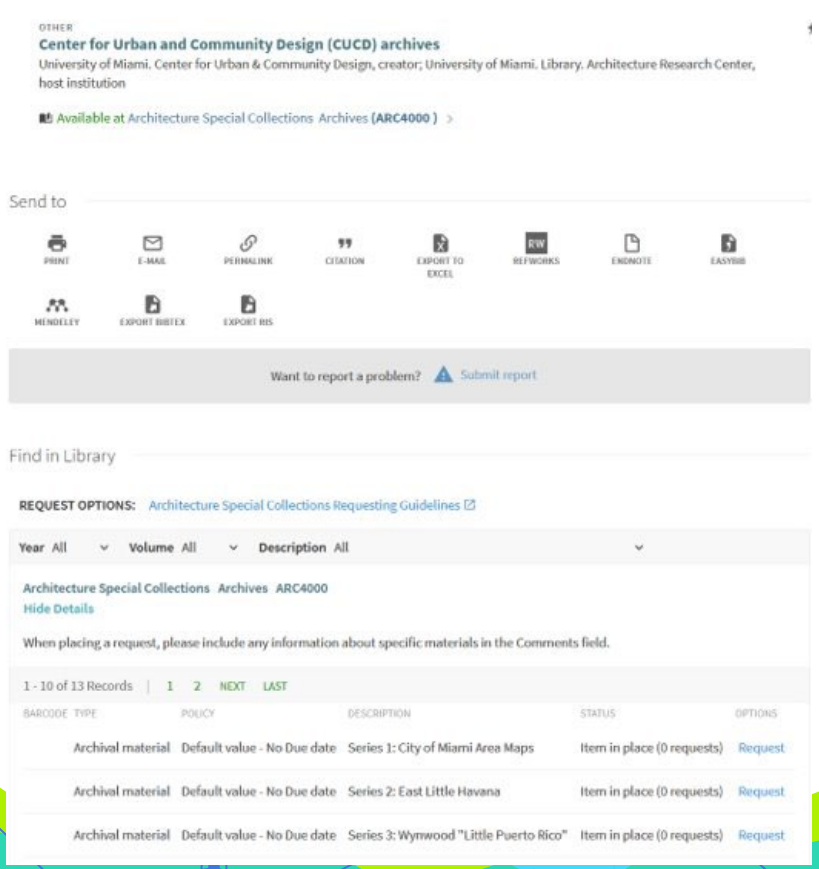
- https://miami-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=uml_new&query=lsr06,contains,ARC1000

Title example:

- https://miami-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=uml_new&query=any,contains,Alan%20Crockwell%20collection



AtoM Deep Link Issues



OTHER

Center for Urban and Community Design (CUCD) archives

University of Miami. Center for Urban & Community Design, creator; University of Miami. Library. Architecture Research Center, host institution

Available at Architecture Special Collections Archives (ARC4000)

Send to

PRINT E-MAIL PERMALINK CITATION EXPORT TO EXCEL REFWORKS ENDNOTE EASYBIB MENDELEY EXPORT BIBTEX EXPORT RIS

Want to report a problem? Submit report

Find in Library

REQUEST OPTIONS: Architecture Special Collections Requesting Guidelines

Year All Volume All Description All

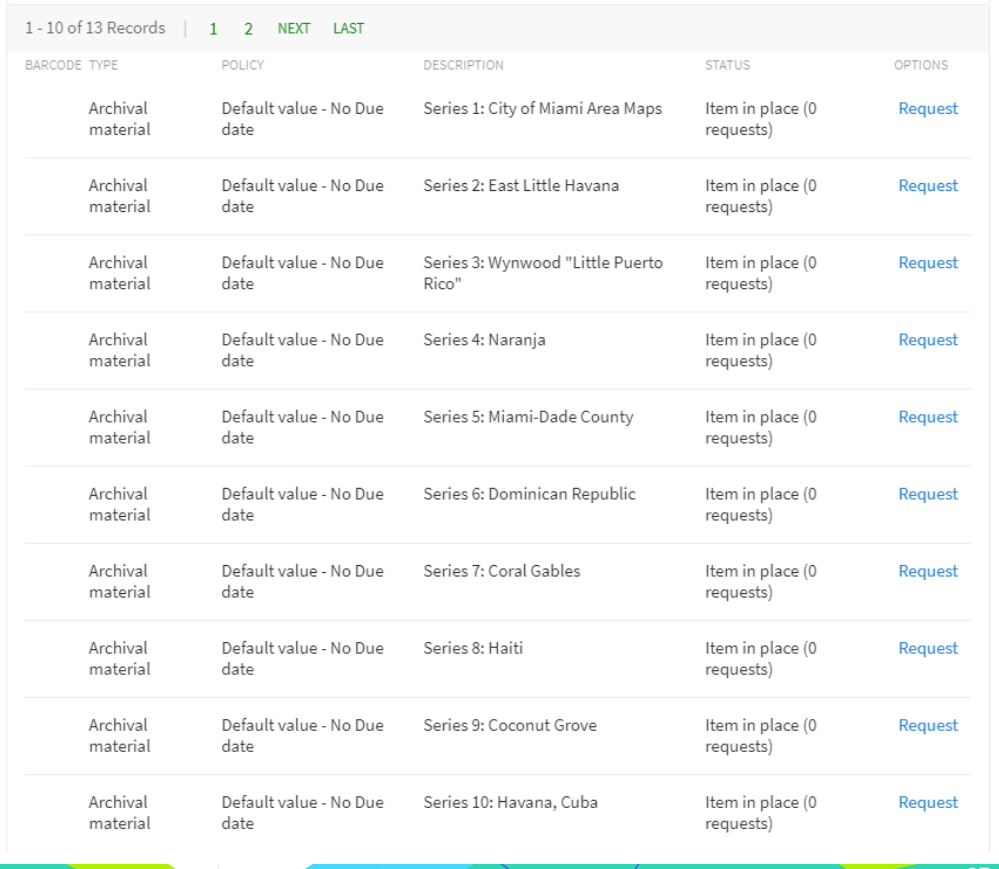
Architecture Special Collections Archives ARC4000

Hide Details

When placing a request, please include any information about specific materials in the Comments field.

1 - 10 of 13 Records | 1 2 NEXT LAST

BARCODE	TYPE	POLICY	DESCRIPTION	STATUS	OPTIONS
	Archival material	Default value - No Due date	Series 1: City of Miami Area Maps	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 2: East Little Havana	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 3: Wynwood "Little Puerto Rico"	Item in place (0 requests)	Request



1 - 10 of 13 Records | 1 2 NEXT LAST

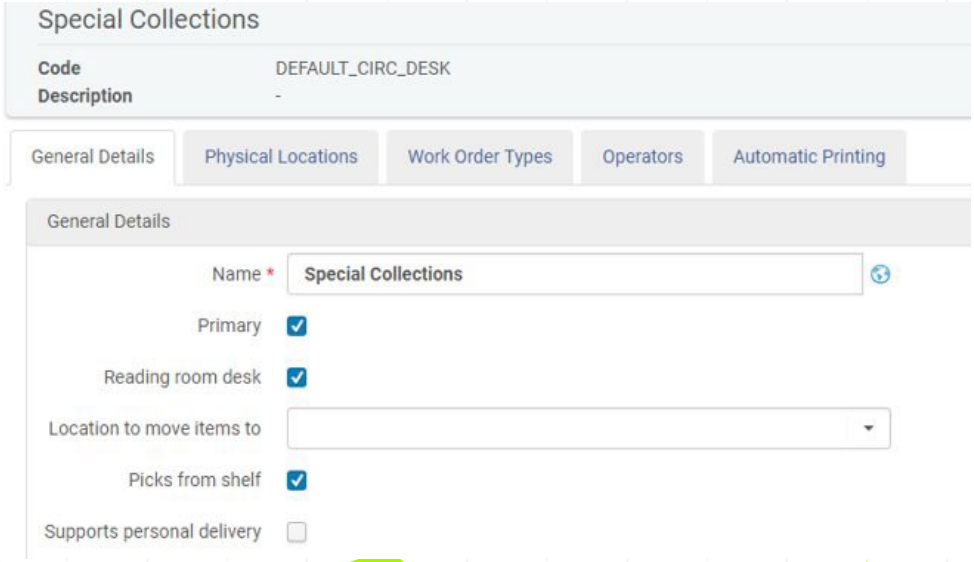
BARCODE	TYPE	POLICY	DESCRIPTION	STATUS	OPTIONS
	Archival material	Default value - No Due date	Series 1: City of Miami Area Maps	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 2: East Little Havana	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 3: Wynwood "Little Puerto Rico"	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 4: Naranja	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 5: Miami-Dade County	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 6: Dominican Republic	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 7: Coral Gables	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 8: Haiti	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 9: Coconut Grove	Item in place (0 requests)	Request
	Archival material	Default value - No Due date	Series 10: Havana, Cuba	Item in place (0 requests)	Request

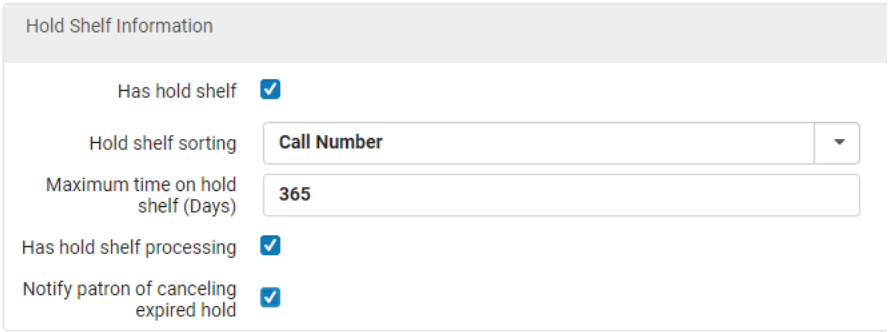
Alma Config

- Circulation desk
- Fulfillment unit rules (loan/booking)
- Relationships

Circulation desk

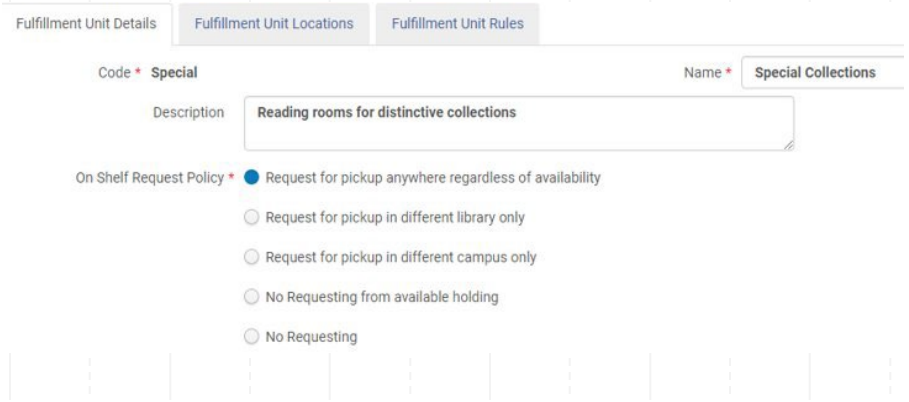
- 'Reading Room" and "Has Hold Shelf"
- Note: Reading room circ desk cannot be used for physical item requests





Fulfillment Unit Rules/Terms of Use

- Loan rules and booking rules
- Preview period important for scanning /print slips/hold shelf



Loan Rule

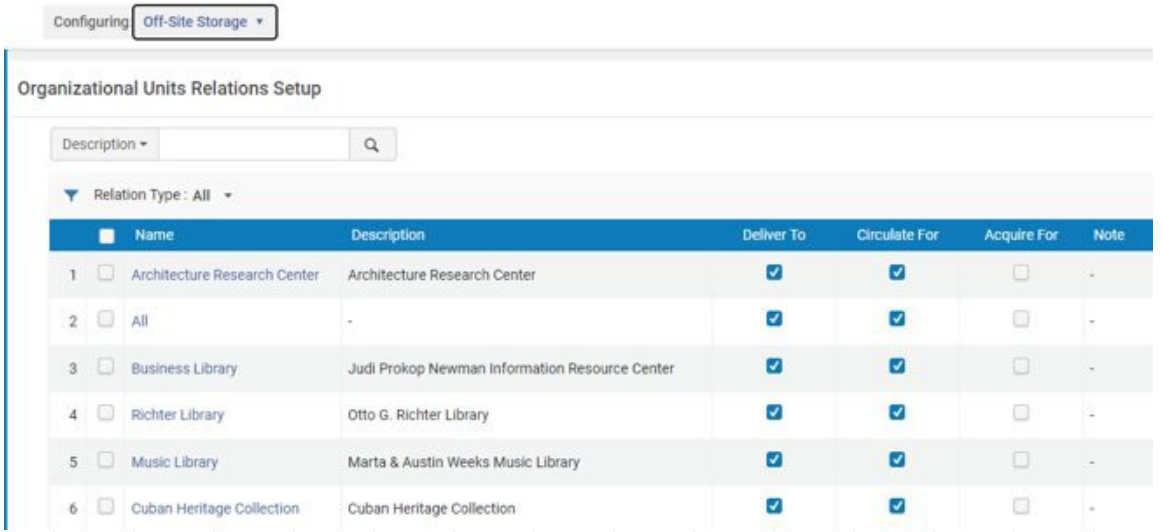
	Policy Type	Policy Name	Policy Description
1	Is Loanable	In Reading Room Only	In Reading Room Only

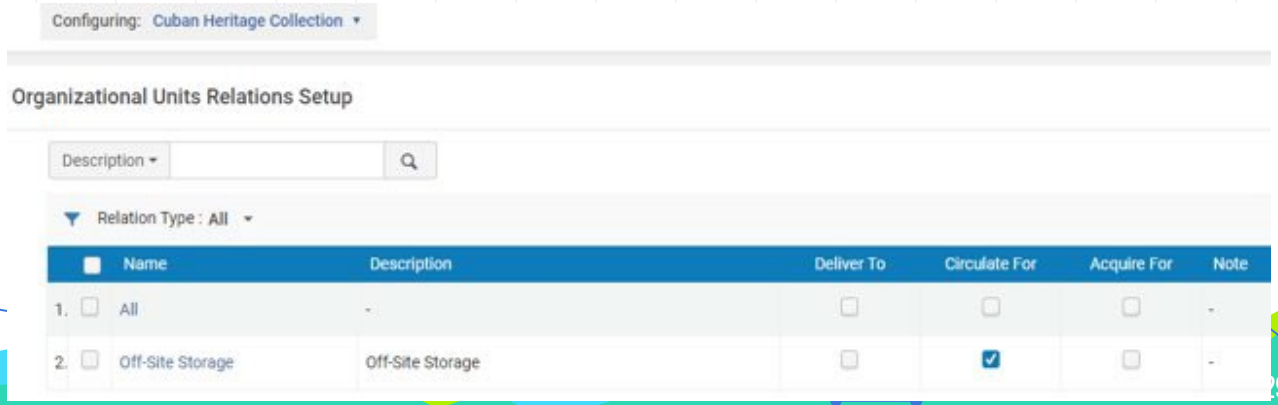
Booking Rule

	Policy Type	Policy Name	Policy Description
1	Booking release time	No Booking Release Time	Default Booking Release Time
2	Is item bookable	Item is bookable	Item is bookable

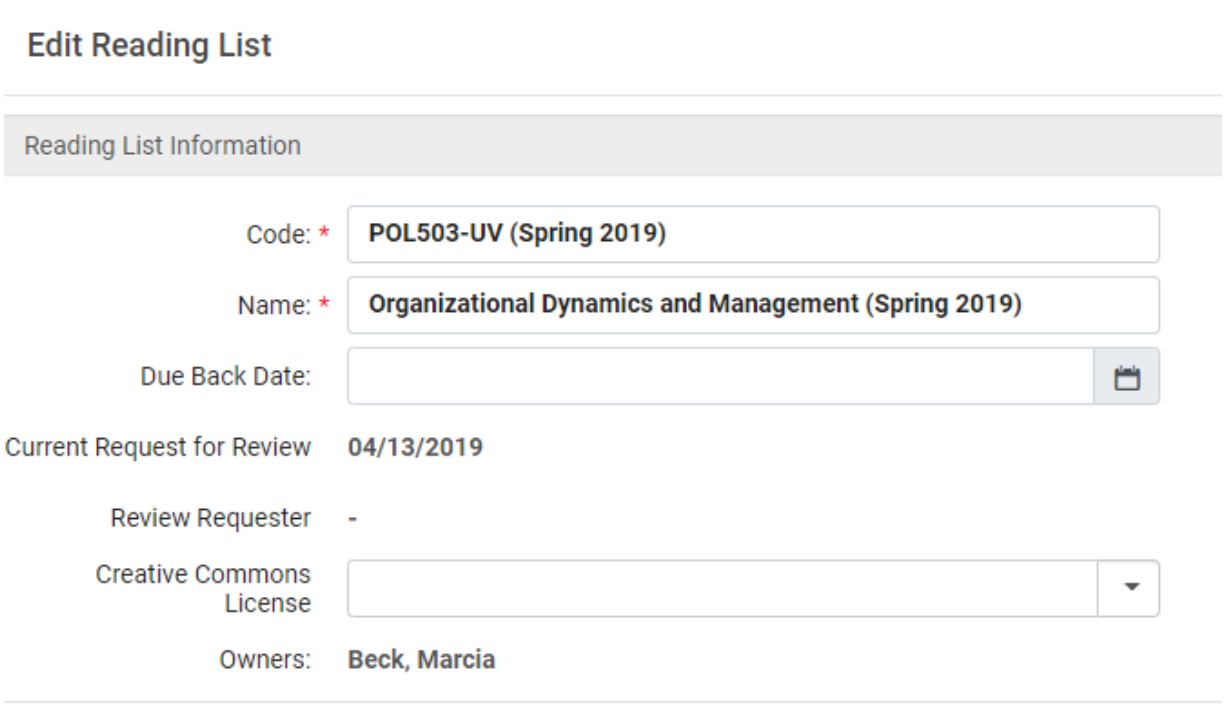
Library Relationships

- Deliver to
- Circulate for

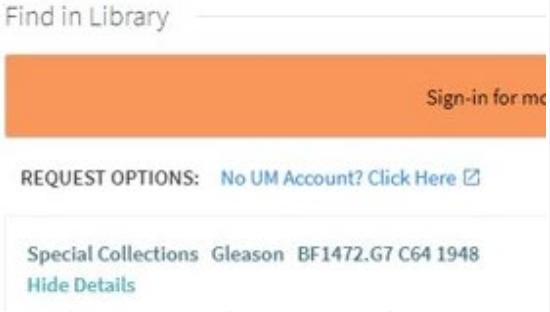


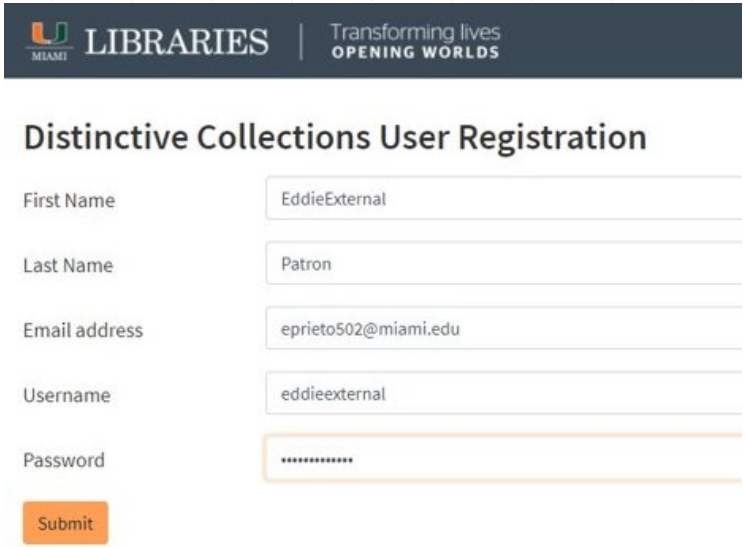


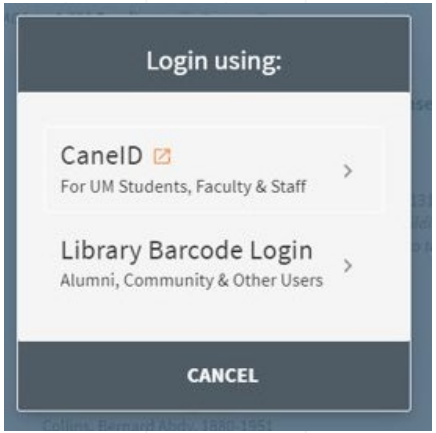
Activities


Edit Reading List
Reading List Information
Code: *
POL503-UV (Spring 2019)
Name: *
Organizational Dynamics and Management (Spring 2019)
Due Back Date:
Current Request for Review
04/13/2019
Review Requester
-
Creative Commons License
Owners:
Beck, Marcia

External Patron Registration







Booking Process

Find in Library

Details of title you requested:

Material Type:

Pickup Location: * Architecture Special Collections Reading Room

Check availability

Start Time: 08/25/2022

End Time: 08/25/2022

Comment:

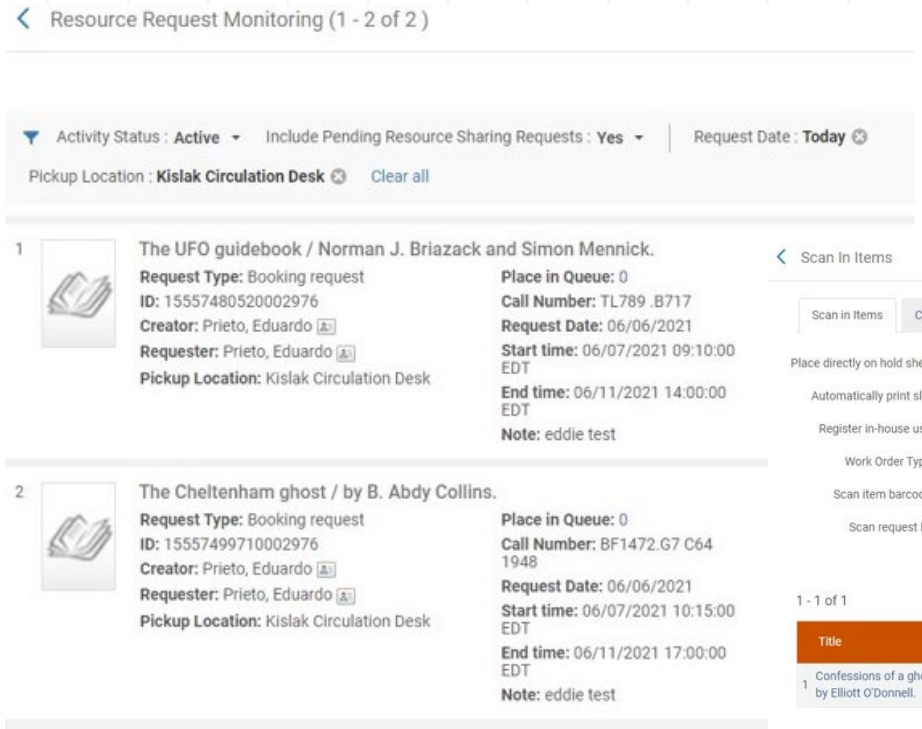
CANCEL

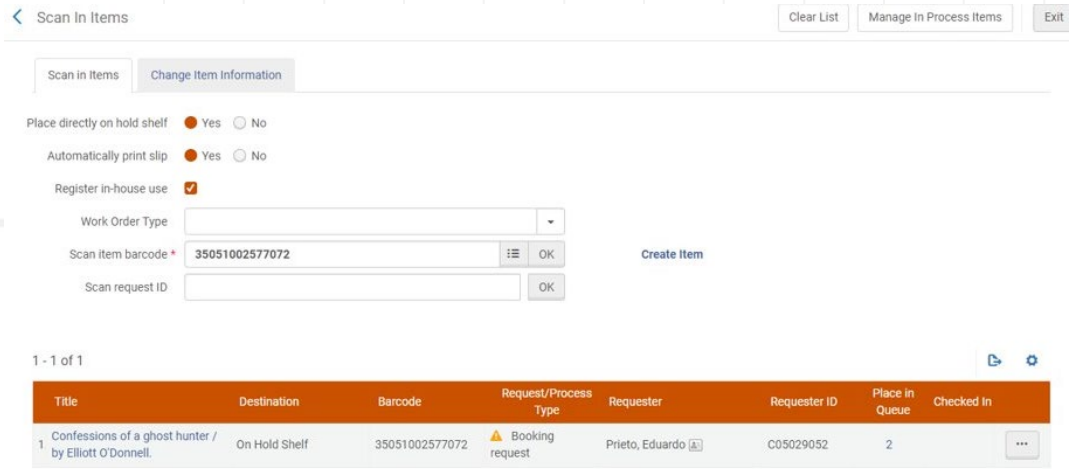
REQUEST

Start Time: 06/10/2021 11:00

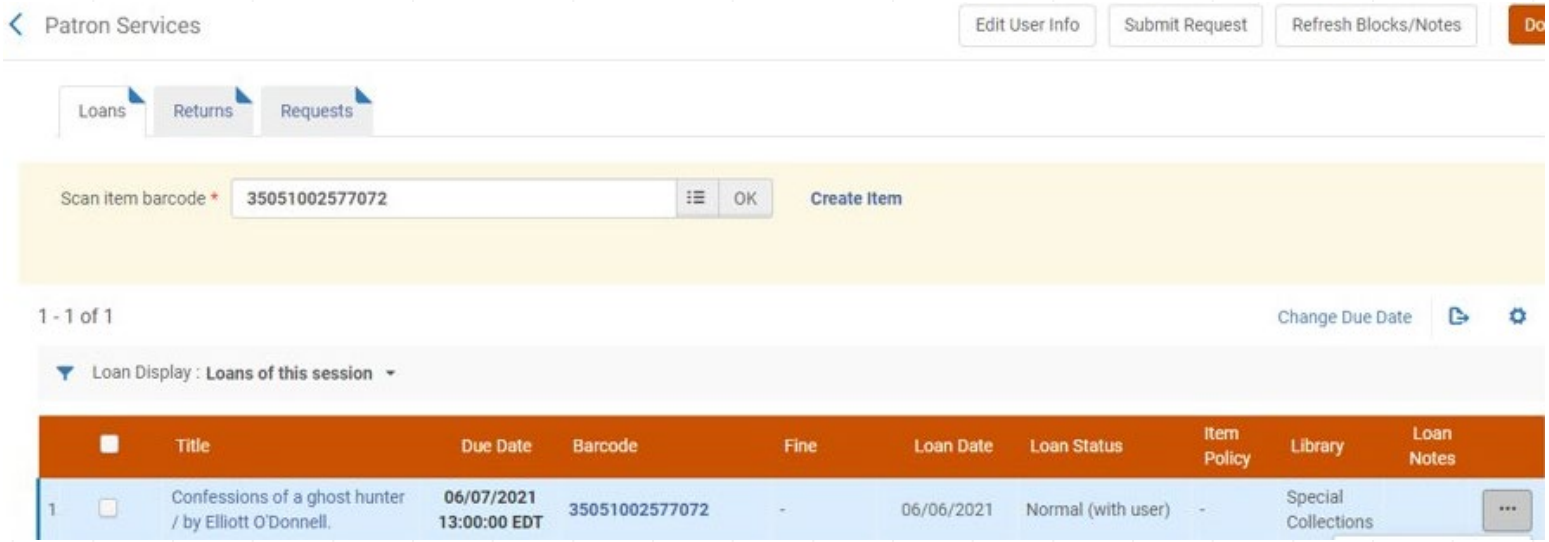
End Time: 06/10/2021 19:00

Booking process cont'd

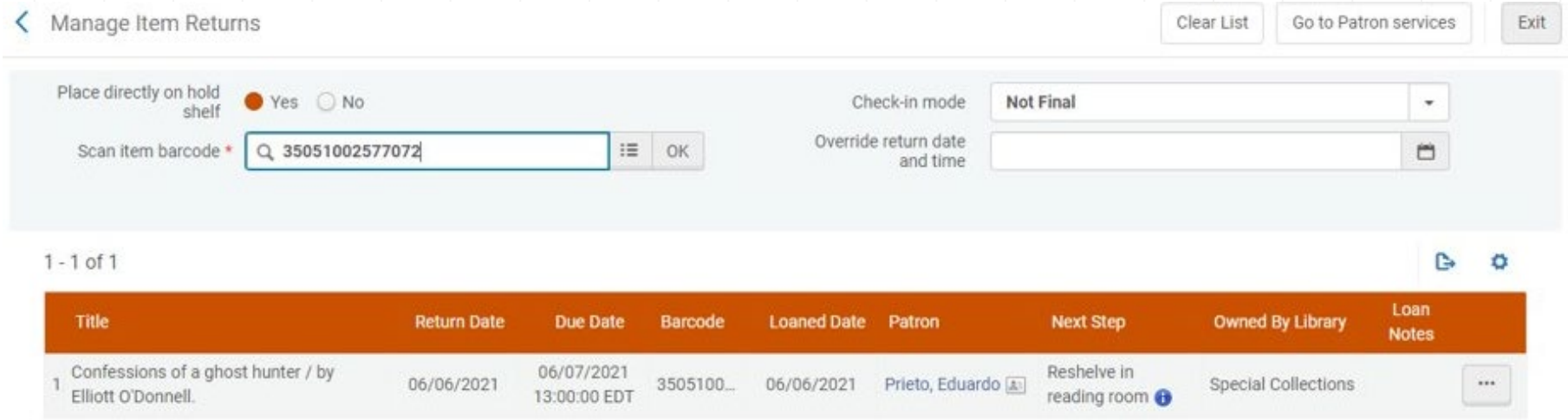


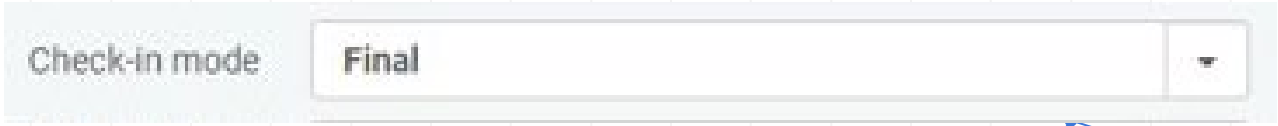


Loan process



Loan process cont'd





Aeon Historical Data

- Missing out on the historical data with Aeon
- Request Aeon database credentials
- https://support.atlas-sys.com/hc/en-us/articles/360011920753-Aeon-Access-Reports

WORKING GROUP

- Brady, Nancy
- Clough, Paul
- Gowing, Cheryl
- Fish, Elizabeth
- Prieto, Eduardo
- Samarakoon, Dhanushka
- Skokan, Beatrice
- Sylvestre, Jay
- Tsang, Martin
- Vila, Jose
- Williams, Elliot
- Villanueva, Juan

THANKS!

Any questions?

dsamarakoon@miami.edu

eprieto502@miami.edu

jvila@miami.edu