OhioLINK
Using Alma for Data Review
Acquisitions/Course Reserves

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Agenda

- **Acquisitions**
  - Vendors
  - Funds
  - Orders
- **Courses**
- **Next Steps**

Acquisitions

Check Acquisitions

Vendors (Acq > Vendors)

- You have one default account for each vendor to ensure that all POLs/Invoices migrate
- Check Vendor contact information and any notes
- POLs/Invoices link to the vendor accounts

Funds (Acq > Funds and Ledgers)

- Allocated Balance
- Encumbered Balance
- Cash Balance
- Transactions

Check Acquisitions

Purchase Order Lines

- **Acq > All PO Lines**
- Spot-check from the **vendor record** (POLs tab)
- Order lines Advanced repository search
- Acquisition method = Purchase at Vendor System/Purchase/Gift, etc.
  - Migration Form > Acquisition Method tab
    - Purchase/Purchase at Vendor System require fund/price
    - Others do not require fund/price

Check Acquisitions

Purchase Order Lines

- Order lines Advanced repository search
  - PO Line Type (Electronic/Physical/One-Time/Continuous)
    - Migration Form > Order Type tab
      - Other Service Type - not linked to inventory - may want to choose differently next time if these should link to bibs/items
    - P2E orders were 'flipped' to corresponding electronic type

Check Acquisitions

Purchase Order Lines

- Order lines Advanced repository search
  - Workflow (Sent, Closed, Recurring Renewal, In Review)

Check Acquisitions

Purchase Order Lines

Receiving Workbench

- Check your "Currently at", especially if you have multiple libraries. There are separate receiving workbenches for each library.
- Check that both one-time and continuous physical orders appear as expected
- Serials should be on the "Continuous" Tab and One-Time orders should be on the "One-Time" tab
  - Items that were on the P2E should NOT appear here since they are not physically received (they are electronically activated and handled in a different workflow)

Check ERM Data

Licenses (Acq > Licenses)

- Check that values were transferred as expected
- Check that inventory is linked to relevant licenses
  - Not all licenses will have inventory
- Confirm Licensor is correct, and links to vendor record

Vendors (Acq > Vendors)

- Under Summary tab, select Interfaces ellipsis […] > Edit
- Notes tab > confirm has been populated
  - Most collection notes have migrated with 360 collection code preceding
  - Use 360Link Activation Report provided for reference

Courses

Check Courses

- Courses should be present
- Fulfillment > Courses
- Reading Lists
  - From a course, click [...] > Reading List
  - Fulfillment > Reading Lists
- Citations
  - Citations reside in the Reading List
  - Fulfillment > Citations
  - Show items related to the citations

Next Steps

Data Checking

Initial data checking - approx. 3 weeks

- **Prioritize reviewing data before any functional testing**
- Do not change migrated data during this time
- Do an initial run-through, look for big stuff
- Report problems right away
- Identify changes to extract files and/or Migration Form and keep a list of changes

After initial data checking

- Once done with initial data checking, you are free to do any manipulations with your migrated data
- Test configurations and integrations

For additional testing guidance, see the generic PDF guides at **http://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides/Testing_Migrated_Data**

Questions?

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