



EXLIBRIS  
University of Cincinnati

# OhioLINK

## Using Alma for Data Review

### Acquisitions/Course Reserves

Barbara Andress | September 20, 2024

# 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

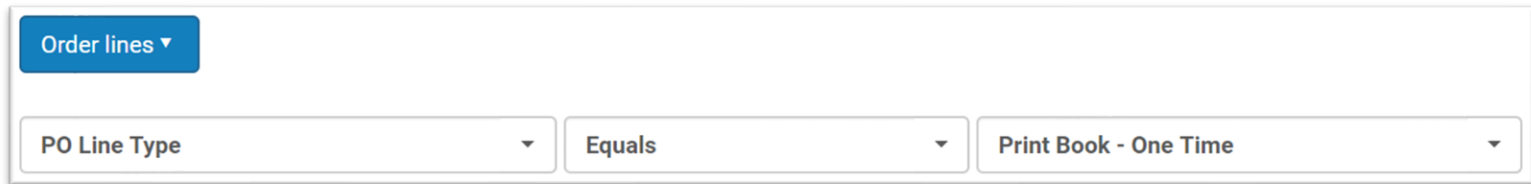


The screenshot shows a search interface with a blue button labeled "Order lines" with a downward arrow. Below it are three filter boxes: "Acquisition Method" with a dropdown arrow, "Equals" with a dropdown arrow, and "Purchase" with a dropdown arrow. To the right of these boxes are two icons: a plus sign and a document icon.

# 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



The screenshot shows a web interface with a blue button labeled "Order lines" with a downward arrow. Below it are three white dropdown menus with gray borders and downward arrows. The first dropdown menu is labeled "PO Line Type", the second is labeled "Equals", and the third is labeled "Print Book - One Time".

# Check Acquisitions

## Purchase Order Lines

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



The image shows a screenshot of a software interface with a search filter bar. At the top left, there is a blue button labeled "Order lines" with a downward arrow. Below this, there are three white filter boxes with downward arrows: "Workflow", "Equals", and "Sent".

# 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](http://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides/Testing_Migrated_Data)

# Questions?

**Barbara Andress | Senior Implementation Consultant**  
[Barbara.Andress@clarivate.com](mailto:Barbara.Andress@clarivate.com)