



OhioLINK Using Alma for Data Review

Barbara Andress | September 19, 2024

Agenda

- **Introduction**
 - Purpose of Data Review
 - Reporting Issues
 - Preparing Users to Test Data
 - Reports and Forms
- **Searching in Alma**
- **Library/Locations**
- **Inventory**
 - Physical Resources – Bibs, Holdings, Items
 - Electronic Resources – Collections, Portfolios, LR data, P2E migration
- **Patrons**
- **Next Steps**



Introduction: Purpose of Data Review

Introduction

Purpose of Data Review

Did everything migrate that should have?

- Check record counts - Do the numbers make sense? (Numbers from Migration Stats report, numbers from Alma search results)

Did things migrate as expected?

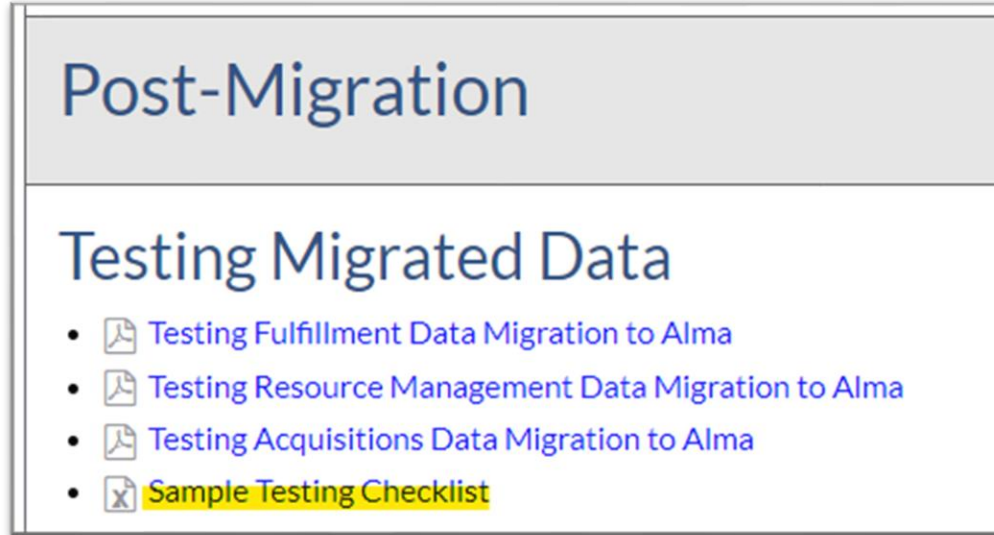
- Check the records - Is data in the right place? Are there errors?
- Verify the migration process worked as specified in the [Sierra Migration Guide](#)

Are there changes to make for cutover?

- Identify changes to the migration forms or to data. Remember, all data will be reloaded again at cutover.

Introduction

Alma Data Review Workbook



Available on the
[**Knowledge Center**](#)

- Built to be used by all ILSes; modify the spreadsheet to your institution's data
 - Remove irrelevant tabs/rows
- **Entirely for YOUR use** - to manage records for testing now and at cutover



Introduction: Reporting Issues

Introduction

Dealing with Migrated Data Issues

Did you find something that did not migrate according to your forms or as expected in your data?

- **Check Migration Statistics Report** – was it a known issue?
- **Recommendation:** look at the related Sierra data and migration forms to see if you can identify the root cause; provide corresponding record identifiers in case we need to investigate in source data.
- **Remember:** Data was extracted in April. Changes made in Sierra since then will not be reflected in your Alma environment.

Report ALL issues you find in Basecamp, in YOUR institution's Test Load Delivery folder.

- ExL team will determine if a Salesforce case will need to be opened (1 case per data issue).

Introduction

Dealing with Migrated Data Issues

When reporting issues in Basecamp, please provide as much of the following information as possible:

- 1. Problem:** short description of the problem (what issue did you discover?)
- 2. What:** Please include examples, including at least 2-3 MMS IDs / Item Barcodes / Patron identifiers / etc.; and how widespread you think the problem may be
- 3. Scenario:** Step-by-step scenario of how you discovered the issue ("1. Went to X, 2. Clicked on Y, etc.").
 - Describe how the problem can be reproduced
 - Include as much detail as possible - screenshots or video capture of how the issue was discovered can be invaluable
 - Which user was logged in and discovered the issue (so we can confirm if there are role issues)
- 4. Expected behavior:** What you expected vs. what you found
 - ("I expected X, but Alma has Y").
- 5. Where:** Which production environment the issue was discovered



Introduction: Preparing Users to Test Data

Staff User Setup for Data Review

Authentication has not yet been set up:

- "Toggle Account Type" to "Internal"
- Add a password to the user account
- Login is primary identifier (or other identifiers can be used as well)
- Toggle to "External" after external authentication is set up

The screenshot shows the 'User Details' page for a user named Alma Administrator. The page is divided into several sections:

- General Information:** Includes tabs for Contact Information, Identifiers, Notes, Blocks, Fines/Fees, Demerits, Statistics, Attachments, and Proxy. A 'Toggle Account Type' button is highlighted in the top right corner.
- User Information:** Contains fields for First name (Alma), Last name (Administrator), Preferred middle name, Primary identifier (admin), Job description, User group (Staff Patron), Website URL, Status (Active), Birth date (07/03/2011), Purge date, Purchase request library, and Send message (General mail). A red box highlights the Primary identifier field.
- User Management Information:** Contains fields for Password, Verify password, Force password, Single sign-on login, and Disable all login restrictions. A red box highlights the Password and Verify password fields.
- User Roles:** Shows 1 - 20 of 36 roles. Buttons for Add Role, Add from Profiles, and Remove Selected are visible.

Staff User Roles

- Add Roles so staff can perform relevant testing
 - See "Descriptions and Accessible Components" at [User Management](#) for detailed information about what each role has access to.
 - Some roles are institution level only, and some are set at library or institution level
 - Some roles MUST have a Service Unit (e.g a circ desk or a department)

Staff User Roles

Suggested roles to test migrated data:

- Circulation Desk Operator (Service Unit = Circulation Desk)
- Requests Operator (Service Unit = Circulation Desk)
- Receiving Operator (Service Unit = Acq Dept)
- Cataloger
- Design Analytics
- Electronic Inventory Operator
- Fund-Ledger Viewer
- License Manager
- Patron
- Physical Inventory Operator
- Purchasing Operator
- Repository Manager
- Usage Data Operator
- User Manager
- Vendor Manager

Staff Roles and Service Units

Library Level Roles - *require a service unit*

- Circulation Desk Manager/Operator/Operator Limited - *Circulation Desk*
- Requests Operator - *Circulation Desk*
- Receiving Operator/Operator Limited - *Acquisitions Department*
- Work Order Operator - *Work Order Department*

Staff Roles and Service Units

Manage Users

Role information

Role name: Circulation Desk Operator

Scope: UC Main Library

Status: Active

Expiry Date:

Role parameters

+ Add Circulation Desk

Circulation desk *
Default Circulation Desk

Add circulation desk

Specific library scope,
with a specific service
unit

Select relevant location at sign-in:

None

Look-up or select

None of these

Main Library - Circulation

Main Library - Technical Services

Resource Sharing Library - Resource Sharing Desk



Introduction: Reports and Forms

Preparing to Test Data - Reports and Forms

The following forms are helpful when checking data in Alma:

- Migration Stats Report (available in institution's Test Load Delivery folder)
 - Number of records migrated + electronic resources activated (linked to Community Zone)
 - Rejected inventory / reasons why
- Link Resolver Reports (available in institution's Test Load Delivery folder)
 - Identifies what resources were successfully migrated and what was not
- Migration Forms (available in institution's Migration Forms folder)
 - Migration form
 - Field Mapping Form
 - P2E file
 - Eresource Activation Form/360 reports

Migration Stats Report – Source Input Counts

- Lists the number of records in each record type in the original data extracts provided by Innovative
- P2E records = total count of all rows, including both portfolios and dbs
- Serial records = Sierra checkins

Source Entity	Count
Bib records	8060167
Marc holdings	138906
Serial records	139022
Items / Embedded items	11794379
Issue Items	
POs	353126
PO Lines	
Invoices	
Invoice Lines	
Funds	657
Vendors	1984
Vendor Interfaces	
Licenses	
Courses	1008
Patrons	433803
Fine and Fees	1493
Loans	50443
Requests	268
P2E records	3890863

Migration Stats Report - All tabs

Counts	#
Number of Bibs	577462
Number of Hols	562756
Number of Items	668468
Number of Portfolios from Link Resolver	0
Number of Portfolios from ILS	18530
Number of Packages/DBs from Link Resolver	0
Number of Packages/DBs from ILS	556

Code/ID	Reason for reject
b25399846 i20354678	Item ID i20354678 was rejected because it is a duplicate item.
b13287412 i2035468x	Item ID i2035468x was rejected because it is a duplicate item.
b54519548 i36362955	Item ID i36362955 was rejected because it was associated with Bib ID b54519548 which was not in the supplied mrc files
b68214315 i37392888	Item ID i37392888 was rejected because it was associated with Bib ID b68214315 which was not in the supplied mrc files
b25284599 c10021085	Checkin ID c10021085 was rejected because it was associated with Bib ID b25284599 which was not in the supplied mrc files
b25547768 c10021875	Checkin ID c10021875 was rejected because it was associated with Bib ID b25547768 which was not in the supplied mrc files
b2558702x c10022168	Checkin ID c10022168 was rejected because it was associated with Bib ID b2558702x which was not in the supplied mrc files
b2570025x c10022508	Checkin ID c10022508 was rejected because it was associated with Bib ID b2570025x which was not in the supplied mrc files
b25845974 c10023057	Checkin ID c10023057 was rejected because it was associated with Bib ID b25845974 which was not in the supplied mrc files
b25000585 c10013750	Checkin ID c10013750 was rejected because it was associated with Bib ID b25000585 which was not in the supplied mrc files

Overview **bib_inventory** vendor fund fund_tx p_order patron loan request p2e

Searches on the upcoming slides can be done to compare the number of records in Alma to these numbers.

Rejects for each record type will be listed on after the records "Counts." Use record IDs to review original records for issues.

Migration Stats Report – Inventory tabs

- **bib_inventory tab**

- ILS = P2E
- Link Resolver = 360 data files or eresource activation form
- Rejects on this tab can be from bibs, items, or holdings

Counts	#	
Number of Bibs	3296797	
Number of Hols	158490	
Number of Items	190567	
Number of Portfolios from Link Resolver	2889080	
Number of Portfolios from ILS	369644	
Number of Packages/DBs from Link Resolver	102	
Number of Packages/DBs from ILS	0	

- **p2e tab**

- Important to look for any rejected records on this tab

Counts	#	
New EResources from BIBs	338114	
New EResources from HOLDINGS	18	
New EResources from ITEMS	31512	
Total new Portfolios	369644	
Total new Electronic Collections	0	
Total new DBs	0	

Migration Stats Report – Other tabs

- vendor
 - fund
 - fund_tx (created from active orders)
 - p_order (all order records)
 - patron
 - loan
 - request
 - course
-
- Review any rejects listed on each tab
 - If the reject text is unclear, please ask on Basecamp for more explanation regarding specific error messages

Link Resolver Activation Events Report

- This report lists all events during the loading of the eresource activation form.
- Most rows are informational, not useful.
- It is helpful to filter the **Severity** column, to remove the "Information" lines. Warning lines will explain why a row may have been skipped.

Event Description	Event Date	Severity
TITLES: Skipping portfolio in line #3: wrong value 1/1/98 of column FROM_YEAR [Title: Evidence-Based Nursing Package: BMJ Journals] - Job ID: 208258430008562	18/01/2024 04:15:07	Warning
TITLES: Skipping portfolio in line #2: wrong value 1/7/98 of column FROM_YEAR [Title: JAMA: Journal of the American Medical Association Package: American Medical Association Journals] - Job ID: 208258430008562	18/01/2024 04:15:05	Warning
Parse warning SEQ = N/A - N/A: Sheet: SELECTIVE_PKG Error in line #19781 PACKAGE_ID, SERVICE_ID, PACKAGE_NAME and SERVICE_TYPE must be defined. The package is skipped. - Import Job = 208258430008562	18/01/2024 03:57:31	Warning

- For example - the first two rows explain that there were issues with the values on the titles tab, and the third is a selective package that was skipped (STANDALONE, the last row of that tab, which is an optional package)

360 to Alma Activation Report

- Four tabs in this report:
 - **Statistics** - high level of numbers in your 360 migration.
 - **360 DB to Alma E-collection** - your original 360 databases and which Alma collection was matched (if a match was found).
 - **Selective titles without ID** - when a selective collection is activated, information on individual titles is needed; if there is no ISSN or ISBN for a record, it will appear on this tab.
 - **Titles for unmatched collection** - all titles from your 360 databases that did not have a matched collection in Alma

https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/360_and_Intota_to_Alma_Migration_Guide

Proquest Enrichment Report

- This report defines e-resources that are purchased through Proquest that were not activated with other LR sources
- Review to confirm these are accurate to your subscriptions
- **Important:** If anything on this list seems inaccurate, contact your Proquest Account Manager to see what Proquest has listed as your subscriptions

Electronic Collection Name	Service Type	Electronic Collection Type	Number of portfolios
Coronavirus Research Database		Database	
Academic Video Online: Premium - Outside North America	Full Text	Aggregator package	73196
Academic Video Online		Database	
ProQuest Statistical Abstract of the United States	Full Text	Aggregator package	1
Academic Video Online: Premium - Canada	Full Text	Aggregator package	76611
Academic Video Online: Premium - United States	Full Text	Aggregator package	77669
Academic Video Online: Premium - Australia	Full Text	Aggregator package	72631
Worldwide Political Science Abstracts		Database	
PTSDpubs		Database	
Academic Video Online: Premium - United Kingdom	Full Text	Aggregator package	73207
ProQuest Dissertations & Theses Global		Aggregator package	
ProQuest Historical Newspapers: The New York Times	Full Text	Aggregator package	3
Academic Video Online: Premium - Japan	Full Text	Aggregator package	72987
Science Database	Full Text	Aggregator package	1436



Searching in Alma

Searching in Alma

Wonder how things are indexed? What fields are searchable?

MARC 21 Search Indexes

- See "MARC 21 Bibliographic Tag to Search Index Mapping" table
- See "MARC 21 Holding Tag to Search Index Mapping" table

Search Indexes

Sections on searchable fields for:

- Electronic collections
- Electronic portfolios
- Holdings
- Physical items

Searching in Alma

Tools to use:

- Facets on left of the display
- Change the "Find" (see difference between physical and electronic and between titles and items/portfolios)
- Remember there are no stop words (a, an, the, etc. are all valid terms)
- Record count in upper right - do the numbers look right?
- "More Info" link: number of circs / links to requests / links to orders

[Explanation](#) of Facets, Icons, Search Criteria, etc.

Searching in Alma

Icon Indicators:



Suppressed



Institution



Network Zone



Community Zone



Grayed out icons
indicate inactive
resources

[Glossary of Alma Terms](#)

Searching in Alma

Ex Libris project team's recommended searches for data review

- **Note: Perform these recommended searches again to review cutover data.**
- You know your data best! These searches will likely prompt additional queries you want to run - write those down so you know exactly how you'll check your cutover data.

Save Queries

- Used to create logical sets
- Set keeps the result of your search for later use
- Can export to Excel with "Tools" to create report for clean-up
- **Note:** large results - break down into smaller sets before exporting
- **Note: Sets are NOT retained at cutover so these will need to be recreated as needed.**

Network Zone (NZ)

How records were loaded

- NZ created from institution's bib records, loaded in order as provided by OhioLINK Central Office
- OhioLINK Shared Catalog bib records and Eresource Activation Form

How records were linked

- Institution-level bibs from each IZ linked to NZ bibs
 - **Your** version of the bib was overwritten by the NZ version, except LOCAL fields
- Matching is based on a common identifier (OCLC number)
- Unlinked IZ records can be linked to NZ records, and linked IZ records may be unlinked or re-linked to different NZ bibs using Alma tools, post-migration as needed



Libraries and Locations

Libraries and Locations

Verify Library and Location information is correct for each library

Review via Configuration > Configuring [Library] > Fulfillment > Locations

The screenshot shows the Alma Production interface. On the left is a blue navigation sidebar with icons and labels for Alma Production, Resources, Discovery, Fulfillment, and User Management. The main content area is titled 'Configuring: Case Western Reserve University'. A search bar is visible. A dropdown menu is open, listing various libraries, with 'Kelvin Smith Library' highlighted in yellow. A second window is overlaid on top, titled 'Configuring: Kelvin Smith Library'. This window shows the 'Physical Locations List' with a search bar and filters for 'Location Type: All' and 'Attached Fulfillment Unit: All'. Below the filters is a table with the following data:

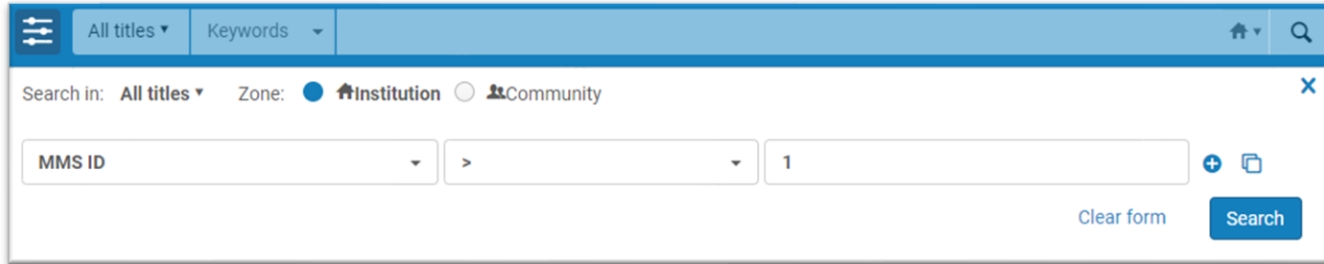
	Code	Name	Type	Fulfillment Unit
1	tsta	Astronomy Charts	Open	General
2	tper	Astronomy Periodicals	Open	General
3	tref	Astronomy Reference	Open	General
4	tres	Astronomy Reserve	Open	Reserves



Inventory

Check Resources - Bibs

- Total count (ILS + link resolver bib records) 

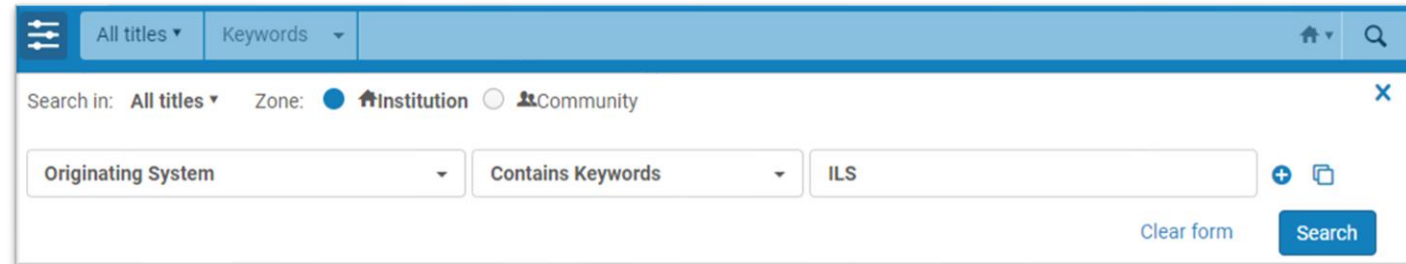


The screenshot shows a search interface with a blue header bar containing 'All titles' and 'Keywords' dropdowns, a home icon, and a search icon. Below the header, the search criteria are 'All titles' and 'Zone: Institution' (selected). The search input fields are 'MMS ID', '>', and '1'. There are '+', 'Copy', 'Clear form', and 'Search' buttons.

Checks with this symbol can also be done in the NZ



- Bibs from ILS 



The screenshot shows a search interface with a blue header bar containing 'All titles' and 'Keywords' dropdowns, a home icon, and a search icon. Below the header, the search criteria are 'All titles' and 'Zone: Institution' (selected). The search input fields are 'Originating System', 'Contains Keywords', and 'ILS'. There are '+', 'Copy', 'Clear form', and 'Search' buttons.

Check Resources - Bibs

Check Facets

- Resource Type Facet

Resource Type is calculated based on the LDR and 008 values

- Material Type Facet

This is the bib-level material type - calculated from fixed fields

For more information, see [Search Indexes](#)

Check Resources - Bibs

Understanding Bib Brief Results

Material Type
{Resource Type}

Additional
information related
to this bib

The dolphin in the mirror : exploring dolphin minds and saving dolphin lives / Diana Reiss.

Book {Book - Physical} text; unmediated; volume By Reiss, Diana. (Boston : Mariner Books 2012.)

Language: English
ISBN: 9780547844619 and others

Subject: Dolphins--Conservation. Dolphins--Psychology. Delfiner. and others

Edition: 1st Mariner books ed.

Record number: (CMJ)772100980-01caccl_modesto

Update Date: -

▼ **Physical (1)** Electronic Digital Other details

1 Holdings | 1 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability
Gilroy	2ND	QL737 .C432 R457 2012	-	● from:2012 until:2012

The dolphin in the mirror : exploring dolphin minds and saving dolphin lives / Diana Reiss.

Book {Book - Physical} text; unmediated; volume By Reiss, Diana. (Boston : Mariner Books 2012.)

Subject: Dolphins--Conservation. Dolphins--Psychology. Delfiner. and others

Edition: 1st Mariner books ed.

Language: English
ISBN: 9780547844619 and others

Record number: (CMJ)772100980-01caccl_modesto

Update Date: -

▼ **Physical (1)** Electronic Digital **Other details**

Related Records 0

Publishing information for physical inventory **215617760005313**

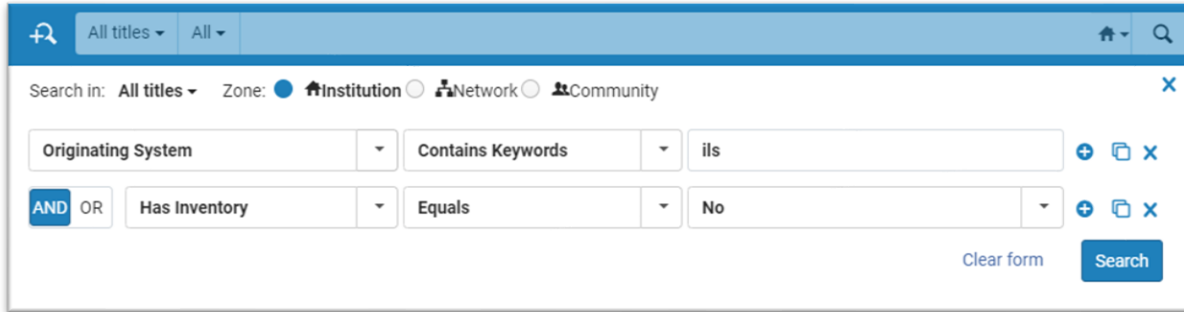
Completed requests 0
Licenses 0
Courses 0
Reminders 0

Holdings, physical or electronic

Original bib number from Sierra

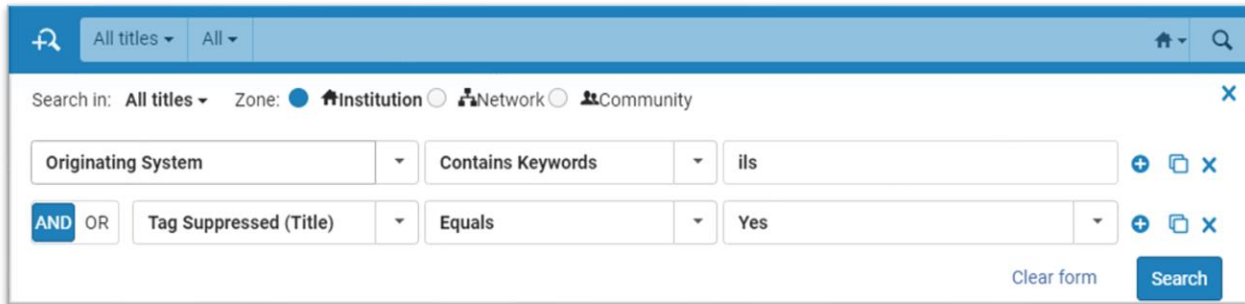
Check Resources - Bibs

- Standalone bibs



A screenshot of the ExLibris search interface. The top navigation bar shows "All titles" and "All" dropdowns, along with home and search icons. Below this, the search scope is set to "All titles" and the zone is "Institution". The search criteria are: "Originating System" (dropdown), "Contains Keywords" (dropdown) with the value "ils", and "Has Inventory" (dropdown) with the value "No". The criteria are connected by "AND" and "OR" operators. There are buttons for adding (+), copying, and deleting (X) criteria. At the bottom right, there are "Clear form" and "Search" buttons.

- Suppressed bibs 



A screenshot of the ExLibris search interface. The top navigation bar shows "All titles" and "All" dropdowns, along with home and search icons. Below this, the search scope is set to "All titles" and the zone is "Institution". The search criteria are: "Originating System" (dropdown), "Contains Keywords" (dropdown) with the value "ils", and "Tag Suppressed (Title)" (dropdown) with the value "Yes". The criteria are connected by "AND" and "OR" operators. There are buttons for adding (+), copying, and deleting (X) criteria. At the bottom right, there are "Clear form" and "Search" buttons.

Check Resources - Bibs - Suppressed bibs

- **Check Suppressed bibs:**

Suppressed records can migrate to NZ as master bib records causing issues for institutions that have their bib records linked to the shared NZ master bibs. FYI see [Orbis Cascade's](#) and [Calstate's](#) policies on this.

The screenshot displays a search interface with the following elements:

- Zone:** Institution (selected), Network, Community.
- Search Criteria:**
 - Row 1: Tag Suppressed (Title) [dropdown] Equals [dropdown] Yes [input]
 - Row 2: AND [button] OR [button] Is linked [dropdown] Equals [dropdown] Yes [input]
- Buttons:** Clear form, Search.
- Results Summary:** All Titles (1 - 20 of 1,734) where (Tag Suppressed (Title) equals "Yes" AND Is linked equals "Yes") Save Query
- Filters:** Institution, Network, Community.
- Sort:** Sort by: Rank, Secondary Sort by: Rank.
- Actions:** Expand, Edit Record, Holdings, ...
- Result 1:**
 - Title:** My daughter Susan Smith / Linda H. Russell with Shirley Stephens.
 - Book (Book - Physical)** By Russell, Linda H. (Brentwood, TN : Authors Book Nook c2000.)
 - Subject:** Smith, Susan--(Susan Vaughan) Women murderers--South Carolina--Union. Murder--South Carolina--Union, and others
 - Language:** English
 - ISBN:** 0970107617 (pbk)
 - Record number:** (sccom)98235-01pascal
 - Update Date:** -
- Media Type:** Physical (1), Electronic, Digital, Other details.

Check Resources - Bibs

- Bibs that are NOT linked to the NZ or CZ



Search in: All titles ▾ Zone: Institution Network Community X

Is linked ▾ Equals ▾ No ▾ + 📄

Clear form Search

- Bibs that are linked to either the NZ or CZ



Search in: Physical titles ▾ All ▾ Zone: Institution Network Community X

Title: Linked Institution ▾ Equals ▾ Look-up or select ▾ + 📄

Community
Network

Search

Check Resources - Bibs

Bibs that are linked to NZ

Search in: All titles ▾ Zone: Institution Network Community

Linked Institution ▾ Equals ▾ Network ▾

AND OR Originating System ▾ Contains Keywords ▾ ILS

Clear form Search

Click to go to NZ record

Physical Titles (1 - 20 of 16,099) where (MMS ID > "1" AND Is linked equals "Yes")

Institution Network Community

Sort by: Rank ▾ Secondary Sort by: Rank ▾

1 [The body book : a fantastic voyage to the world within / by David Bodanis.](#)
Book By Bodanis, David. (Boston : Little Brown ©1984.)
Subject: Human biology. Human anatomy. Physiology. and others
Edition: 1st ed.

Institution Network Community

Sort by: Rank ▾ Secondary Sort by: Rank ▾

1 [The body book : a fantastic voyage to the world within / by David Bodanis.](#)
Book (Book - Physical) text; unmediated; volume By Bodanis, David. (Boston : Little Brown ©1984.) ISBN: 0316100714 and others
Record number: 10753145-01caccL_scccd
Subject: Human biology. Human anatomy. Physiology. and others
Edition: 1st ed.



Electronic Digital **Held by (6)** Other details

Butte College Santa Monica College	Crafton Hills College Santa Rosa Junior College	Long Beach City College State Center Community College District
---------------------------------------	--	--

Check Resources - Bibs - Local fields

Check local fields

- Use simple keyword search to look for text of local fields that are indexed
- Local fields can be set up as **local search indexes**, or if you indicate them on your Configuration Form > Resource Management tab > Local 9xx fields

	938	__ a YBP Library Services b YANK n 444963
	994	__ a 92 b KGT
	994	__ a C0 b GAVCL
	994	__ a Gavilan_College



Inventory: Physical Resources

Check Physical Resources - Holdings

- Total number of holding records
 - Created from item data, or from MARC holdings or checkins, when they exist



The screenshot shows the Alma search interface. At the top, there is a blue header with a magnifying glass icon, a dropdown menu set to "Physical holdings", another dropdown menu set to "Keywords", and a search button. Below the header, the search area is titled "Search in: Physical holdings" with a close button (X). The search criteria are displayed as "Title: MMS ID" in a dropdown menu, followed by a greater-than sign (>) in a dropdown menu, and the value "1" in a text input field.

When searching in Alma, remember:

Physical holdings searches = Returns holdings records, each holding listed individually.

- Some holdings will relate to the same bib record.

Physical titles searches = Returns bib records that have physical holdings.

- Some bib records will have multiple holdings in the same or different locations.

Check Physical Resources - Holdings

A MARC holding is created in Alma for each related checkin record:

- "b15228915","c14000040","v.34- 2013-","","bhper".....
- "b15228915","c14122339","v.8-33 1987-2012","","bxbh "...0","

Items with same "b" number and location will be attached to these holdings:

- "b15228915","i24000413","","box v.8 (1987) inc.,""1","35052012369906","bxbh".....

Discover

Journal (Journal - Physical) text; unmediated; volume (Los Angeles, etc.) : Time, inc 1980

Language: English

ISSN: 0274-7529

Subject: Science-Periodicals. Periodicals.

Record number: (MeB)b15228915-01cbb_bowc

Creation Date: 01/30/2023 20:53:36 EST

Modification Date: -

Physical (2)

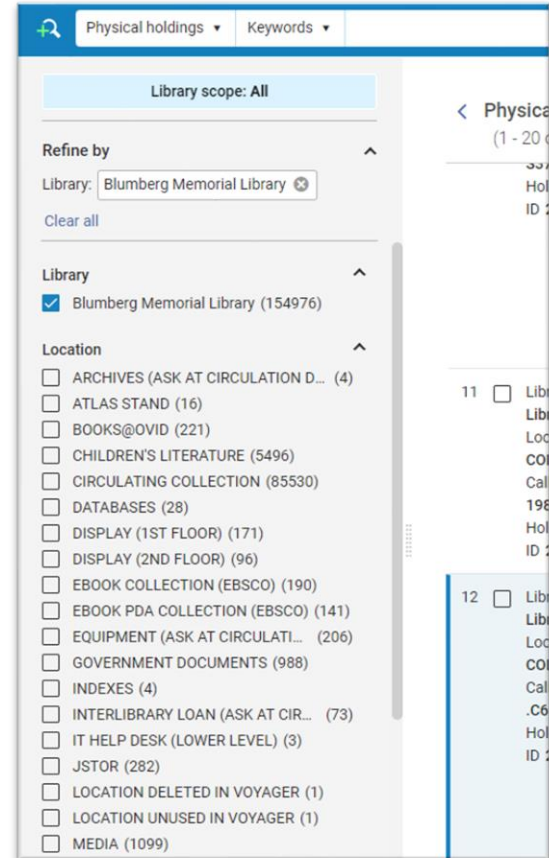
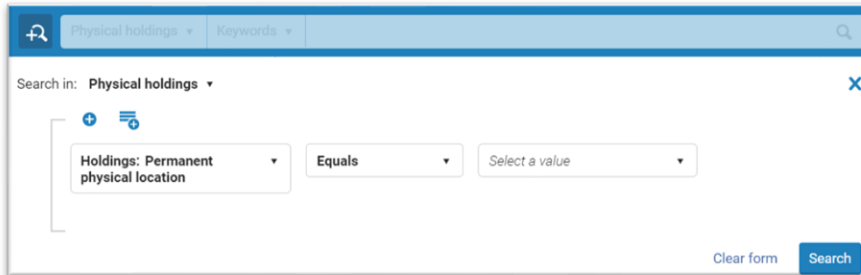
2 Holdings | 163 of 163 items are available

Library	Location	Call Number	Accession Number
MAIN	bhper	-	-
MAIN	bxbh	-	-

	Barcode	Library	Location
1	35052012369906	Hawthorn... Longfellow Library	Annex Main-bxbh
2	35052012369898	Hawthorn... Longfellow Library	Annex Main-bxbh

Check Physical Resources - Holdings

- Bibs that were left off the P2E
 - Using the previous search, look for and select relevant Locations from Facets
 - Can also search for specific location
 - If a location does not appear in the Physical holdings facet, no holdings or items exist in that location



Check Physical Resources - Holdings

- Suppressed holdings

Physical holdings ▾ Keywords ▾

Search in: Physical holdings ▾

Holdings: Tag Suppressed (Holdings) ▾ Equals ▾ Yes ▾

This screenshot shows a search interface for 'Physical holdings'. The search criteria are set to 'Physical holdings'. A filter is applied: 'Holdings: Tag Suppressed (Holdings)' is set to 'Yes' using the 'Equals' operator. The interface includes a search bar, a search button, and a close button (X).

- Empty holdings

Physical holdings ▾ Keywords ▾

Search in: Physical holdings ▾

Holdings: Has items ▾ Equals ▾ No ▾

This screenshot shows the same search interface for 'Physical holdings'. The search criteria are set to 'Physical holdings'. A filter is applied: 'Holdings: Has items' is set to 'No' using the 'Equals' operator. The interface includes a search bar, a search button, and a close button (X).

Check Physical Resources - Holdings

- Empty call numbers

Physical holdings | Keywords

Search in: Physical holdings

Holdings: Permanent call number <= 0

And Holdings: Permanent call number type Equals Select a value

Q Search...

- Dewey Decimal classification
- Library of Congress classification
- National Library of Medicine classification
- No information provided
- Other scheme
- Shelved separately
- Shelving control number
- Source specified in subfield \$2

Choose call number type you use

Two fields are required when searching for a specific call number

- Permanent call number
- Permanent call number type
 - Options includes LOC, SUDOC, Dewey, NLM, etc.

Check Physical Resources – Items

- Check total item record count:

The screenshot shows a search interface with the following elements:

- Search in: Physical items
- Zone: Institution (selected), Community
- Title: MMS ID
- Operator: >
- Value: 1
- Buttons: Clear form, Search

- Check items without a valid permanent location:

The screenshot shows a search interface with the following elements:

- Search in: Physical items
- Zone: Institution (selected), Community
- Holdings: Permanent physical locator
- Operator: Is Empty
- Buttons: Clear form, Search

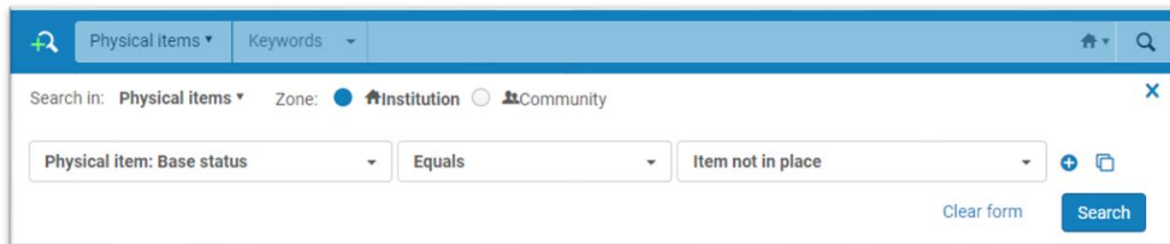
The screenshot shows a search interface with the following elements:

- Search in: Physical items
- Zone: Institution (selected), Community
- Permanent physical location
- Operator: Equals
- Value: Main Library (Eccles) : UNASSIGNED (UNASSIGNED)
- Buttons: Clear form, Search

Check Physical Resources - Items

- Check Items "Not in place"

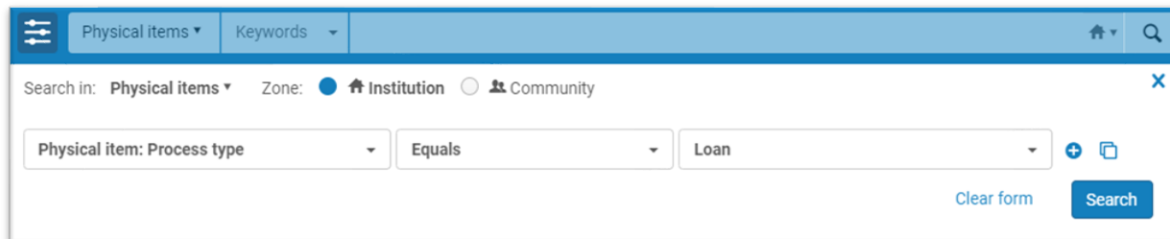
- This retrieves all items that are not currently on shelf, and are not available for circulation.



The screenshot shows the Alma search interface. The top navigation bar includes 'Physical Items' and 'Keywords'. The search criteria are set to 'Physical items' and 'Zone: Institution'. The search filters are 'Physical item: Base status', 'Equals', and 'Item not in place'. There are buttons for 'Clear form' and 'Search'.

- Check Items on Loan

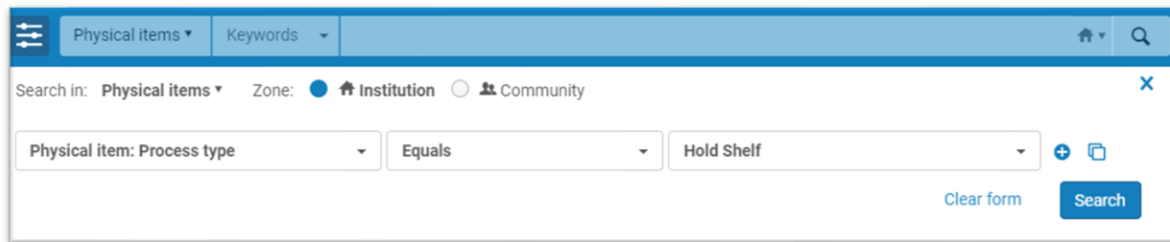
- Some items from loans extract may migrate as Process Type "Lost" due to the number of overdues.



The screenshot shows the Alma search interface. The top navigation bar includes 'Physical Items' and 'Keywords'. The search criteria are set to 'Physical items' and 'Zone: Institution'. The search filters are 'Physical item: Process type', 'Equals', and 'Loan'. There are buttons for 'Clear form' and 'Search'.

- Check Items on Hold shelf

- Totals for holds or loans in Alma may be lower than in data if items were converted during P2E.



The screenshot shows the Alma search interface. The top navigation bar includes 'Physical Items' and 'Keywords'. The search criteria are set to 'Physical items' and 'Zone: Institution'. The search filters are 'Physical item: Process type', 'Equals', and 'Hold Shelf'. There are buttons for 'Clear form' and 'Search'.

Technical Migration Status

This status is set by a lack of 1:1 mapping with ILS process statuses. Items will not circulate with this status.

Physical Items | Keywords

Search in: Physical items | Zone: Institution | Community

Physical item: Process type | Equals | Technical - Migration

Clear form | Search

Physical Item Editor

General | ENUM/CHRON | **Notes** | History

Functional Notes

Public note

Fulfillment note

Internal Notes

Internal note 1: **Status: Lost and Paid**

Internal note 2: Non Public Note: wed Dec 11 2019: Bill 530.00, lost by .p10037985

Internal note 3: Item Code 1: 0

Statistics Notes

Statistics note 1: Item Use 3: 10

Statistics note 2: Number of Renewals: 0

Statistics note 3: Internal Use Count: 0 | Last Checkout Date: 12/05/2019 | Last Year Circ: 0

Holdings

Ethel K. Smith Library: Main Stacks; M1620.5.S396 K3

Holdings ID: 226567880007811

View all holdings

Barcode: 31896000287593

Item ID: 236567870007811

View all items

Process type: **Technical - Migration**

MMS ID: 991000423479707811

Browse shelf listing

Status: Item not in place

Reason for status in the Item's "Notes" tab, Internal note 1

Value comes from Migration Form, Status tab, marked as "0" or "not on shelf."

Technical Migration Status

To clean up these records, there are four main workflows, depending on the status and desired result. You will first **create a set** of the items in question, and then **Run a Job**, with one of the following options:

1. Change the status from "Technical Migration" to "Missing" (Job = Change Physical Items; criteria: 'missing' = checked and 'missing' chosen in dropdown)
2. Remove the "Technical Migration" status in bulk (Job = Change Physical Items; criteria: 'missing' = checked and dropdown blank)
3. Bulk withdraw items (Job = Withdraw Items)
4. Create a work order for the item (Job = Create Physical Item Work Orders)



Inventory: Electronic Resources

Check Electronic Resources


Electronic Collections or Electronic Portfolios searches 

Local (created by P2E process)






Modern Scholar (Modern Scholar)
Type: Aggregator package
Services: Full Text (Available)
Creation Date: 2015-09-15 10:19:51
Modification Date: 2015-09-17 11:57:49


 [Available For](#) [Other details](#)

Linked to the Community Zone (created from link resolver)




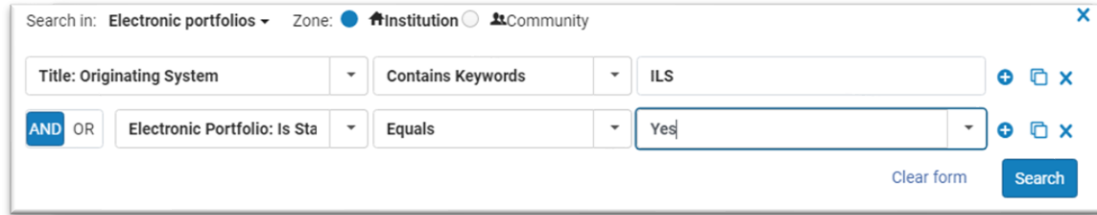


ProQuest Banking Information Source
Type: Aggregator package
Services: Full Text (Available)
Interface name: ProQuest New Platform
Creation Date: 2016-02-17 16:53:48
Modification Date: 2016-02-17 16:53:48

 [Available For](#) [Other details](#)

Check Electronic Resources - P2E

- Check number of P2E records 



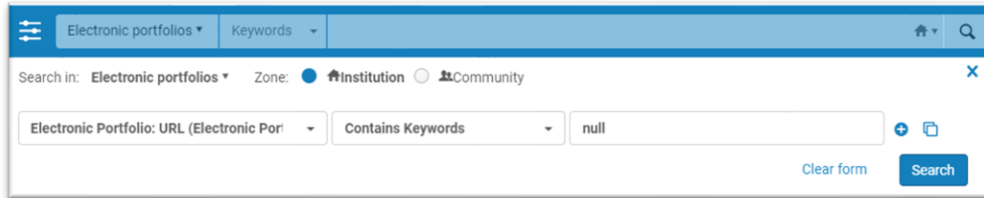
Search in: Electronic portfolios Zone: Institution Community

Title: Originating System Contains Keywords ILS

AND OR Electronic Portfolio: Is Sta Equals Yes

Clear form Search

- Check broken links 

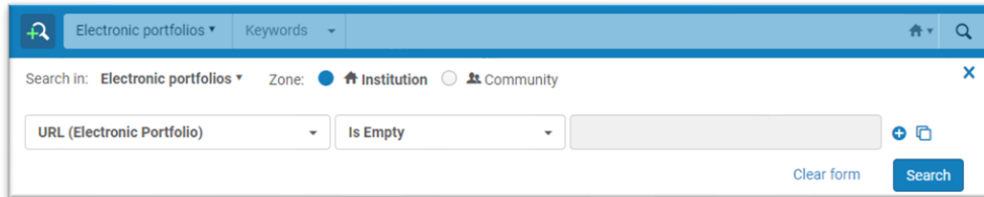


Electronic portfolios Keywords

Search in: Electronic portfolios Zone: Institution Community

Electronic Portfolio: URL (Electronic Por Contains Keywords null

Clear form Search



Electronic portfolios Keywords

Search in: Electronic portfolios Zone: Institution Community


URL (Electronic Portfolio) Is Empty

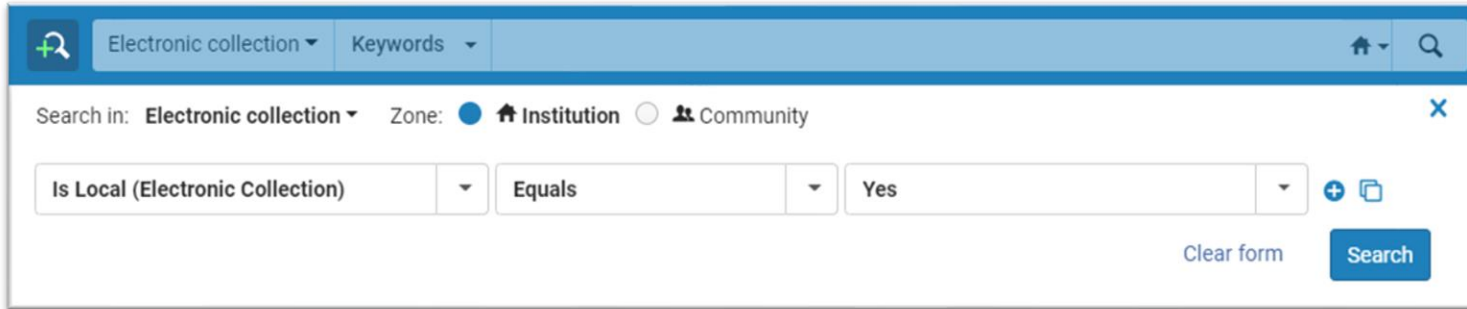
Clear form Search

Note: For each bib provided in the P2E file, a portfolio is created for each 856 link. If a bib had multiple 856 links, there will be a portfolio created for each so the number of portfolios **should** exceed the number of bibs in the P2E file.

Note: You can use the **Export URLs** job to create a file of all URLs in your P2E portfolios. (This can be helpful for cleanup/identifying duplicates.)

Check Electronic Resources - P2E

- Check number of packages 

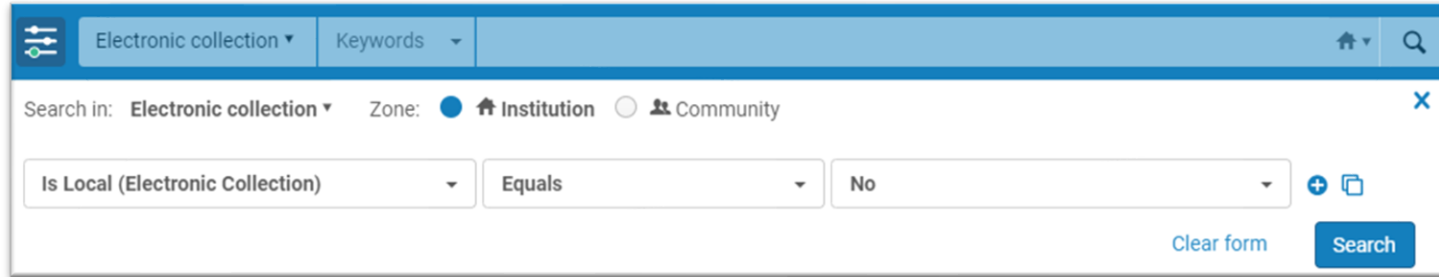


The screenshot shows a search interface with a blue header bar. On the left, there is a magnifying glass icon and a search bar containing 'Electronic collection' and 'Keywords'. On the right of the header bar are a home icon and a search icon. Below the header bar, there is a search area with 'Search in: Electronic collection' and 'Zone: Institution' (selected) and 'Community'. Below this, there are three filter boxes: 'Is Local (Electronic Collection)' with a dropdown arrow, 'Equals' with a dropdown arrow, and 'Yes' with a dropdown arrow. To the right of these boxes are a plus icon and a document icon. At the bottom right of the search area are 'Clear form' and a blue 'Search' button.

- Facets Type = Database
- All P2E collections migrate as "database", with no portfolios attached
 - Collection type can be manually changed and local portfolios attached
 - Collection records could also be linked to CZ, with option to retain local bib record or use the CZ bib record

Check Electronic Resources - Link Resolver

- Check number of packages 

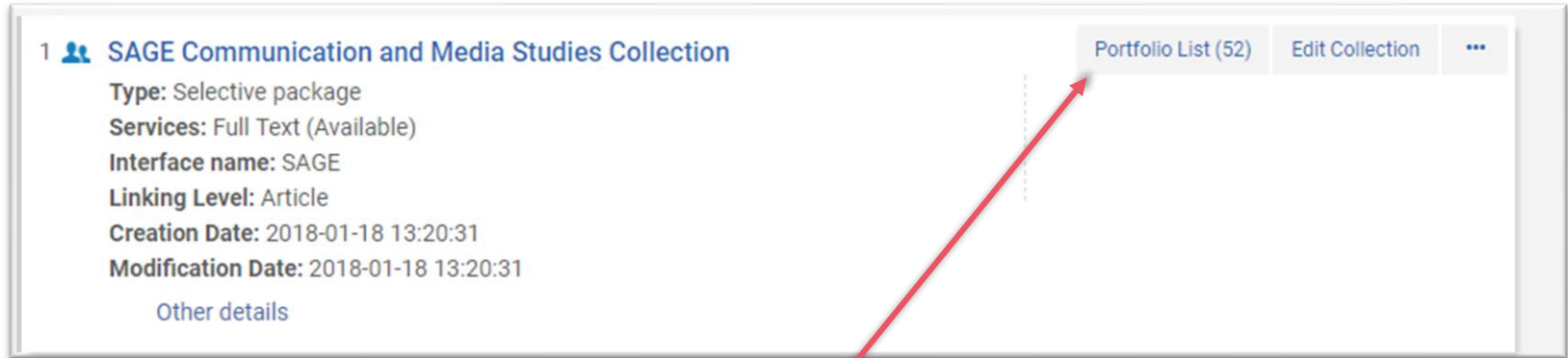



The screenshot shows a search interface with a blue header bar. On the left, there are two tabs: 'Electronic collection' and 'Keywords'. On the right, there are icons for home and search. Below the header, the search area includes 'Search in: Electronic collection' and 'Zone: Institution' (selected) and 'Community'. There are three filter boxes: 'Is Local (Electronic Collection)' with a dropdown arrow, 'Equals' with a dropdown arrow, and 'No' with a dropdown arrow. To the right of these boxes are a plus sign and a document icon. At the bottom right, there are 'Clear form' and 'Search' buttons.

- Facets Type = Database/Aggregator/Selective

Electronic Resources – Link Resolver

- Spot-Check portfolio lists 



1  **SAGE Communication and Media Studies Collection** Portfolio List (52) Edit Collection ...

Type: Selective package
Services: Full Text (Available)
Interface name: SAGE
Linking Level: Article
Creation Date: 2018-01-18 13:20:31
Modification Date: 2018-01-18 13:20:31

[Other details](#)

Title Listing for each Electronic Collection

More titles than expected? You can adjust manually in Alma.

Check Electronic Resources – Link Resolver


Configure special parameters in CZ packages


- **Packages that require special parameters**

- This will need to be done again at subsequent data loads.
 - Search for the collection

Advanced Search: Electronic Collection Name contains keywords "xxx"

Go to the collection, then:
Edit Service > Linking Tab > Add
values to Linking Parser
Parameters



1  **Gale Cengage Health and Wellness Resource Center** Portfolio List (1036) Edit Collection 

Type: Aggregator package
Services: Full Text (Available)
Interface name: Galegroup
Linking Level: Journal
Creation Date: 2019-04-30 06:21:09
Modification Date: 2019-04-30 06:21:09
Other details

2  **Gale Cengage Health Reference Center Academic** Portfolio List (44)

Type: Aggregator package
Services: Full Text (Available)
Interface name: Galegroup
Linking Level: Article

Dropdown menu options:
Delete
View
Descriptive Record
Create E-Activation Task
Publishing information
Edit Service
View It
Report To Ex Libris
Add Reminder

Check Electronic Resources - Link Resolver

Under Service > Linking, at bottom of page are any parameters that need to be populated. Refer to [this page](#) for instructions on which parameters may be relevant for your institution

Activation Service Description **Linking** Portfolios Notes History

General Linking Information

Parser Gale::OpenURL

Parser (override)

Parser parameters url= http://find.galegroup.com/openurl/openurl & url2=http://link.galegroup.com/apps/doc &dbase=HWRC &loc_id=\$\$LOC_ID &art=\$\$ART &docid=disable & url2=http://link.galegroup.com/apps/doc

Parser parameters (override)

URL type Dynamic URL Parser Parameters

Linking level **Journal**

Service is free? **Not Free**

Crossref supported **No**

Crossref enabled No Yes INHERIT

Proxy enabled No Yes

Proxy selected **Default(currently: none selected)**

Link Resolver Plugin

Plugin name -

Linking Parser Parameters

Parameter	Value
1 LOC_ID	<input type="text"/>
2 ART	<input type="text"/>

Inventory Reports

Overlap and Collection Analysis

- **Compare Electronic Collections**

- Using existing collections in Alma, to see which overlapping titles are included in each set
- Compare two IZ collections, two CZ collections, or IZ and CZ
- Compares coverage information at portfolio level

- **Look Up Titles**

- Upload an Excel file of ISSNs or ISBNs
- Provides report of what is activated in Alma, what isn't, and what is available in the CZ to activate

Inventory Reports

Duplicate Title Analysis

- Creates report identifying duplicate bib records in Alma
- Can match on:
 - System control number (035, with or without prefix)
 - ISBN
 - ISSN
 - Other standard identifier
- More information: [Using Duplicate Title Analysis](#)



Patrons

Check Patron Records

Find and Manage Users Save Query

Staff Public Contact All

1 - 20 of 404 + Add User

Account: All Role: All Status: All

Active	Name	Account Type	Record Type	Job Category	User Group	Expiration date	Blocks	Notes	Researcher
<input checked="" type="checkbox"/>	Aaronson, Aaron	Internal	Public	General Administrator	Undergraduate Student	06/06/2025		✓	
<input checked="" type="checkbox"/>	Abutbul, Niv	Internal	Public	Student Employee	Graduate Student	06/30/2020		✓	
<input checked="" type="checkbox"/>	Abutbul, Noam	Internal	Staff	Fulfillment Manager	Staff	-			
<input checked="" type="checkbox"/>	Acevedo, Octavio	Internal	Staff	Acquisitions Manager	-	-			
<input checked="" type="checkbox"/>	Administrator, Acquisitions	Internal	Staff	Acquisitions Operator	Staff	-			
<input checked="" type="checkbox"/>	Administrator, Alma	Internal	Staff	General Administrator	Faculty	-			
<input checked="" type="checkbox"/>	Administrator, Catalog	Internal	Staff	Cataloging Manager	Staff	-			
<input checked="" type="checkbox"/>	Administrator, Circulation	Internal	Staff	Fulfillment Manager	Staff	-			
<input checked="" type="checkbox"/>	Administrator, Discovery	Internal	Staff	General Administrator	Staff	-			
<input checked="" type="checkbox"/>	Administrator, Letter	Internal	Staff	General Administrator	Staff	-			
<input checked="" type="checkbox"/>	Administrator, Network	External	Staff	General Administrator	-	-		✓	

Check Patron Records

Find and Manage Users – things to look for:

- Patrons with loans, overdue/lost items, active fines/fees, blocks as applicable
- Identifier(s) migrated as expected
- User group assigned properly
- Contact information (address, phone, email)
- **Note:** Migration inserts "_SCRUBBED" into every email address. This is to ensure that no emails are mistakenly sent to patrons during Test Load.

The screenshot displays a user management interface with a navigation bar at the top containing tabs: General Information, Contact Information, Identifiers, Notes, Blocks, Fines/Fees, Demerits, Statistics, Attachments, Proxy For, and History. The 'Identifiers' tab is highlighted with a red box. Below the navigation bar, the 'User Information' section is visible, containing the following fields:

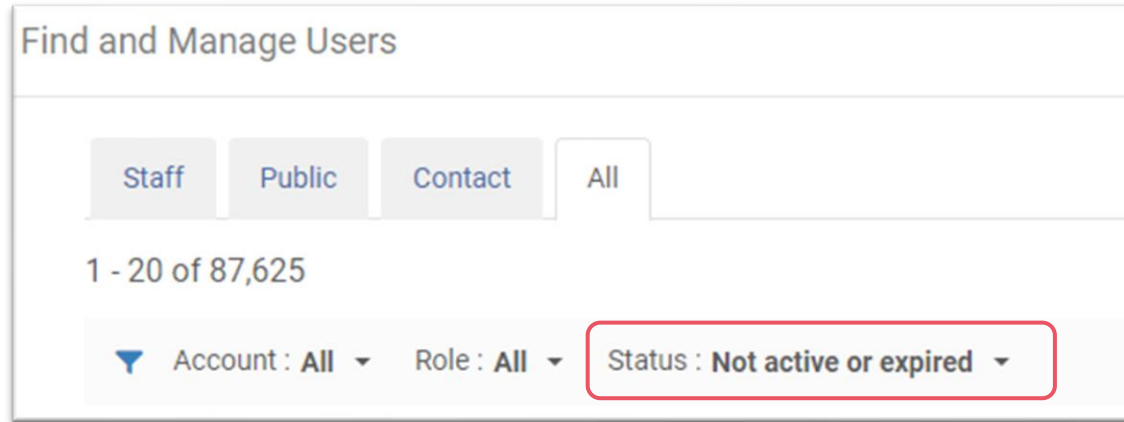
First name	Laurie A	Middle name	
Last name	Shaw Smith	Preferred first name	
Preferred middle name		Preferred last name	
Primary Identifier	AAMDSI	Title	
PIN number	<input type="text"/> <input type="button" value="Generate"/>	Job category	Please select a value
Job description	<input type="text"/>	Gender	
User group	Staff Level	Campus	
Website URL	<input type="text"/>	Preferred language	English
Status	Active	Status date	08/20/2020
Birth date	<input type="text"/> <input type="button" value="📅"/>	Expiration date	10/10/2020
Purge date	10/10/2020 <input type="button" value="📅"/>	Last patron activity date	-
Resource sharing library	<input type="text"/>	Purchase request library	
<input type="button" value="Selected Patron Letters"/>		Send message	General mail

At the bottom of the page, the text 'User Management Information' is visible.

Check Patron Records

Find and Manage Users

- Expired/inactive



Find and Manage Users

Staff Public Contact All

1 - 20 of 87,625

Account : All Role : All Status : Not active or expired

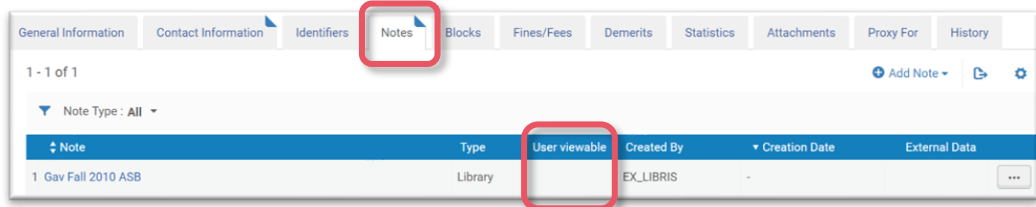
Note: You can **Run a Job** to bulk change expiration dates, if necessary

1. Manage Sets >> Add a Set (Logical) >> Set content type = User
2. Run a job >> Update/Notify Users

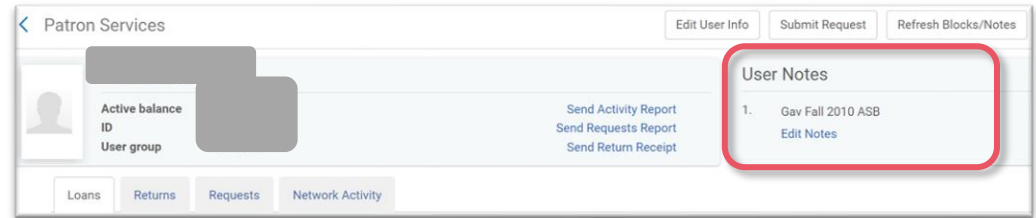
Check Patron Records

User Notes

- Check the user-viewable flag
- User Notes are migrated as internal data, so will NOT be overwritten by the SIS load; there is no job to delete these notes in batch.



Note	Type	User viewable	Created By	Creation Date	External Data
1 Gav Fall 2010 ASB	Library		EX_LIBRIS	-	



Patron Services

Edit User Info Submit Request Refresh Blocks/Notes

Active balance ID [redacted]
User group [redacted]

Send Activity Report
Send Requests Report
Send Return Receipt

Loans Returns Requests Network Activity

User Notes

1. Gav Fall 2010 ASB
Edit Notes



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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Barbara.Andress@clarivate.com