Testing Fulfillment Data Migration to Alma

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Introduction to This Document

Purpose of This Document

This document is designed to assist you in examining the fulfillment data that has been migrated to Alma from your current system and in testing the configuration of Alma that resulted from your answers in the Configuration Form. It is also designed to provide initial familiarity with Alma functionality. The data and configuration verifications described in this guide are not intended to be thorough. Rather, they contain recommendations informed by our knowledge of Alma, experience in migration and configuration, and customer feedback. We strongly recommend that you test data and configuration according to the guidelines below. However, we encourage you to go beyond these guidelines, especially if your migration or configuration included special or unusual requests, or if you have identified particular data or configurations as being of greater importance for your institution beyond what is recommended below.

In general, the purpose of this document is to:

- Outline how to search for and review migrated data
- Point out specific fields of interest for your review
- Describe basic checks of data, configuration, and functionality

The Fulfillment Data to Review in Alma

This document covers the following elements:

- Libraries and Locations – Libraries and locations are part of the basic infrastructure in Alma. Libraries and locations were migrated from your current system according to the input you provided in your Migration and Configuration forms. During implementation, you do not have access to the configuration screens for libraries or locations. However, you do have access to view-only screens for these entities.

- Patrons – **Patrons** refers to user records that were migrated from your current system. (Technically, in Alma, **patron** refers to a user record to which the patron role has been assigned. In this document, **patron** is used in a generic sense to refer to any user record in Alma).
- Loans – Active (open) loans are included in the migration of data from your current system. Historical (closed) loans are not included in the migration.
- Hold Requests – Hold Requests are placed by or on behalf of a patron for a particular physical item. Once the request has been placed, it must be processed – for example, by retrieving the requested item from its shelf location and placing it on a hold shelf. Only requests that have been placed on a hold shelf are migrated. Requests that have not yet been processed are not migrated. (It is recommended that you try to process all patron requests before your cut-over migration freeze. You may also want to inform your patrons that requests placed in your current system close to your cut-over date might need to be placed again after go-live).
- Fines and Fees- For overdue fines for loans that have not yet been returned, you may find a discrepancy in the amount of the fine. This is a known issue related to the time delay between the extract of your data from your current system and the configuration of applicable overdue fine policies in Alma. This issue is largely resolved by the cut-over.
- Circulation Relationships – Circulation relationships determine whether a patron may pick up physical inventory owned by one library at a different library. By default, all libraries have circulation relationships with all other libraries in your institution. However, this configuration can be changed via the configuration form (or afterwards, directly in Alma).
- Course Reading – Course Reading migration, if part of your implementation, can include courses and reading lists, faculty department.

Notes:

- The Alma interface is undergoing continuous updates. Your interface may differ slightly from the screenshots in this guide.
- This document assumes that you have a general familiarity with Alma Fulfillment. For more information concerning Alma Fulfillment, refer to the Fulfillment section of the Alma online help.

2

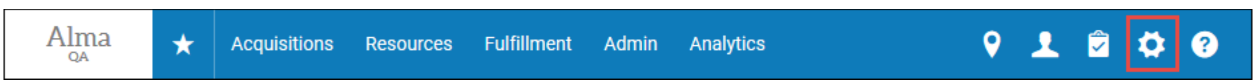
Libraries and Locations

Finding and Reviewing Libraries

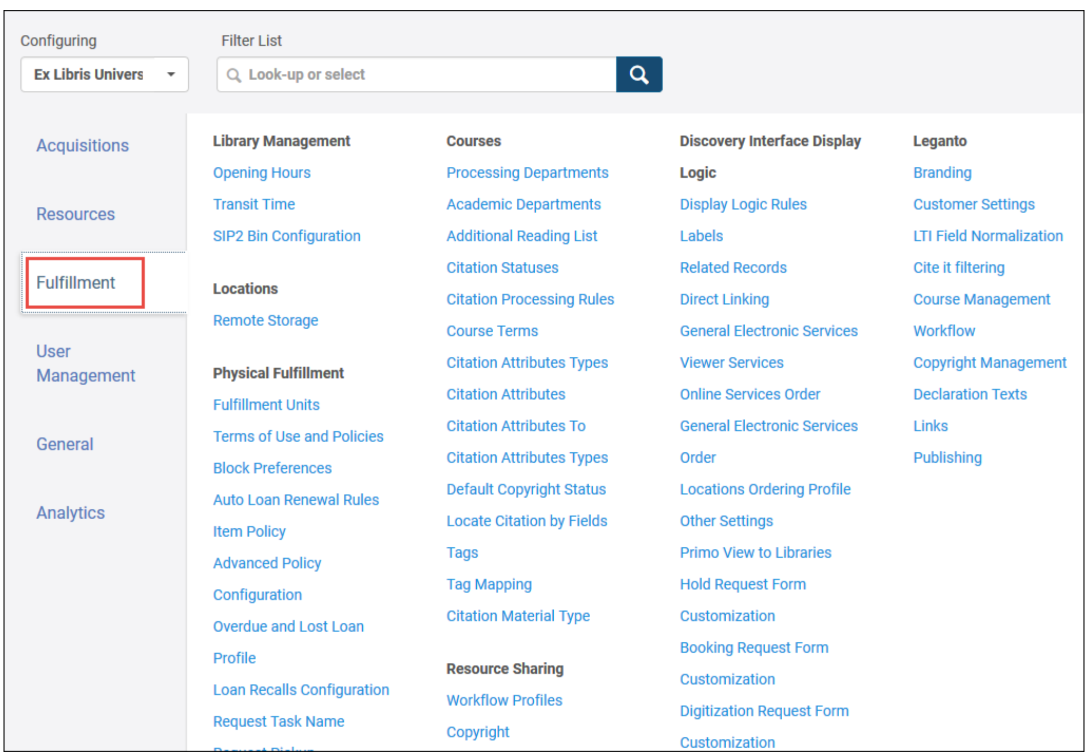
Finding Libraries

To view the list of libraries defined for your institution:

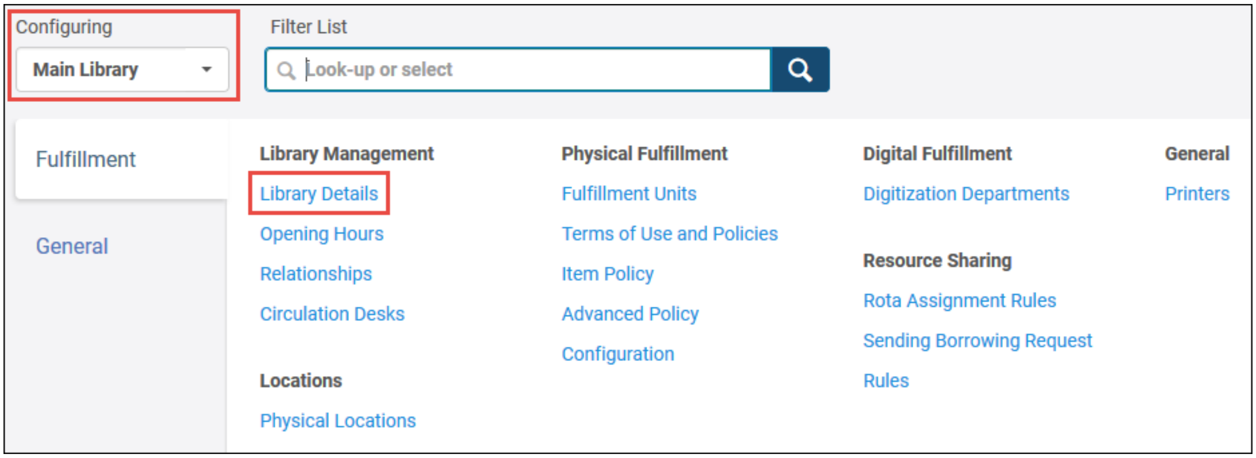
1 On the Alma main menu, go to the **Configuration Menu.**



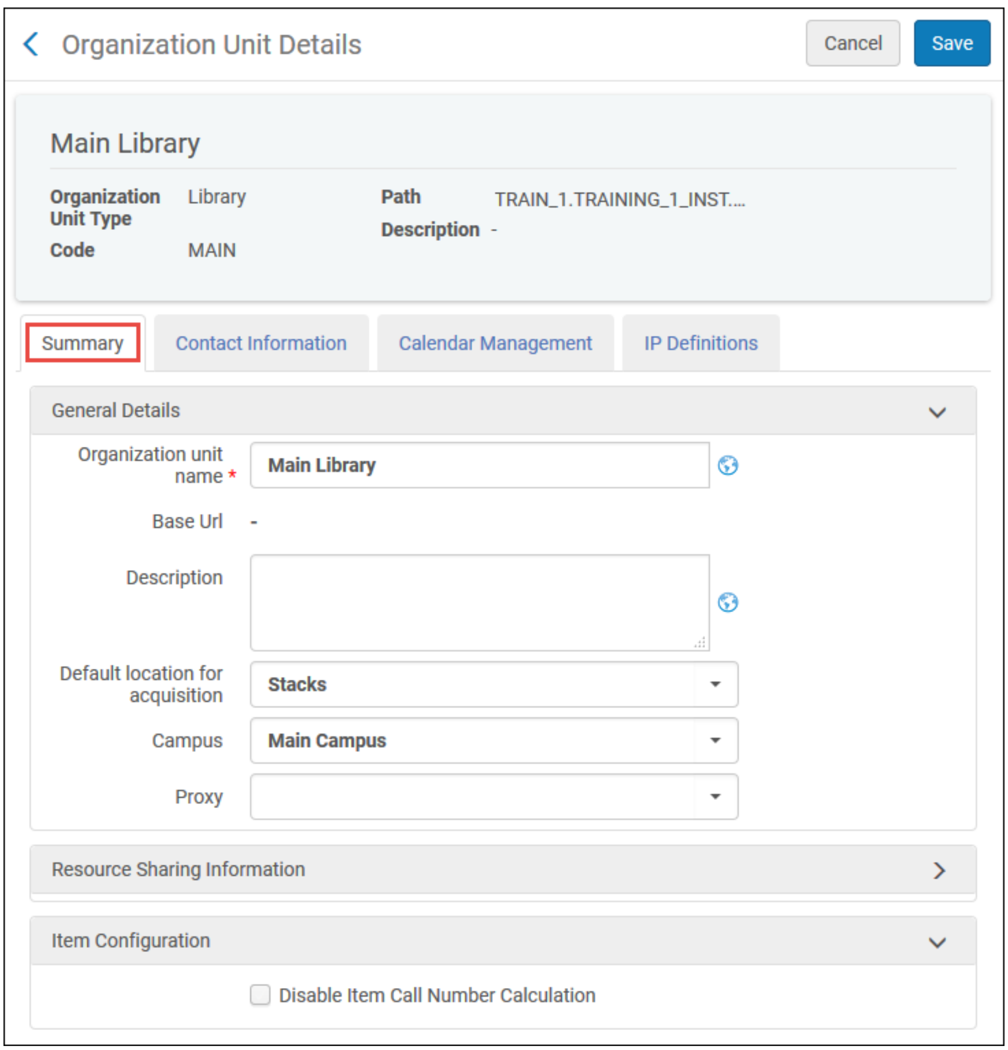
2 Click **Fulfillment**.



3 On the Configuration Menu, select one of your libraries from the **Configuring** drop-down box at the top of the page. (By default, the Institution is selected). Click **Library Details**.



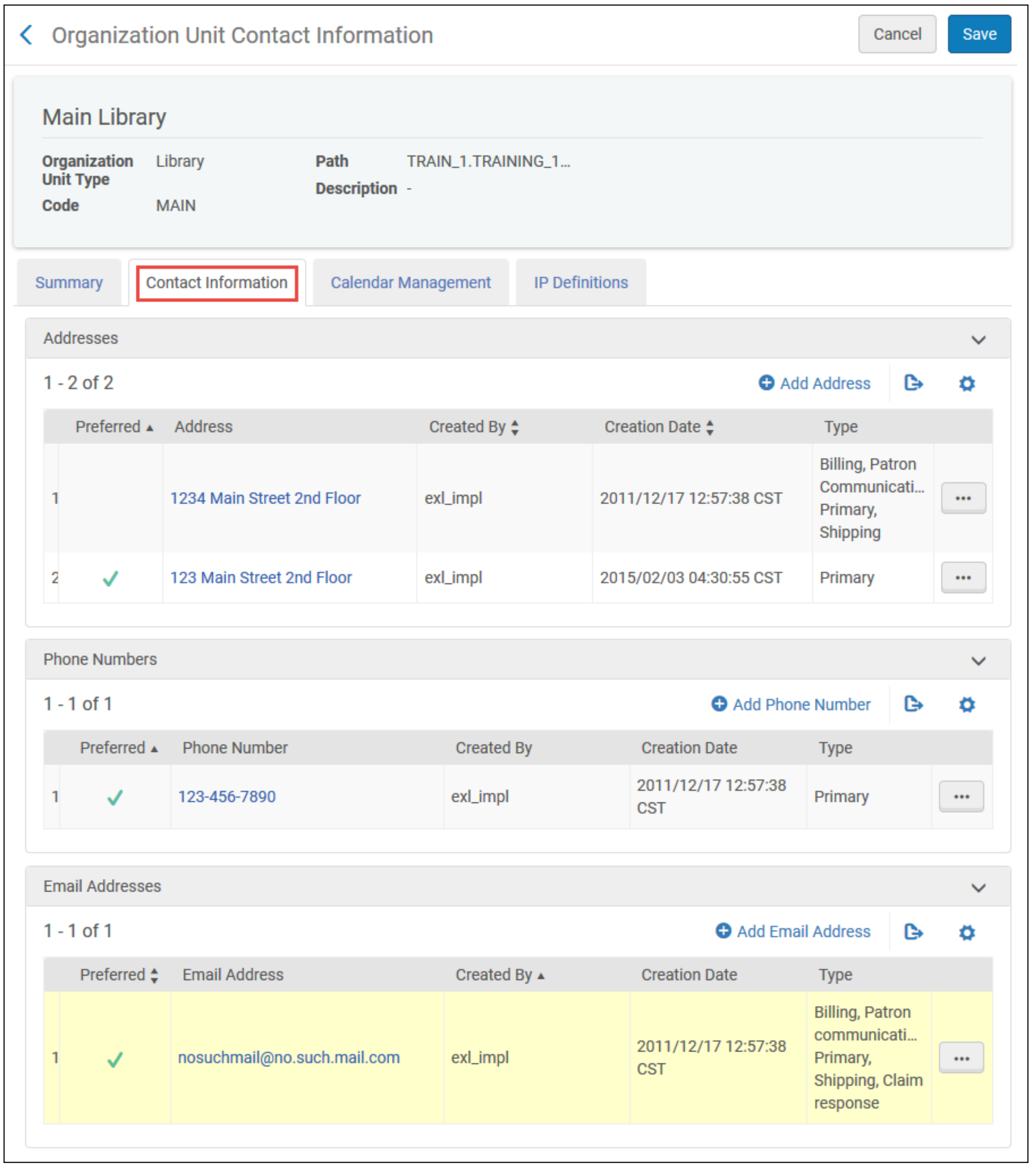
This opens the Summary tab for the selected library.



Reviewing Libraries

To review data for each individual library:

1. Ensure that the library **Name** and the library **Code** have been migrated or mapped correctly from the source system.
2. Open the **Contact Information** tab to review addresses, phone numbers, and e-mail addresses for the library.

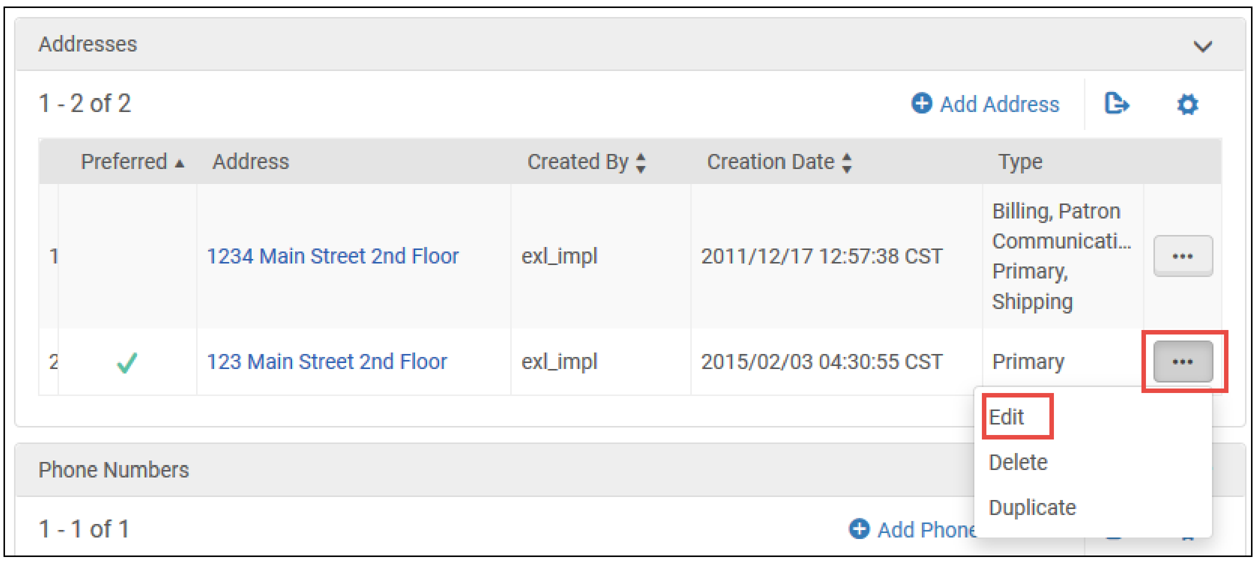


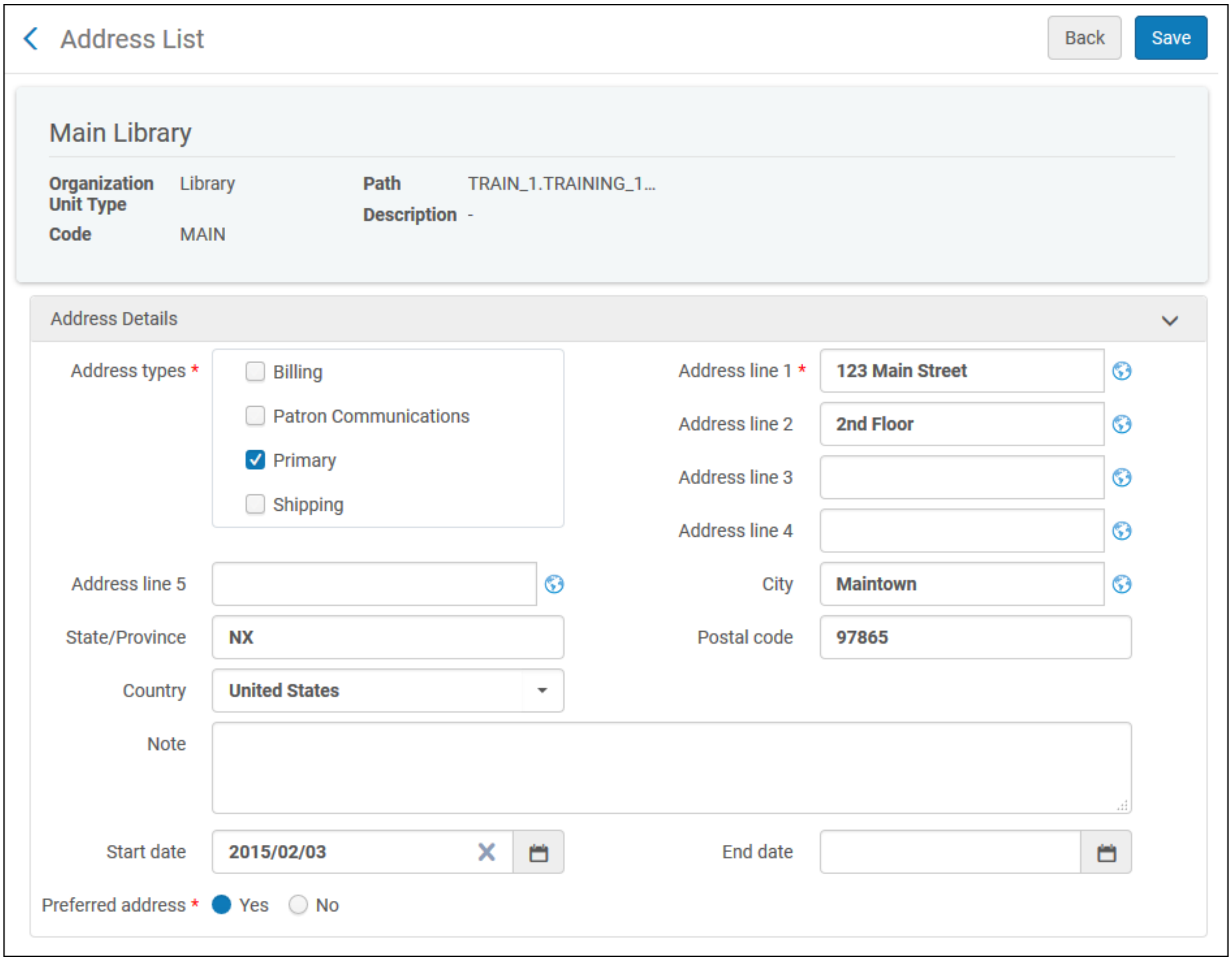
Note: If types of addresses, phone numbers, or e-mail addresses can be distinguished in the source system, the types will be mapped to their Alma equivalents. Otherwise, all possible types will be assigned to each address, phone number, or e-mail address.

If a preferred address, phone number, or e-mail address can be distinguished in the source system, this address, phone number, or e-mail address will have a check mark in the **Preferred** column.

The word **Scrubbed** will be added to all e-mail addresses. This is to prevent inadvertent transmission of messages during testing. The word will be removed as part of the switch to production.

3 To view further details for an individual address, phone number, or e-mail address, click its link or select **Edit** from the row actions list. For more information about Alma persistent elements, such as the row actions list, see [The Alma User Interface](#) in the Customer Knowledge Center.





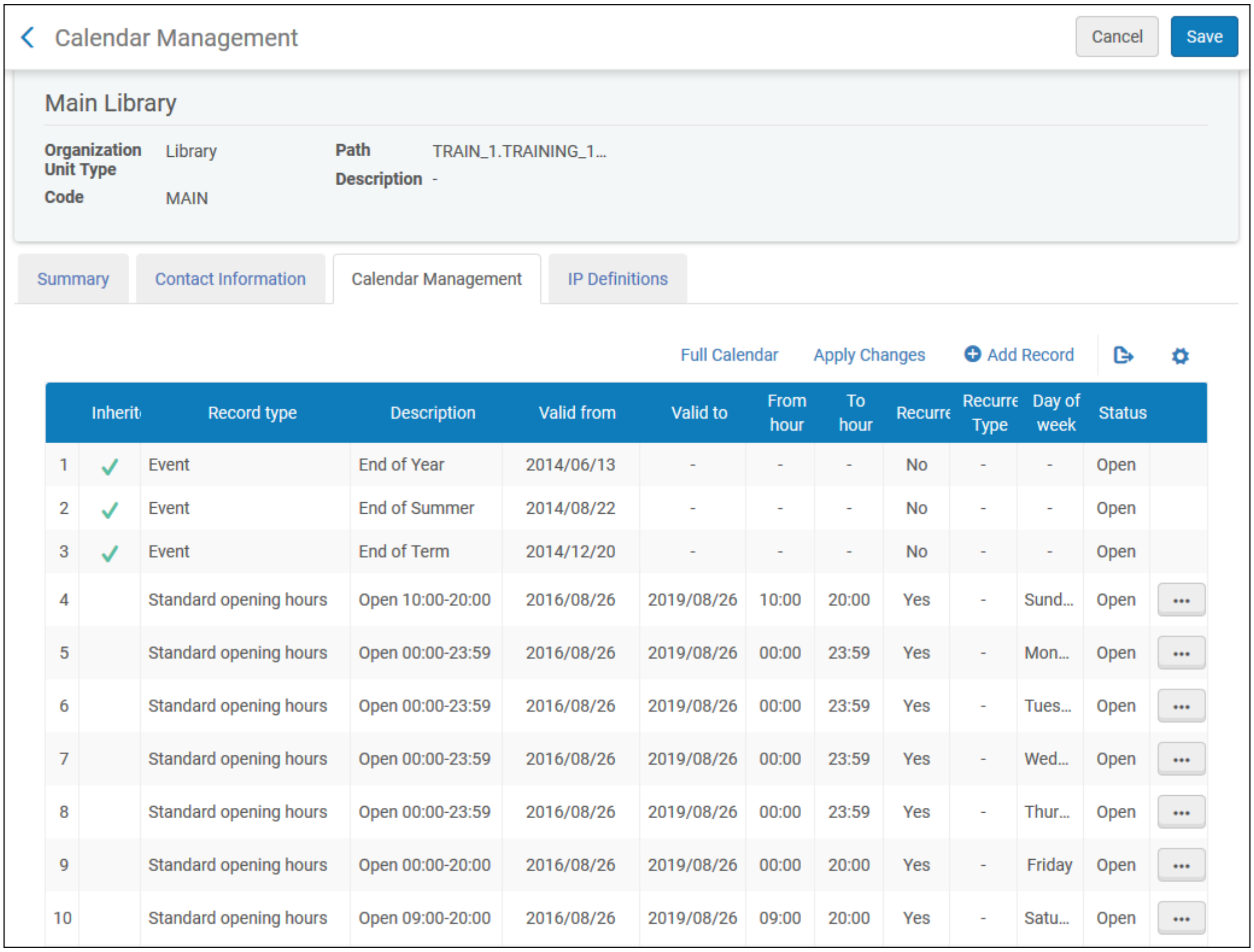
Note: The structure of the converted data will depend on the structure of the data in the source system. For instance, if City, State/Province, Postal code, and Country can be distinguished in the source system, each data element will be written to the correct Alma field. If not, all address data will be written to the **Street address** field in Alma.

Likewise, if phone numbers and e-mail addresses can be distinguished in the source system, they will be converted to phone number and e-mail addresses in Alma. Otherwise, they may be written to the **Street address** field.

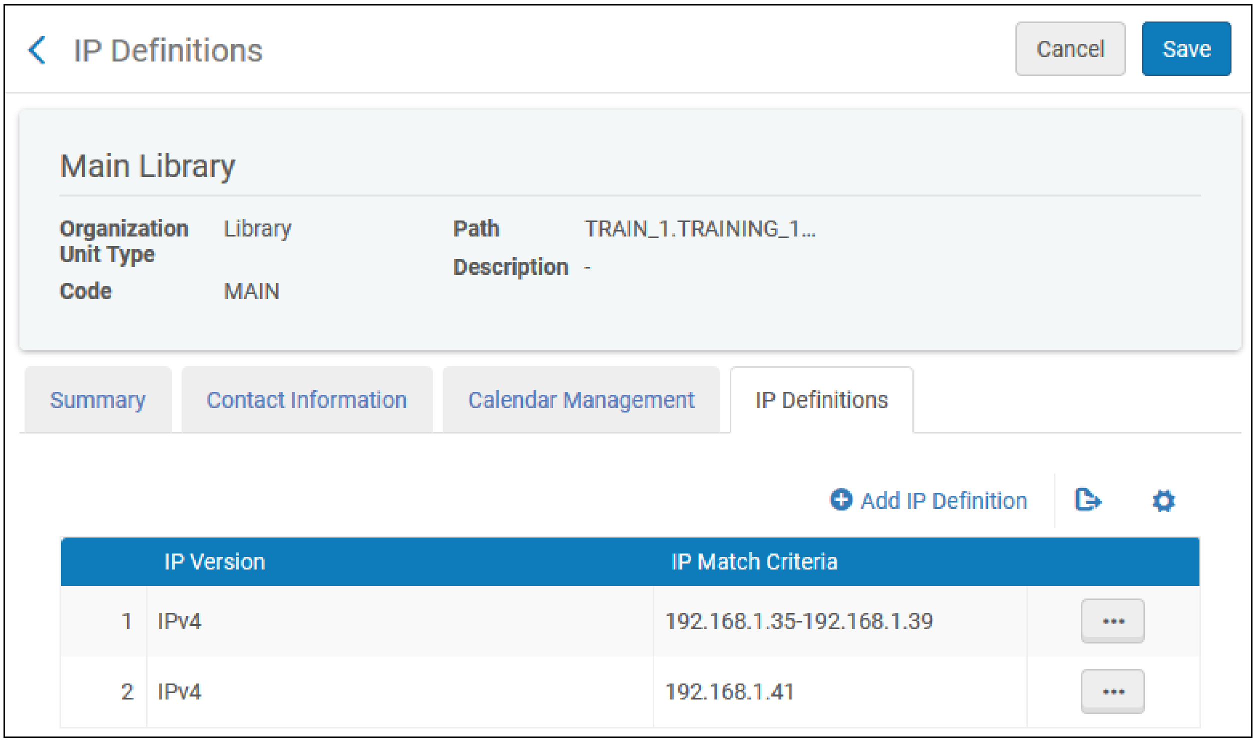
Any notes associated with the data will appear.

4 Click **Back** to return to the main Library Details page.

5 Open the **Calendar Management** tab to review the library's open hours and any exceptions. Verify that the entries in this screen reflect the values you entered in your Configuration Form.



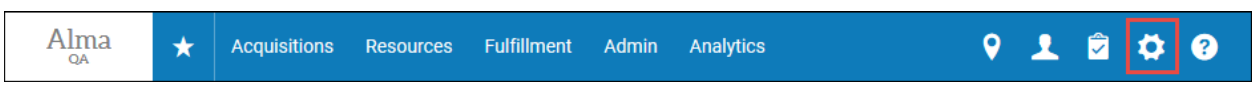
6 Open the **IP Definitions** tab. Any IP addresses you entered for this library in your Configuration Form should be reflected here.



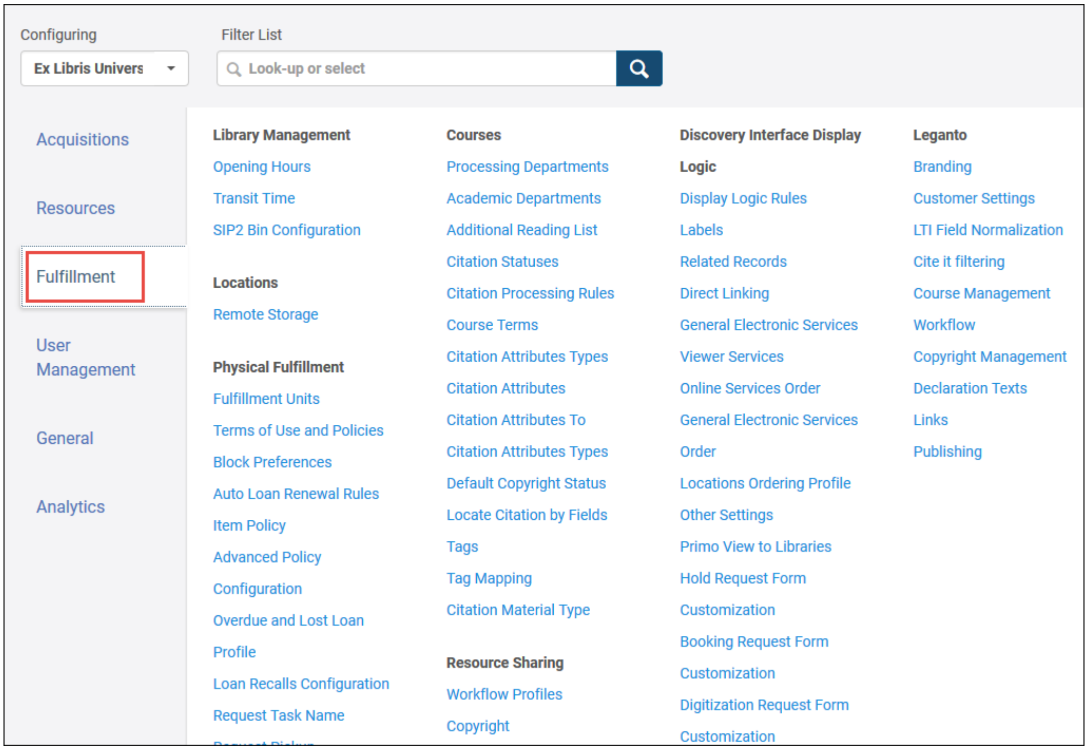
Finding and Reviewing Locations

Finding Locations

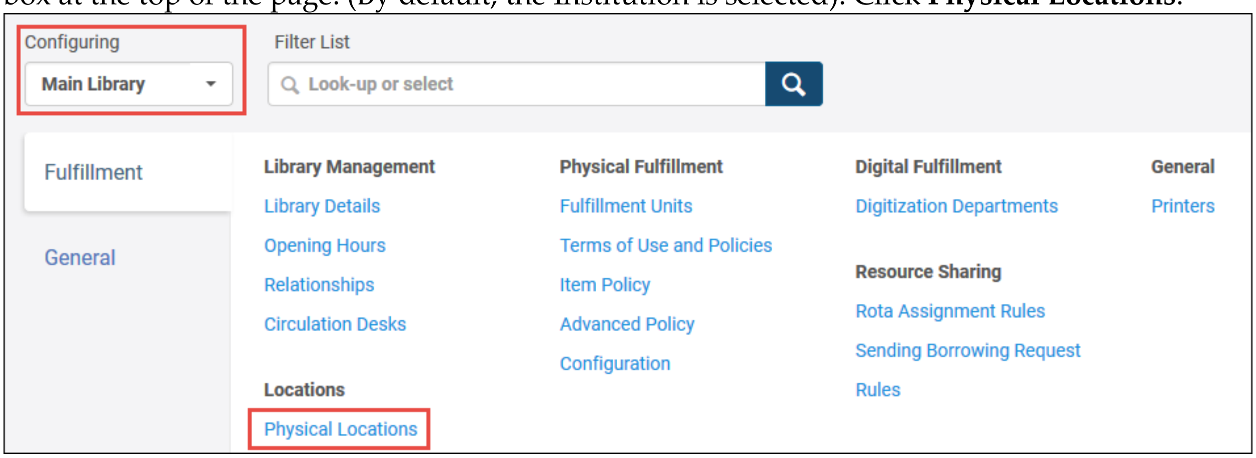
1 To view the list of physical locations defined for each library, on the Alma main menu, go to the **Configuration Menu.**



2 Click **Fulfillment**.



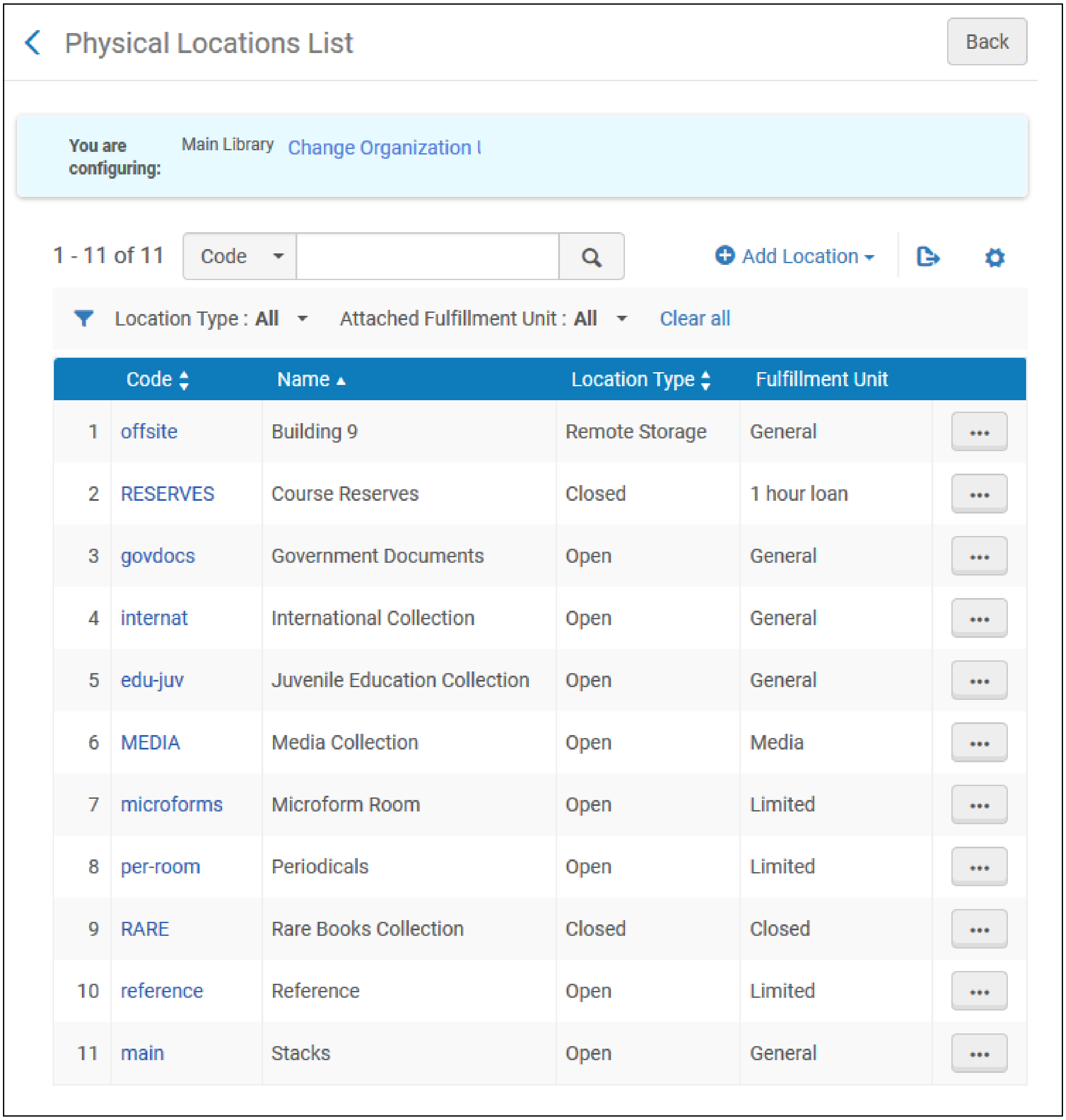
3 On the Configuration Menu, select one of your libraries from the **Configuring** drop-down box at the top of the page. (By default, the Institution is selected). Click **Physical Locations**.



This opens a list of physical locations for the library you selected.

Note that you can:

- Sort the list by Code, Name, or Location Type (ascending or descending in all cases).
- Search for a specific location by Code or Name using the Find box in the upper left corner of the page.



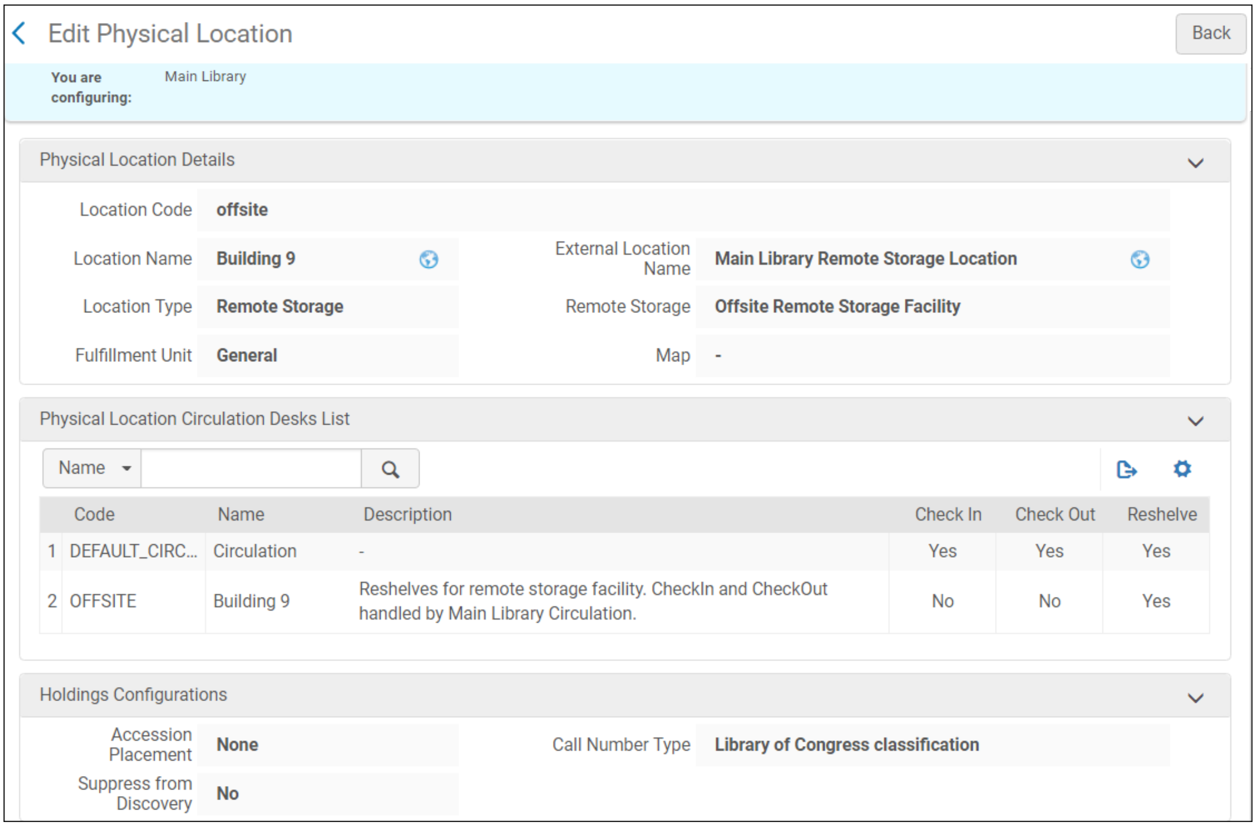
Reviewing Locations

1 Check the list of physical locations associated with each Alma library to ensure that all relevant source system entities have been migrated. Locations are a critical part of the overall Alma infrastructure.

2 Verify that each physical location **Code** and its corresponding **Name** has been migrated or mapped correctly.

3 Verify that the Fulfillment Unit is correctly assigned, according to the mapping you performed in the Locations tab of your configuration form.

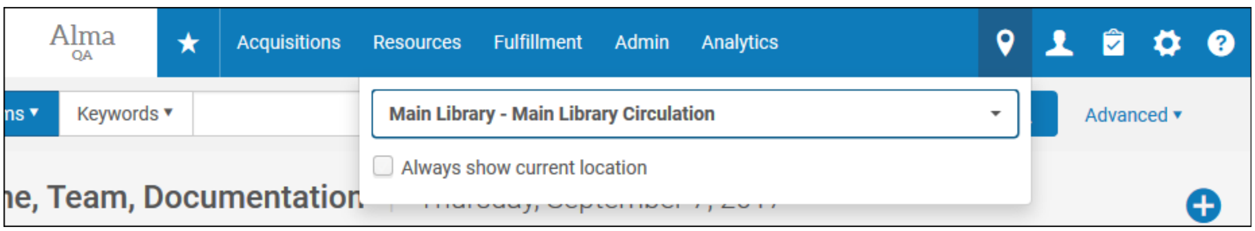
4 Select **View** from the row actions list to display a read-only view of the physical location (see below). Verify that each location is associated with a circulation desk and receives Check In, Check Out and/or Reshelve services. For more information about Alma persistent elements, such as the row actions list, see The Alma User Interface in the Customer Knowledge Center.



3

Patrons

Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



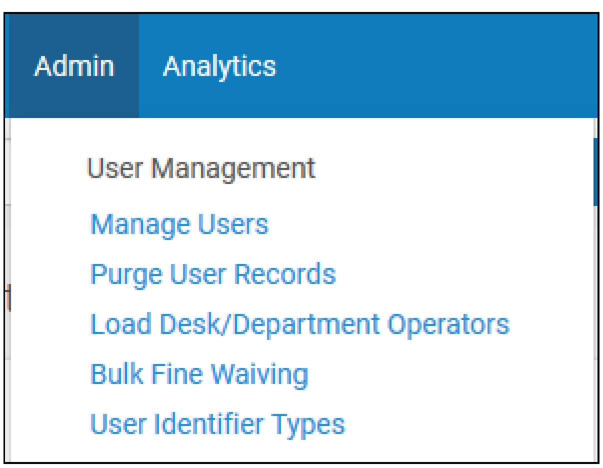
For more information on the persistent menu, see The Alma User Interface in the Customer Knowledge Center.

Finding Patrons

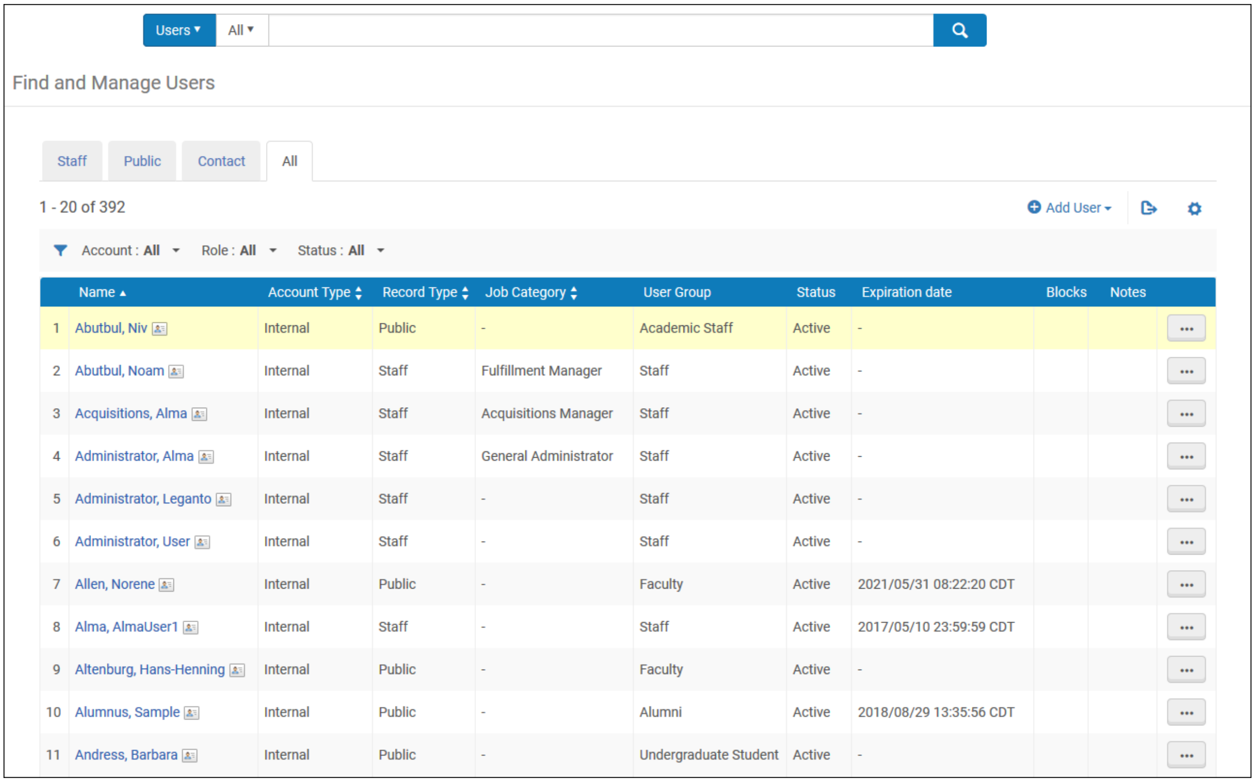
You can locate patron records in three ways.

1 From the Find and Manage Users link:

On the Alma main menu, go to **Admin > User Management > Manage Users**.

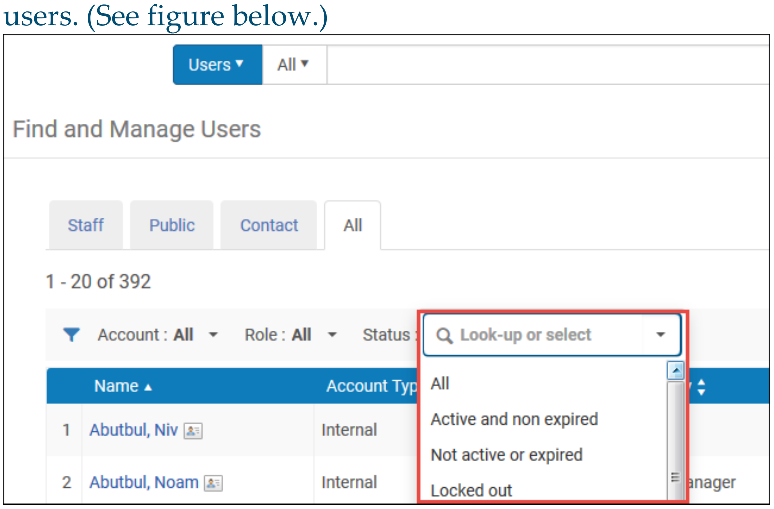


The list of patrons is displayed.



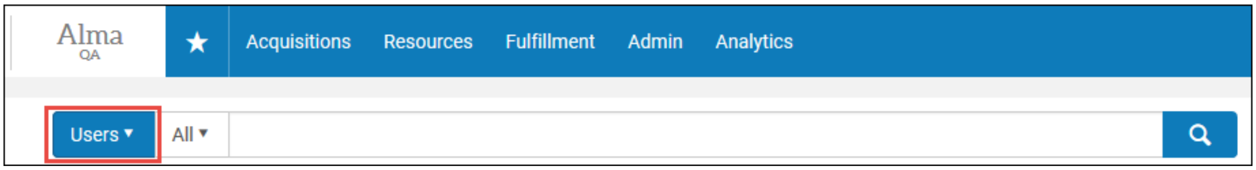
Note: You can click one of the tabs at the top left of the display to limit your results to Staff, Public, or Contact users. For the purposes of reviewing migrated data, it is recommended that you limit your results to Public users.

You can filter results also by Account Type, Role, or Status. You may find it useful to use the Status filter to limit results to Active and Non-expired, Non-active or expired, or Locked out users. (See figure below.)



2 Search for patrons using the persistent search box:

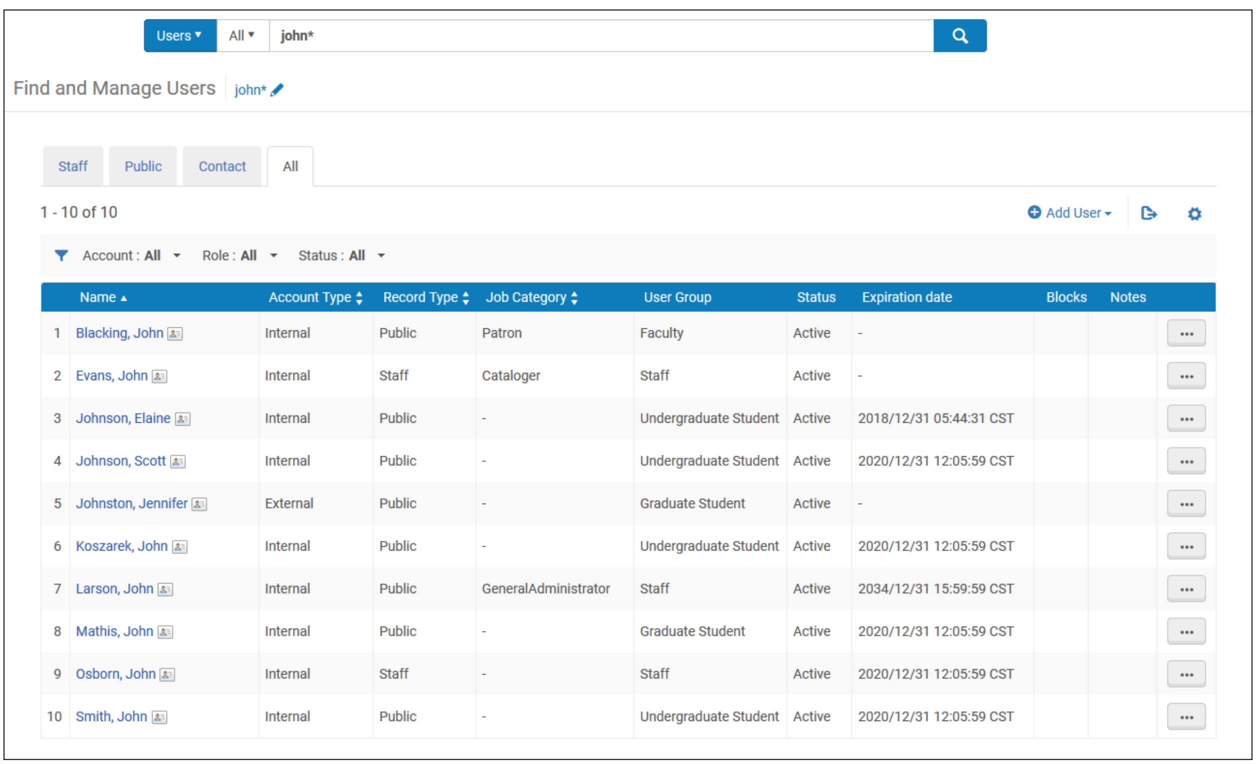
a Verify that **Users** is selected in the drop-down list that precedes the persistent search box.



Note: You can search for a specific user using the Find box at the top of the page. You can search using First Name, Middle Name, Last Name, Primary Identifier, Identifiers, E-mail address, User Name, or Job Category. Alternatively, you can retain the default of All to search all indexed data.

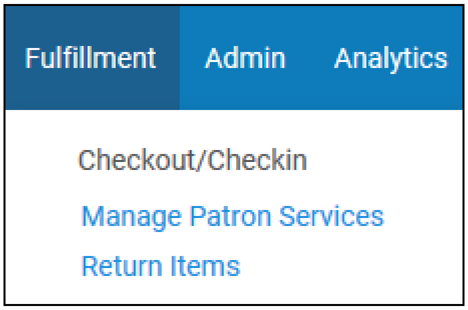
b Enter a search term.

The result is a list of patrons that match your search term(s). You can filter and sort this list the same way you can filter and search the full list.



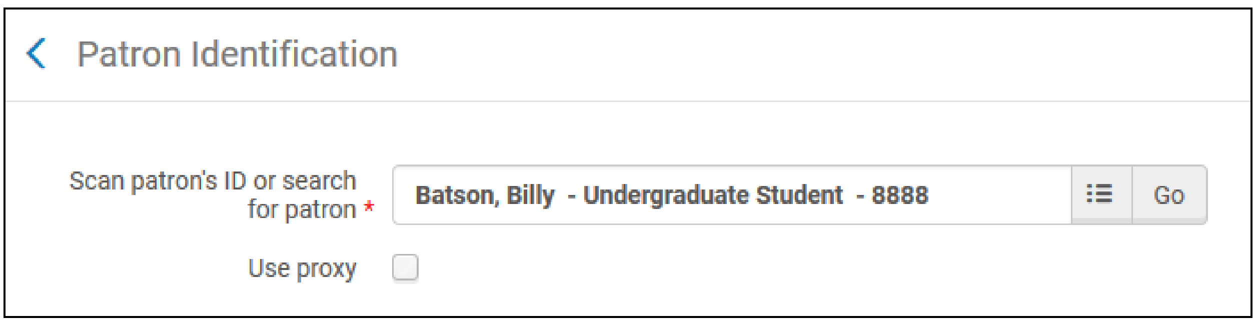
3 From the Manage Patron Services link:

a On the Alma main menu, go to **Fulfillment > Checkout/Checkin > Manage Patron Services**.



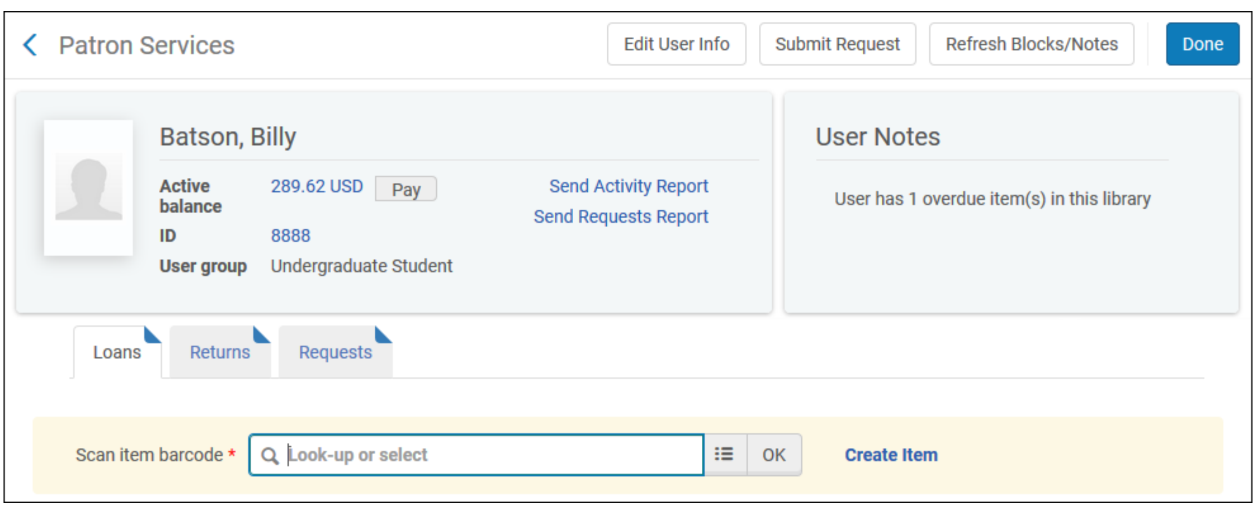
b In the search box, enter a patron barcode, or type all or part of a user name. If you are entering a name, wait until the system suggests possible names (which may take a few seconds), then select one of them from the list that appears and click **Go**.

Note: If you simply click Go after entering a name without the additional information that is in the system-supplied list, you will not retrieve any patron records.

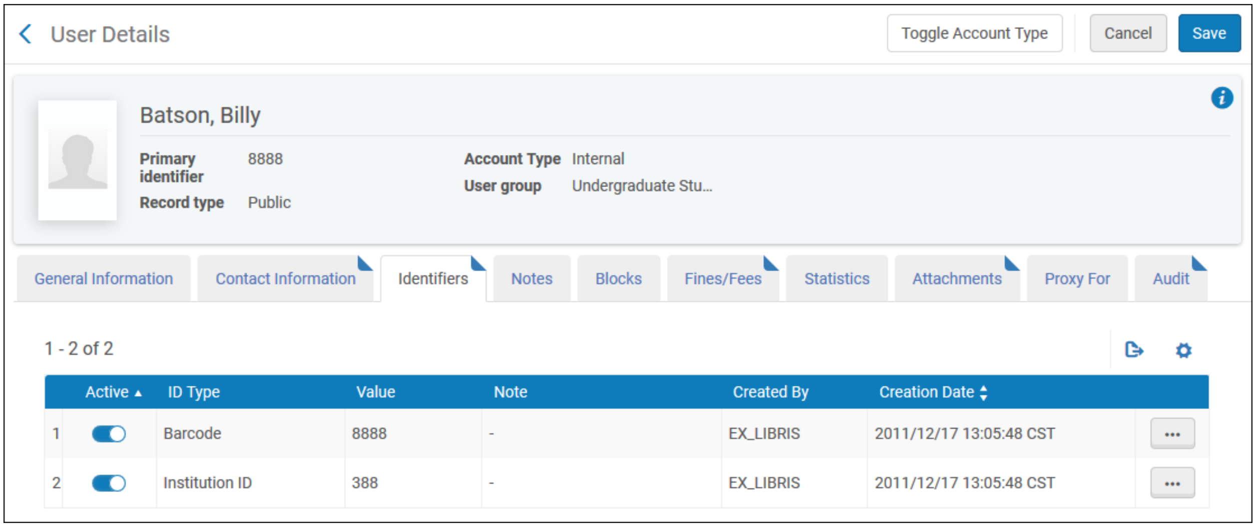


This opens the Patron Services page.

c Click the ID link.



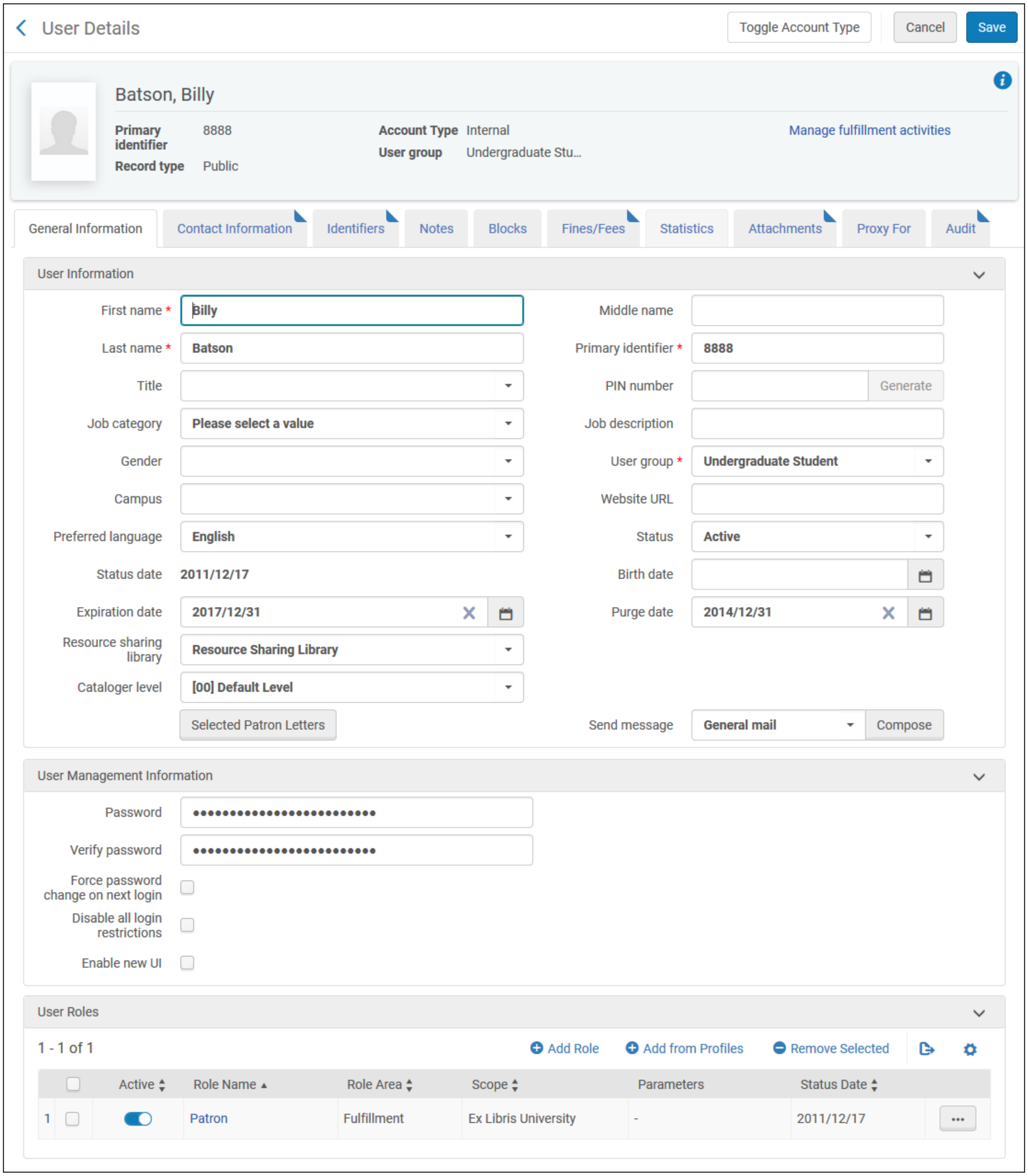
This opens the **Identifiers** tab of the full patron record.



d Open any of the other tabs.

Reviewing Patron Records

1 Open the **General Information** tab for an individual patron record. If you are starting from a list of patrons, either click the Name link or select **Edit** from the row actions list.



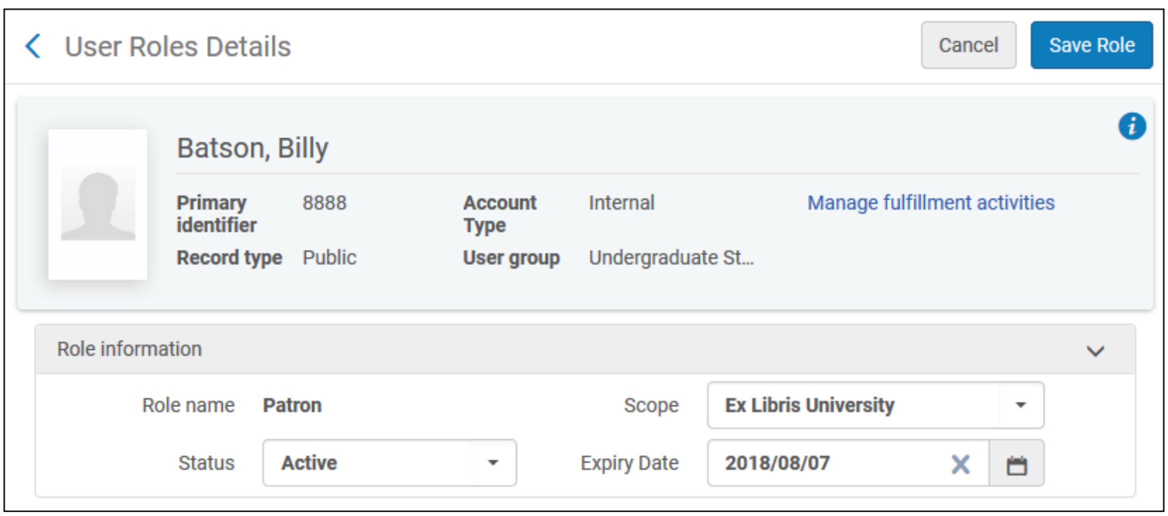
2 In your review, pay particular attention to the following data.

- **Record type**: The value should be **Public** for any patron who is not also a staff member.
- **Account type:** This value should be **External** if the record for the patron was created outside the source system (for example, in an ERP) and then imported into the source system. The value should be **Internal** if the record was created in the source system.

Note that if the account type is External, a number of fields in the General Information tab will be grayed out, indicating that they cannot be edited in Alma.

- **First name** and **Last name:** The migration form asks for a method to separate the first and last names. If the separator is used in the source system data, the first and last names are written to separate fields in Alma. If a separator is not used, the entire name is written to the **Last name** field, and the First name field will be blank. (To separate the fields, you can manually edit an individual record or use a batch process such as the SIS integration or users API.
- **Primary Identifier**: Usually, this is the ID that is used by patrons to log into Primo, although other identifier types can be used as well.
- **Status:** Values are **Active** or **Inactive**. If the status of the user cannot be determined from source system data, all patron records will have a status of Active.
- **Expiration date and Purge date:** If these values are present in the source system, they should appear in Alma. Note that the status date in migrated patron records will be the date of record load unless the record has been edited since the load.
- **User roles:** Every patron should have the **Patron** role.

  To view the **User Role Details** page, click the role name, or select **Edit** from the row actions list. On this page, you can view the **Status** and **Expiry date** for the role.

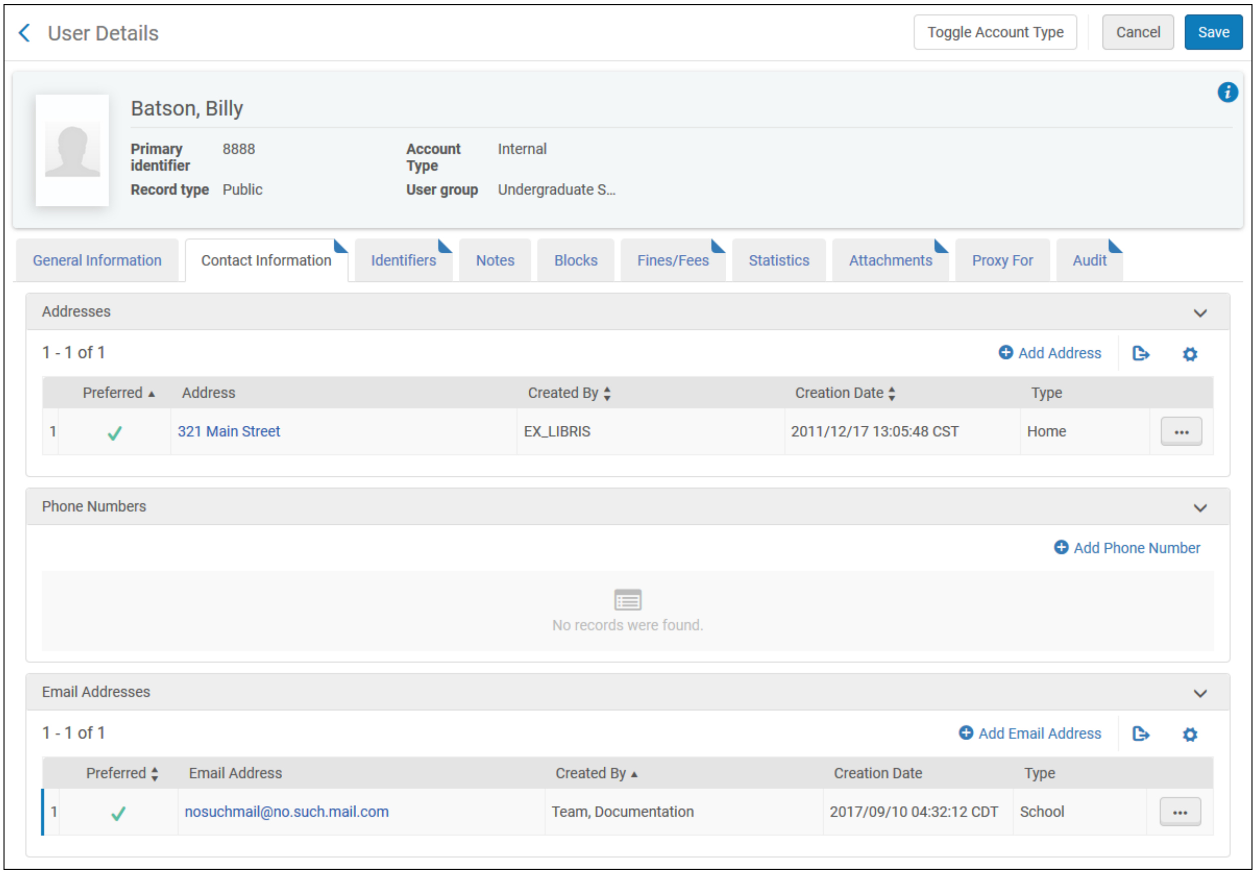


- **Contact Information Tab:** Open this tab to review patron address, phone number, and e-mail information.

Note: Any data that is duplicated in the source system will be duplicated in Alma.

All e-mail addresses will include the word SCRUBBED. This is to prevent inadvertent transmission of messages during testing. SCRUBBED will be removed from e-mail addresses as part of the switch to production.

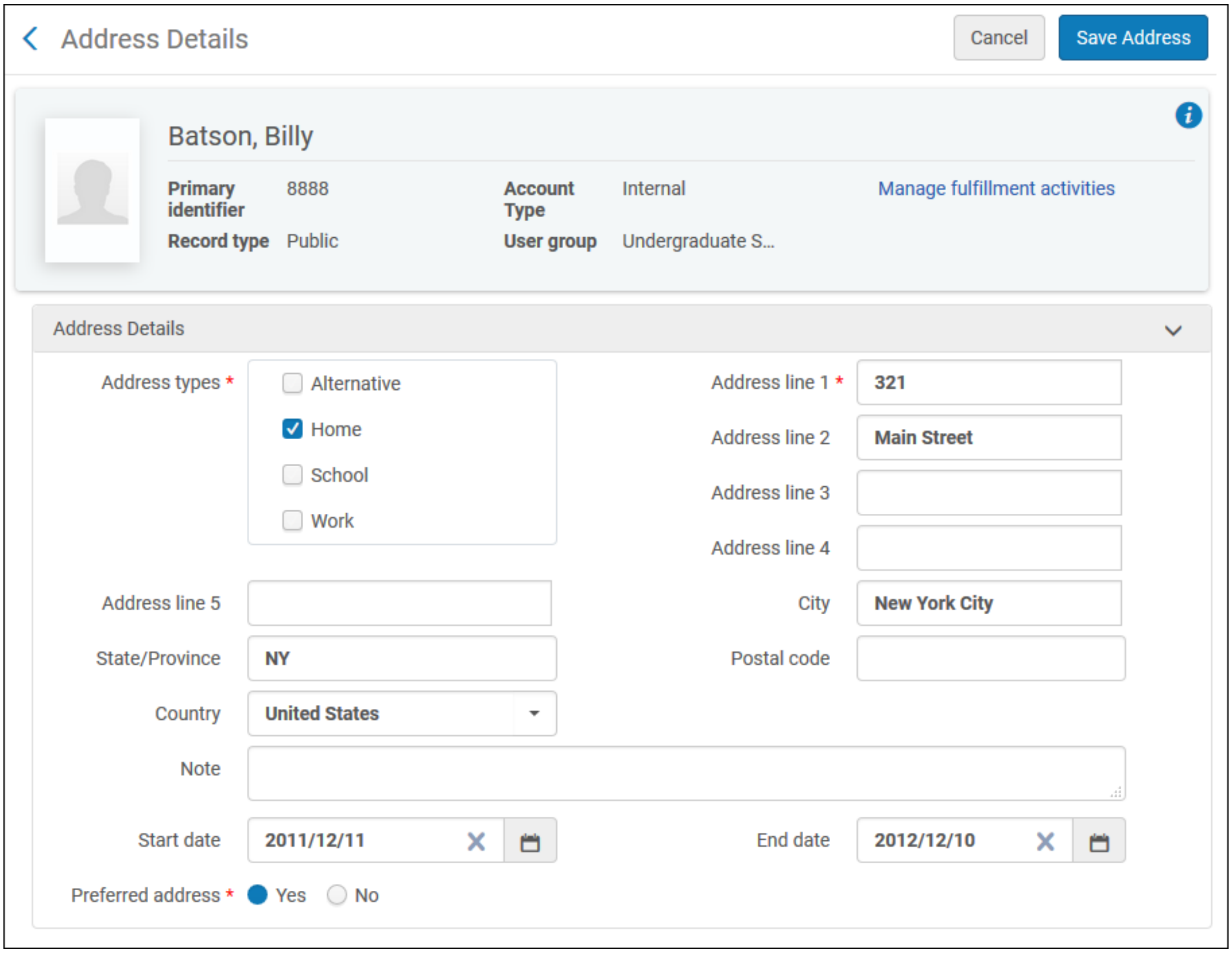
If there is a check mark in the External Data column, the data cannot be edited in Alma. However, additional data can be added in Alma.



3 Verify the accuracy of migrated data. Note these data elements:

- **Preferred:** If a preferred address, telephone number, or e-mail address can be distinguished in the source system, it will be marked with a check mark in the Preferred column.
- **Type:** If the source data includes an address type that cannot be mapped to a corresponding Alma type, the source system address type will be included in the **Note** field.

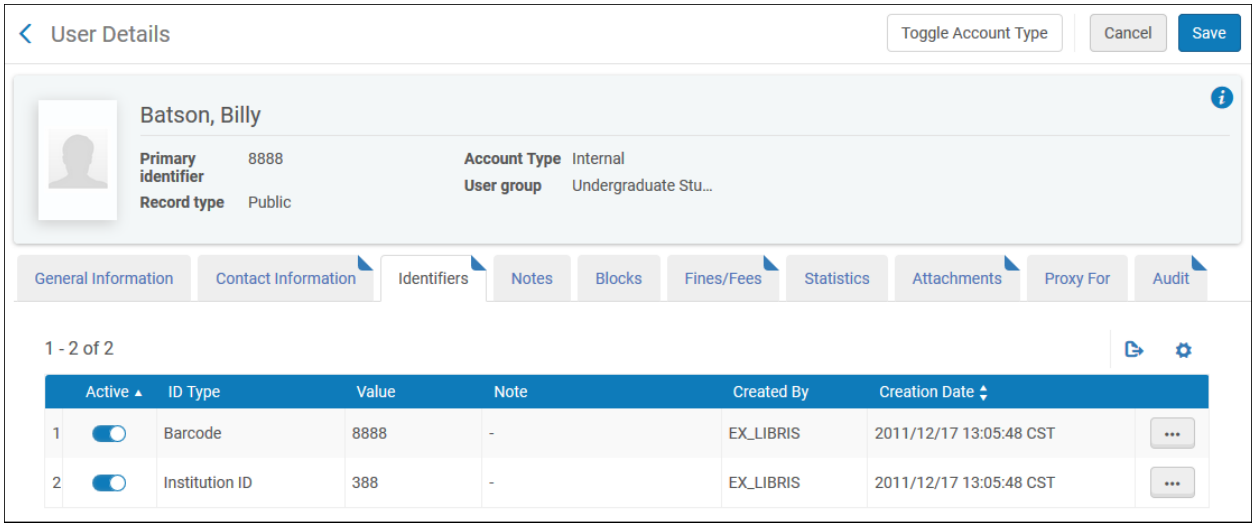
4 Open individual address records by clicking the address link or by selecting **Edit** from the row actions list.



Note the following details:

Address structure: If City, State/Province, Postal Code, and Country can be distinguished in the source system data, values will be written to the corresponding Alma fields. If they cannot, all address data will be written to the **Street address** field.

5 **Identifiers tab:** Open this tab to review patron identifiers. Note that if there is a check mark in the External Data column, the data cannot be edited in Alma. However, an identifier can be added in Alma.



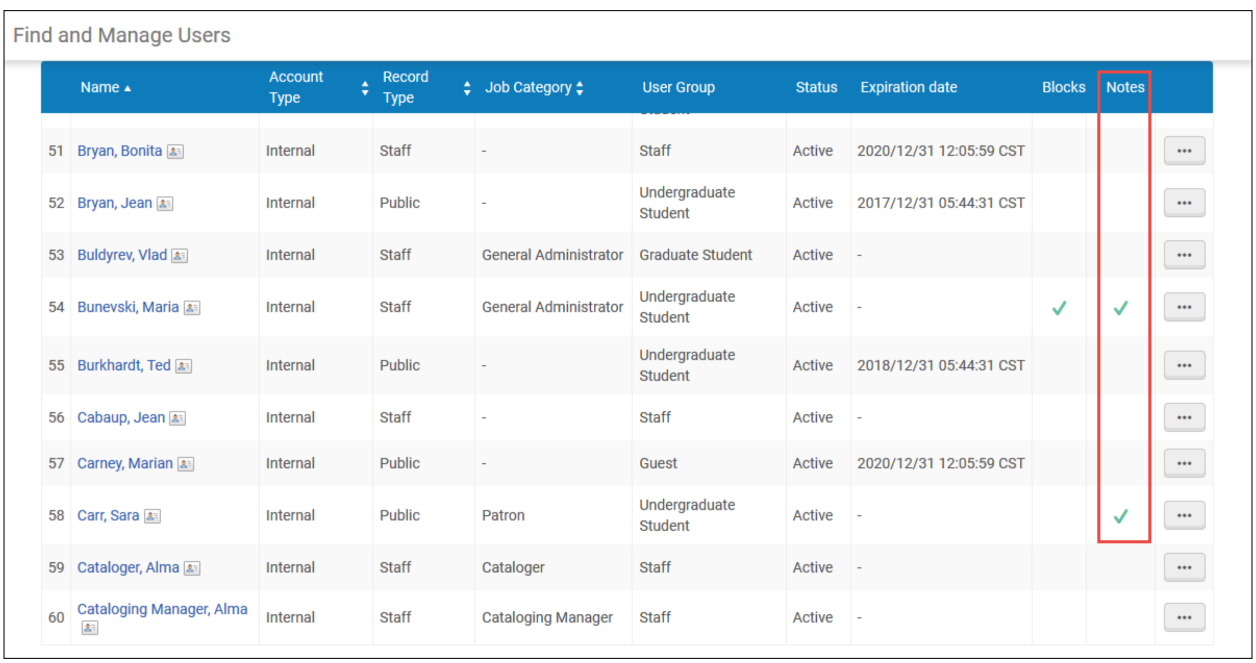
6 Verify the accuracy of converted data.

a There should be one ID in Alma corresponding to each ID in the source system.

b **Active:** There should be a check mark in this column if the ID is active, and no check mark if it is inactive.

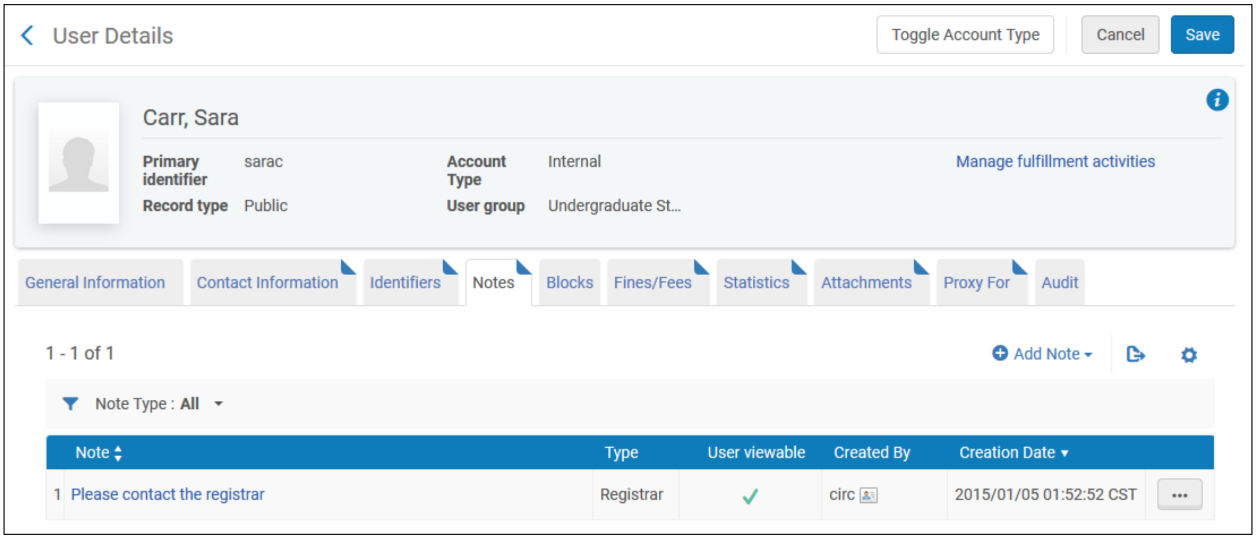
c **ID type** is based on source system definitions. Verify that a value for the ID type to be used for Primo authentication is present in the patron's record.

7 **Notes tab:** If there are note(s) in the patron record, there will be a check mark in the Notes column in the list of patrons.



	Name ▲	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
51	Bryan, Bonita	Internal	Staff	-	Staff	Active	2020/12/31 12:05:59 CST		
52	Bryan, Jean	Internal	Public	-	Undergraduate Student	Active	2017/12/31 05:44:31 CST		
53	Buldyrev, Vlad	Internal	Staff	General Administrator	Graduate Student	Active	-		
54	Bunevski, Maria	Internal	Staff	General Administrator	Undergraduate Student	Active	-	✓	✓
55	Burkhardt, Ted	Internal	Public	-	Undergraduate Student	Active	2018/12/31 05:44:31 CST		
56	Cabaup, Jean	Internal	Staff	-	Staff	Active	-		
57	Carney, Marian	Internal	Public	-	Guest	Active	2020/12/31 12:05:59 CST		
58	Carr, Sara	Internal	Public	Patron	Undergraduate Student	Active	-		✓
59	Cataloger, Alma	Internal	Staff	Cataloger	Staff	Active	-		
60	Cataloging Manager, Alma	Internal	Staff	Cataloging Manager	Staff	Active	-		

Open the Notes tab in an individual patron record to view the notes.

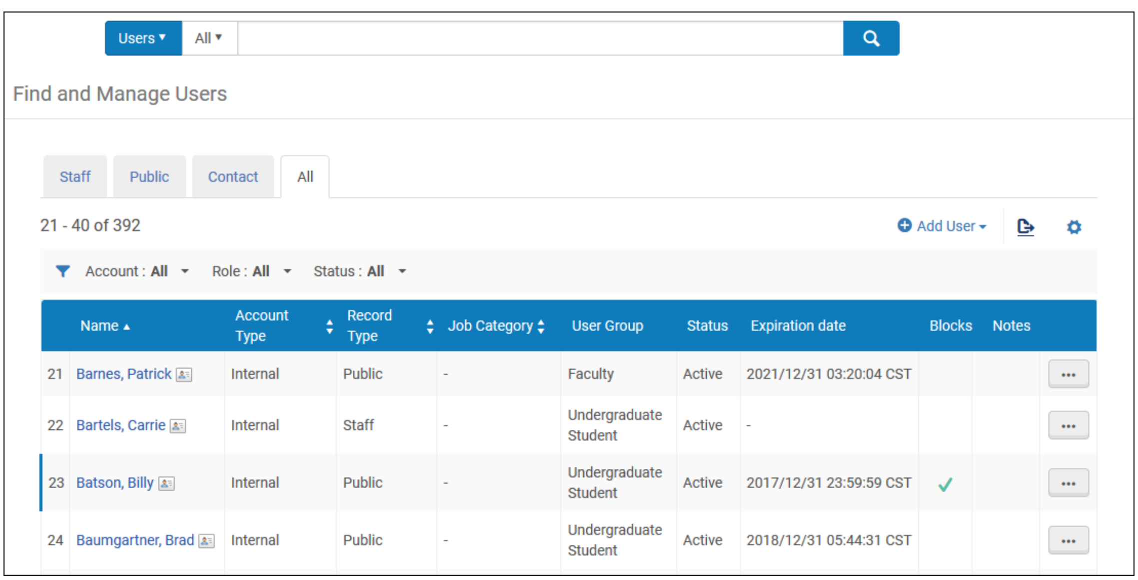


There should be a note in Alma corresponding to each note in the source system.

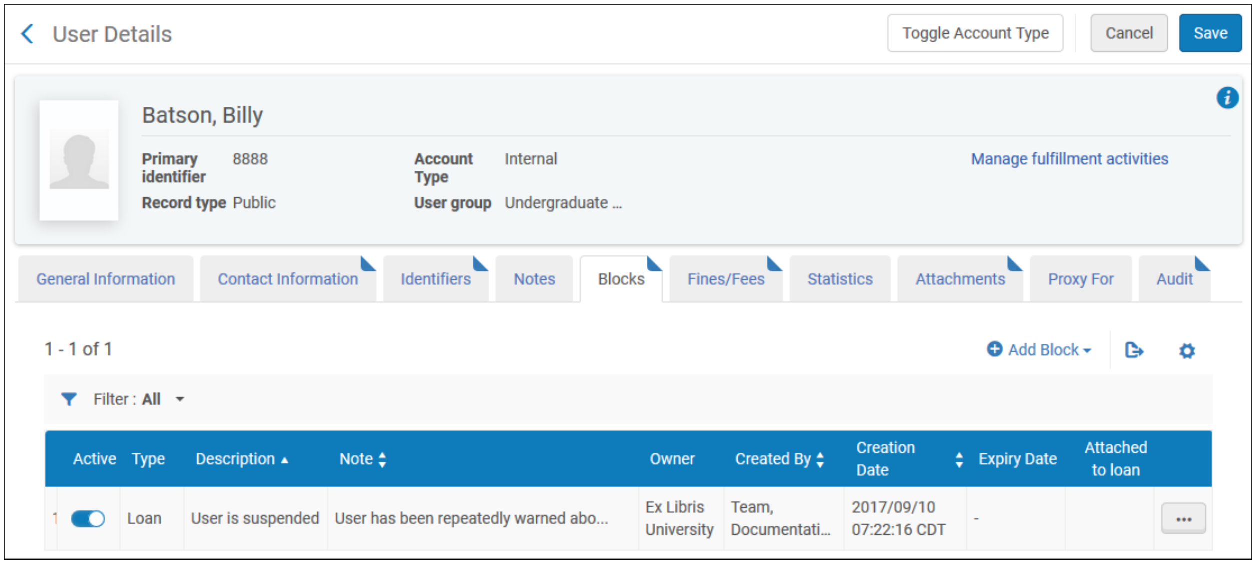
- **Type:** If there are note types in the source system that can be mapped to corresponding Alma note types (such as library, barcode, address), this will be done. Otherwise, all converted notes will have a type of **Library.**
- **User viewable**: If the source system data includes an indication that the note can be viewed by the user, there will be a check mark in this column. Otherwise, there will be no check mark.

8 **Blocks tab:** Since few patrons have blocks, you will need to identify some who do in order to review this data.

If there are blocks in the patron record, there will be a check mark in the Blocks column of the list of patrons.



Open the record for the patron, then open the **Blocks** tab to view the blocks. You may need to select **Edit** from the row actions list to see a complete Note value.



Note: There should be one block in Alma that corresponds to each block in the source system.

In all cases, the record should be marked **Active**.

Type will be **General** in all cases.

Owner may be the institution or a library.

If an end date for the block appears in the source system, this date will be in the **Note** field.

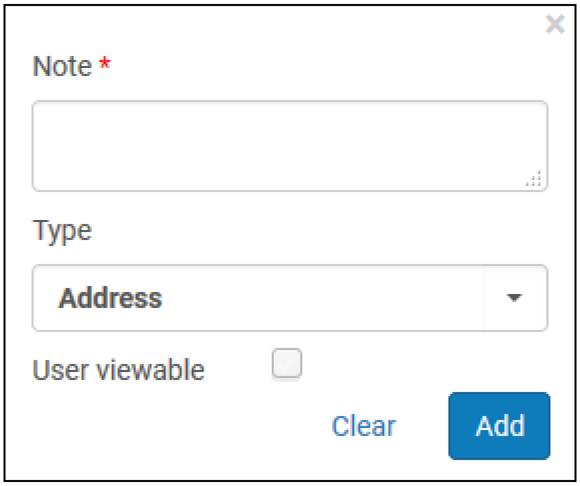
Testing Basic Patron Record Functionality

1 Add data to a patron record.

Open a patron record.

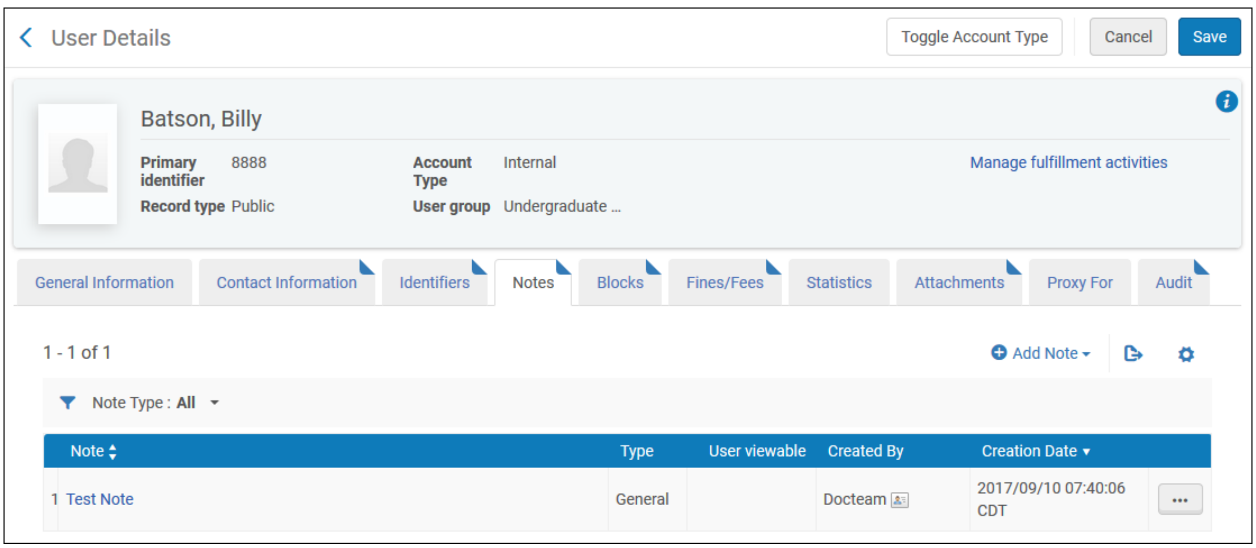
a Open the **Notes** tab of the record.

b Click the **Add Note** button. Type a note in the **Note** box. Select a type from the **Type** drop-down list.



c Click **Add**.

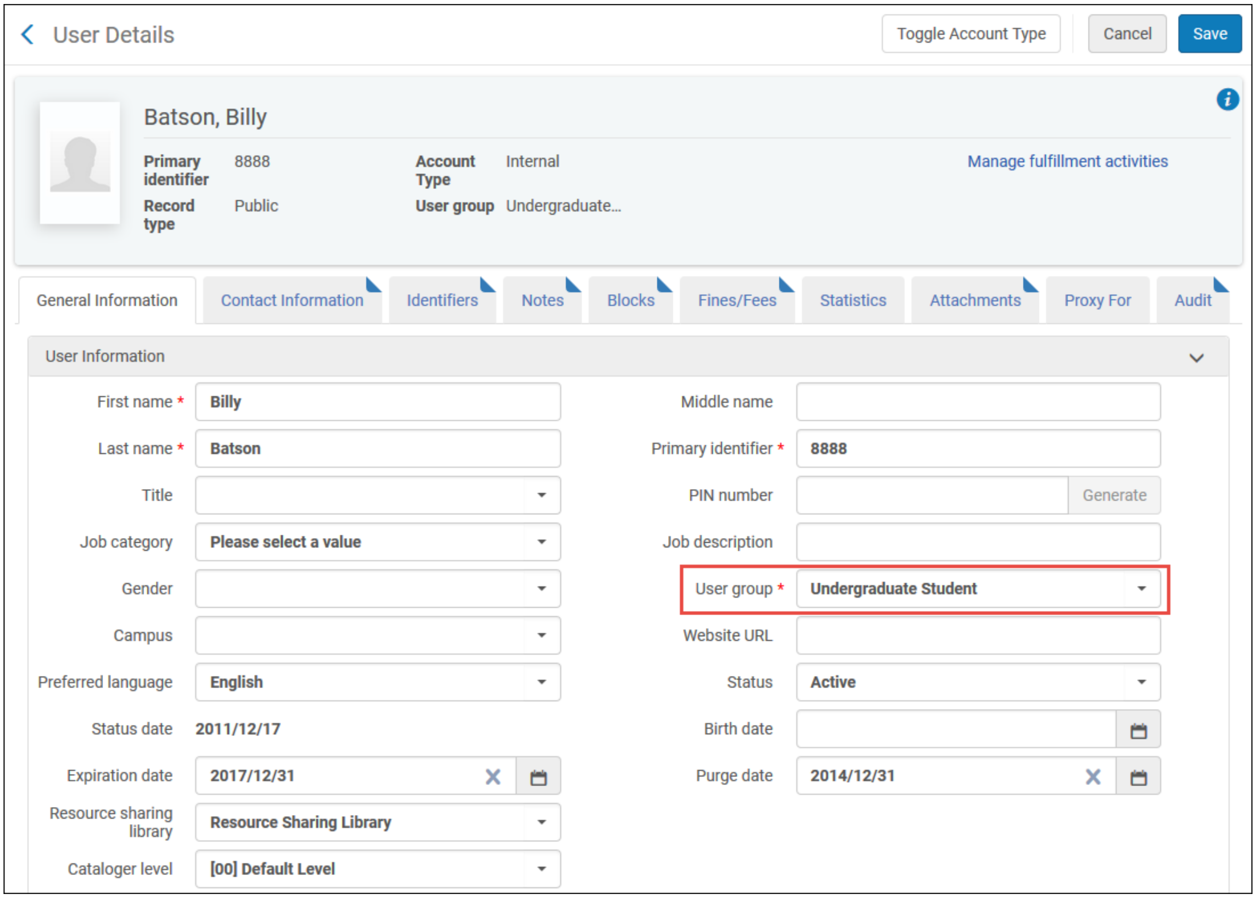
The note you have just added should appear in the list of notes.



2 Edit data in a patron record.

Open the **General Information** tab of a patron record.

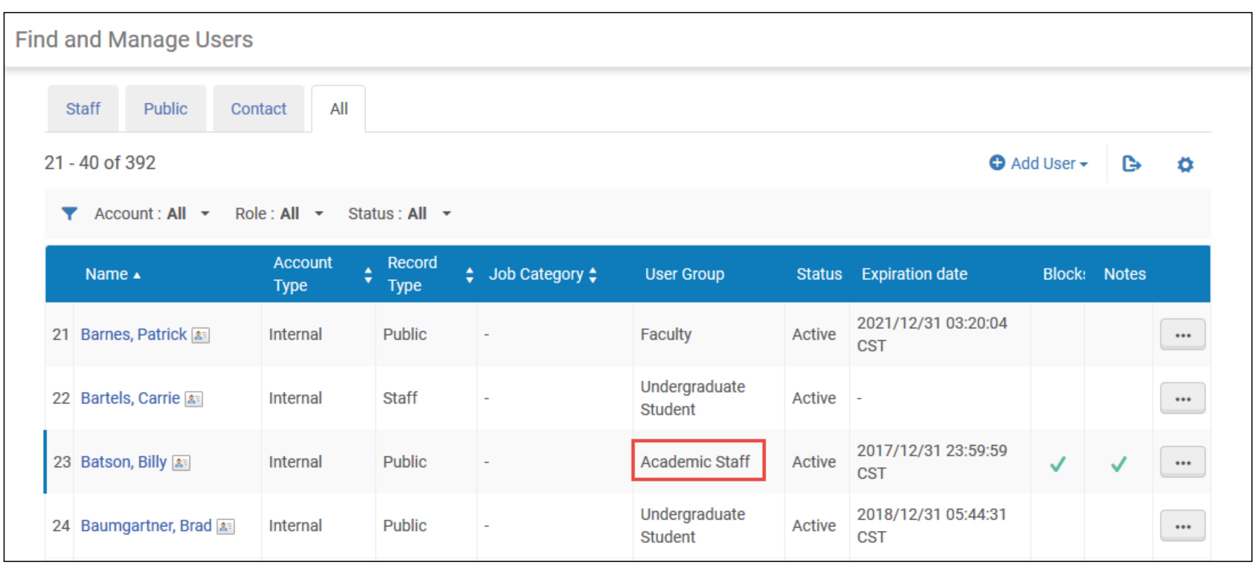
a Write down the **User Group** value for this patron.



b Now select a different user group from the drop-down list.

c Click **Save**.

The user group you have just selected should appear in the User Group column for this patron in the list of patrons.



d Restore the patron's original user group value.

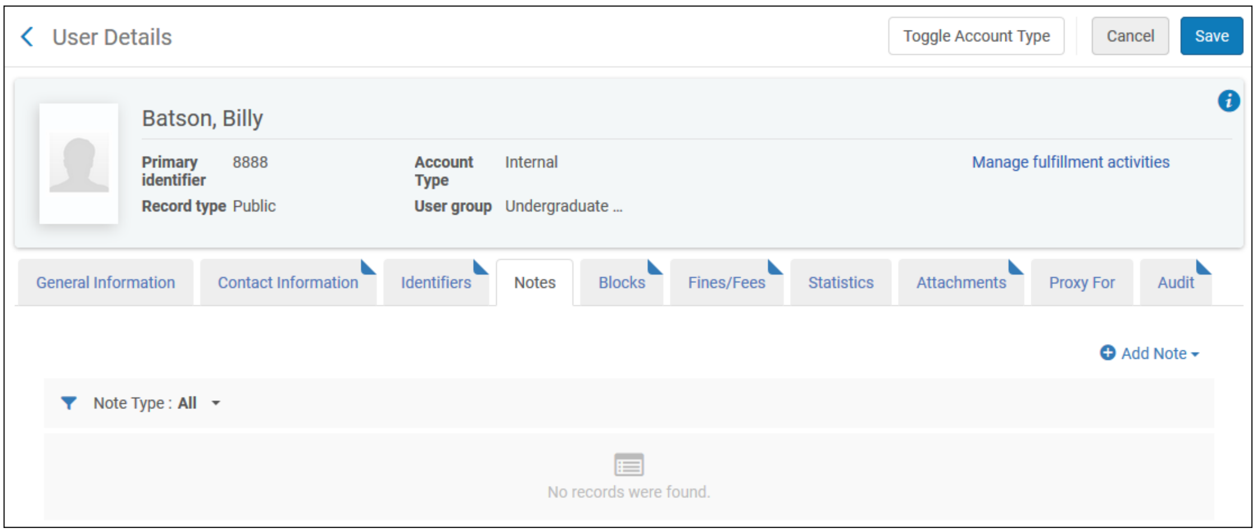
3 Delete data in a patron record.

Open the patron record to which you added a note in step 1.

a Open the **Notes** tab.

b Select **Actions > Delete** for the note you added.

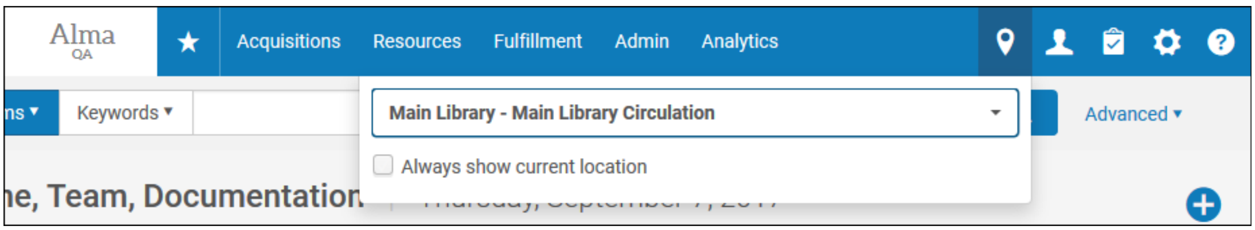
The note should be removed from the list of notes.



4

Loans

Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



For more information on the persistent menu, see [The Alma User Interface](#) in the Customer Knowledge Center.

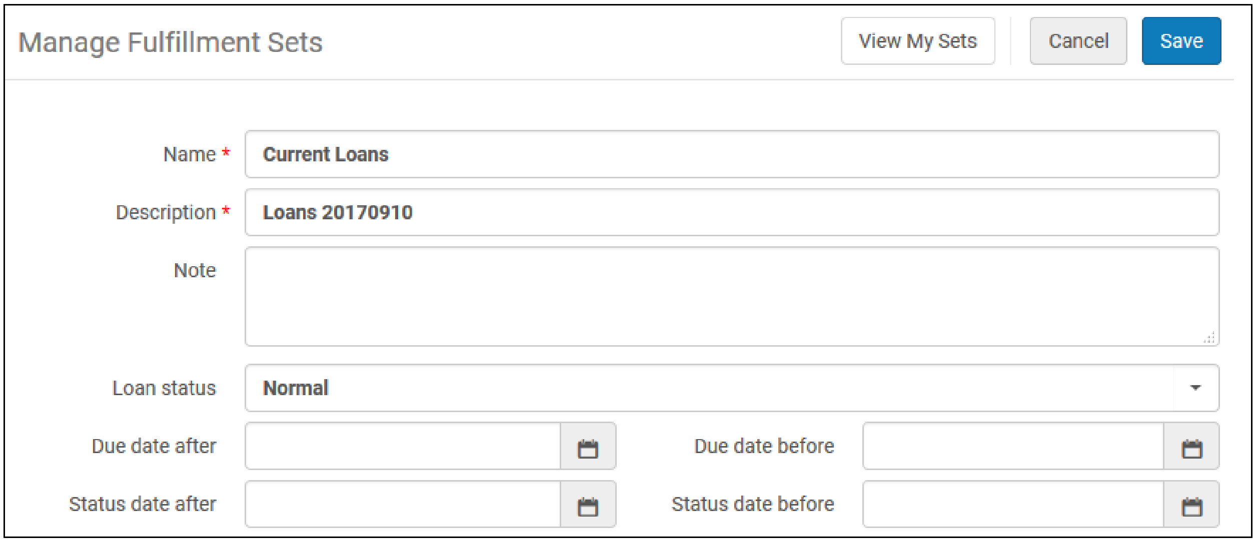
Finding Loans

Note: Only active loans are migrated.

In order to find and review loans, identify patrons that have loans and search for them in any of the ways described above.

Alternatively, you can [create a fulfillment set](#) in order identify active loans. To create a fulfillment set:

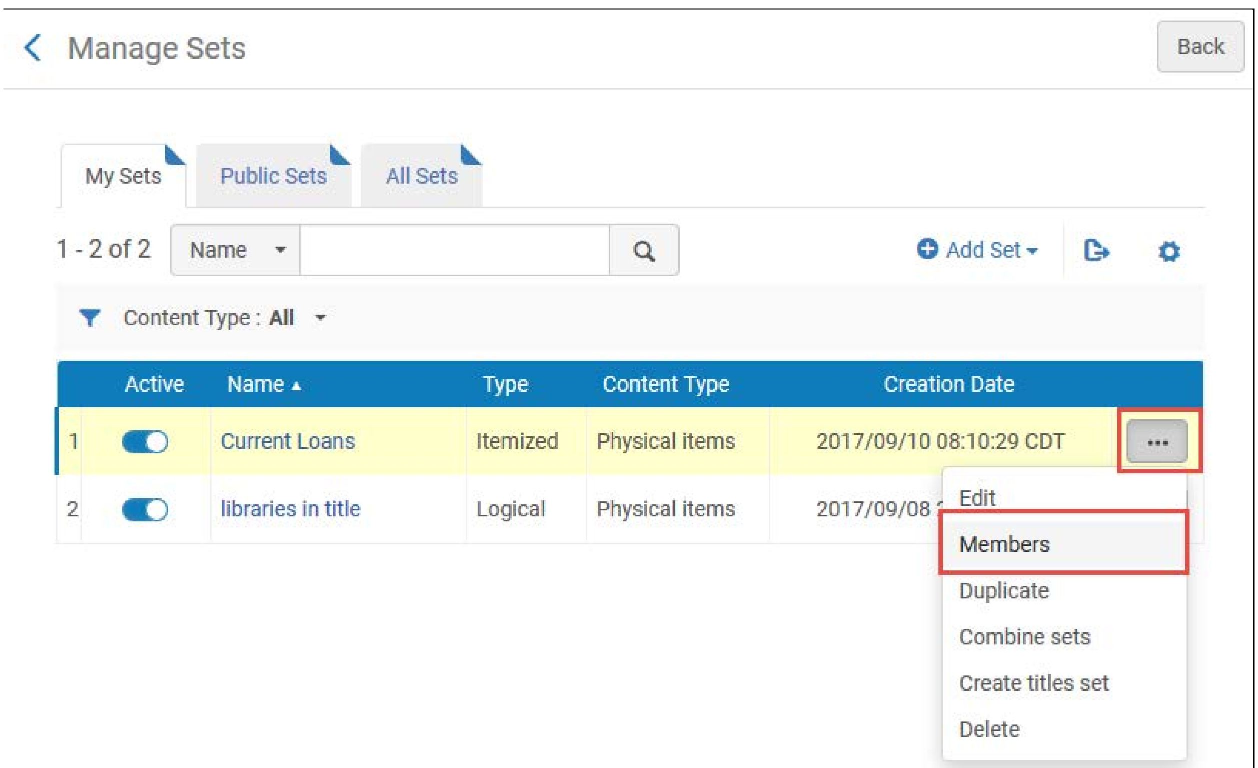
1. In the main Alma menu, navigate to **Fulfillment > Advanced Tools > Create Fulfillment Sets**.
2. Enter a name and description.
3. For the Loan Status field, select **Normal**.



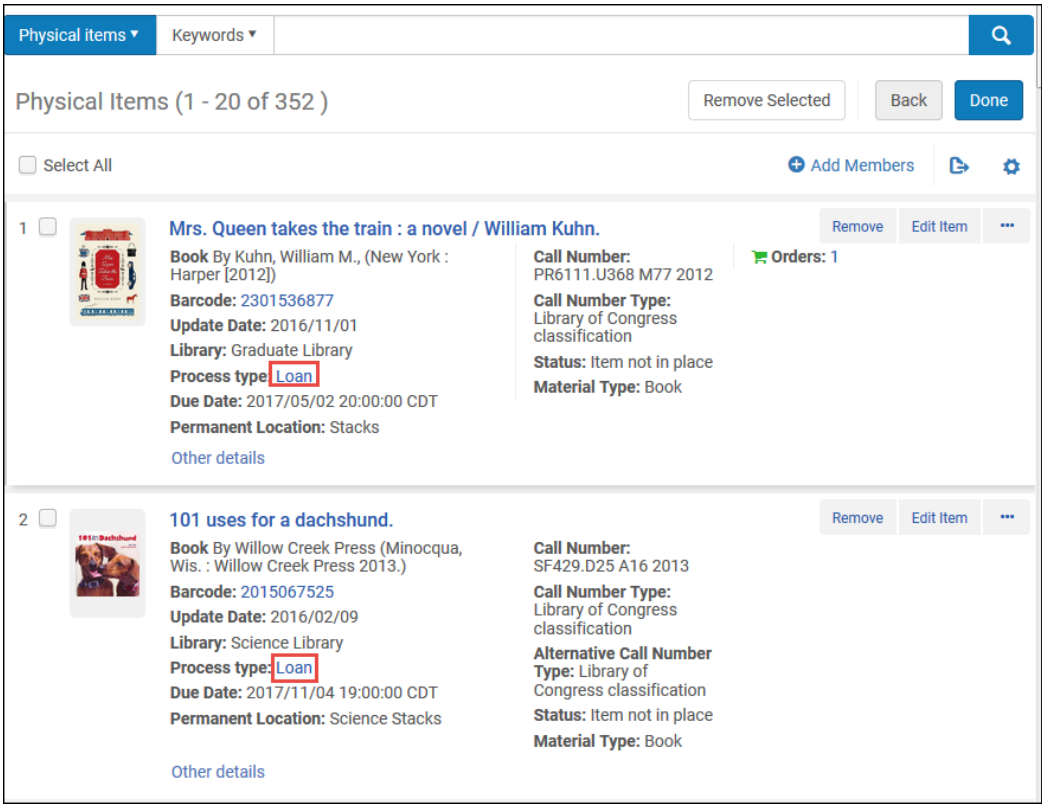
4 Click **Save**.

5 Click **View My Sets**.

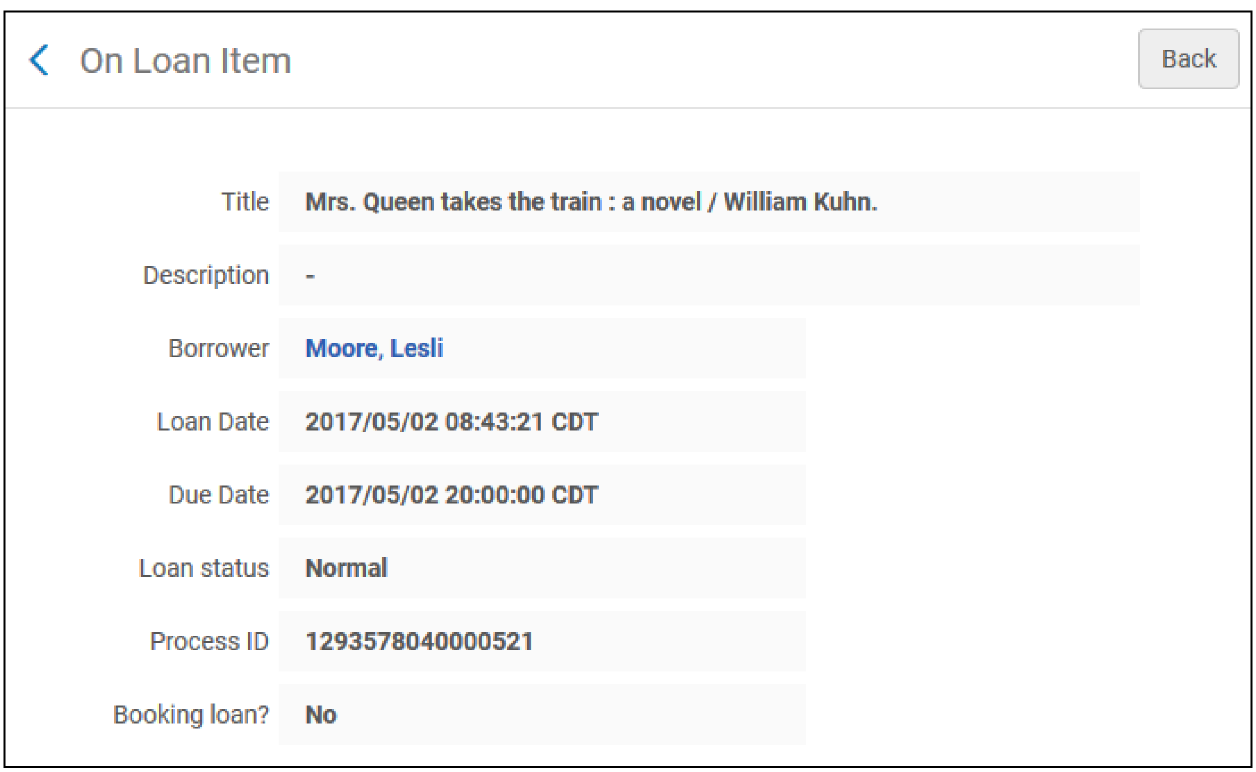
6 Click **Members** from the row actions list of the set you just created.



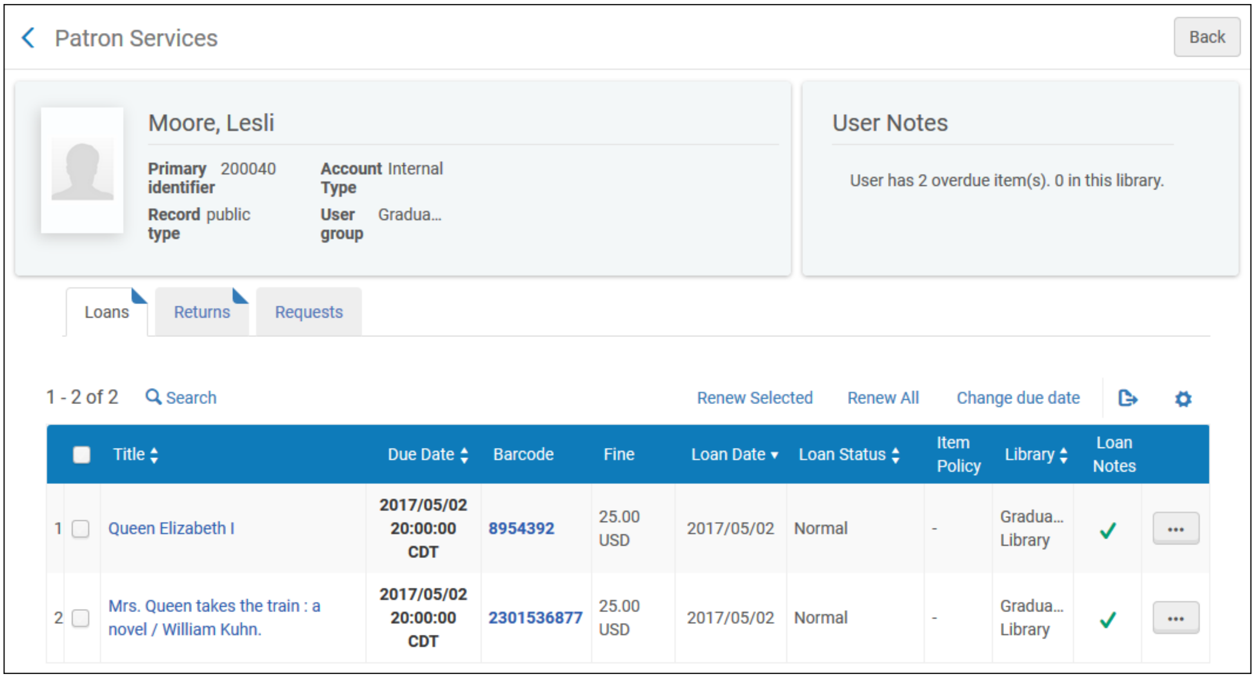
7 In any of the results, click **Loan**.



8 To examine additional loans to this patron, click the borrower name.



A list of the patron's active loans opens. Note that you can sort the list by Title, Due Date, Loan Date, or Loan Status (ascending or descending in all cases).



Reviewing Loans

Review the following loan data for multiple patrons.

Number of Loans

Verify that the patron has the same number of **active** loans in Alma and the source system.

Loaned Item Details

- Verify that the items shown as on loan to the patron in Alma match the items on loan to the patron in the source system.
- Verify that each of the following details for the loaned item is correct.
  - **Barcode**: Note that the barcode links to the item record.
  - **Title**
  - **Item Policy**: This should be the same value as that in the **Item policy** field in the item record.
  - **Library:** This should be the same as the **Temporary library** value in the item record if the item is assigned to a temporary location, or the **Permanent library** value in the item record if it is not in a temporary location.

Loan Details

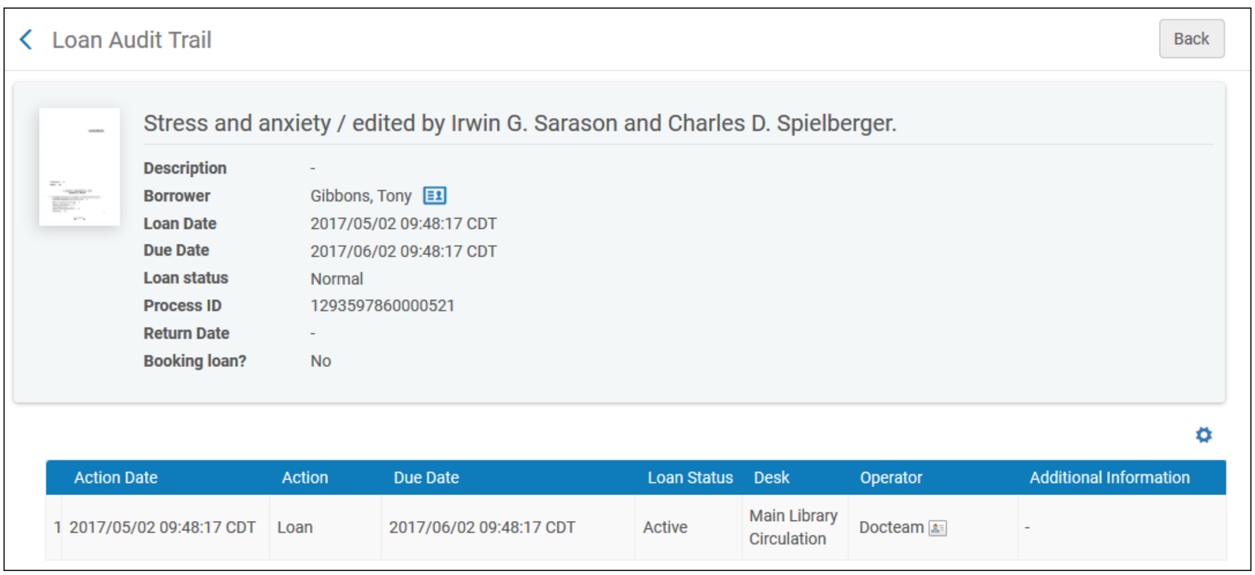
Verify that the following data is correct:

- Due date and time
- Loan date
- Loan status: Possible values are Normal, Renewed, Lost, Claim Returned.
- Fine: Note that if there are multiple fines for the same item, such as a lost item replacement fee plus a lost item processing fee, this value should be the total of all fines associated with the item.

Note: The value of accruing fines (for example, overdue fines for open loans) will likely differ from those in the source system. This is because the proper fine amounts had not yet been configured in Alma at the time of your test load migration. This issue should be largely resolved in the cutover migration.

Loan Audit Trail

To open the Loan Audit Trail display, click the title link in the list of loans, or select **Loan History** from the row actions list.



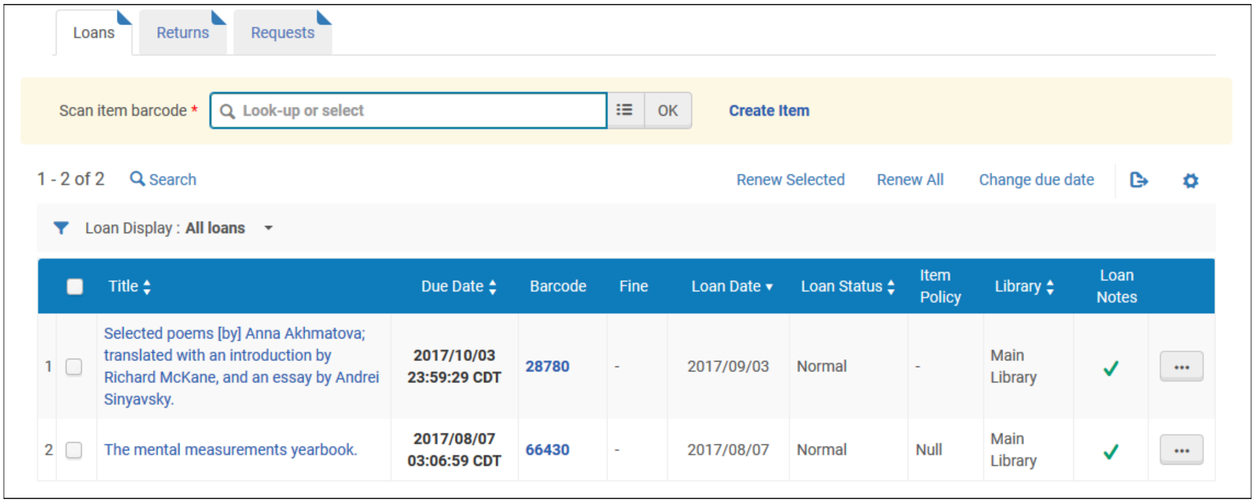
The types of transactions that appear in the Loan Audit Trail will depend on what data is available in the source system.

Verify the accuracy of the information in each audit transaction.

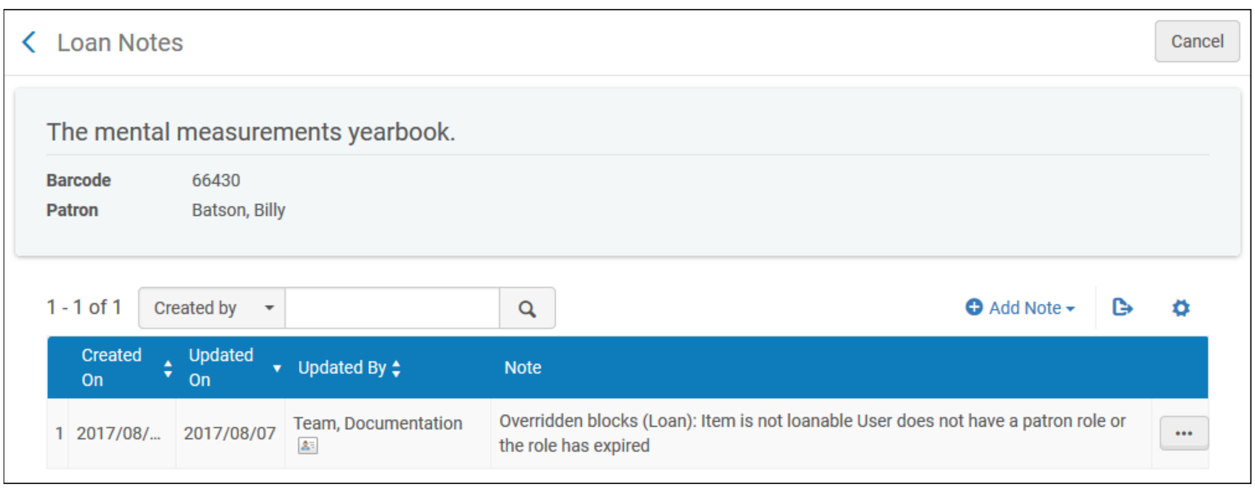
Click **Back** to return to the list of loans.

Loan Notes

If there is a note associated with a loan, there will be a checkmark in the Loan Notes column in the list of loans.



To view the note(s), select **View Notes** from the row actions list.



Verify the accuracy of the converted data.

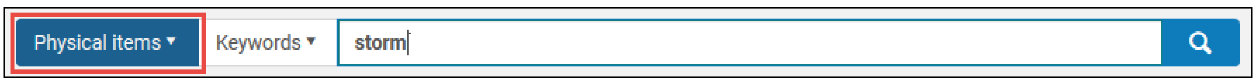
Note: Additional information—for example, a count of the number of times the loan has been renewed—may be migrated to the notes.

Testing Basic Loan Functionality

Note: Loaning an item requires having first supplied your fulfillment policy preferences to your Ex Libris Project Manager in the Ex Libris configuration form. Test loaning an item according to each of the rows in the Policies, TOU and Rules tab—that is, for each combination of item Location Type and Patron Type, or Item Exception Type.

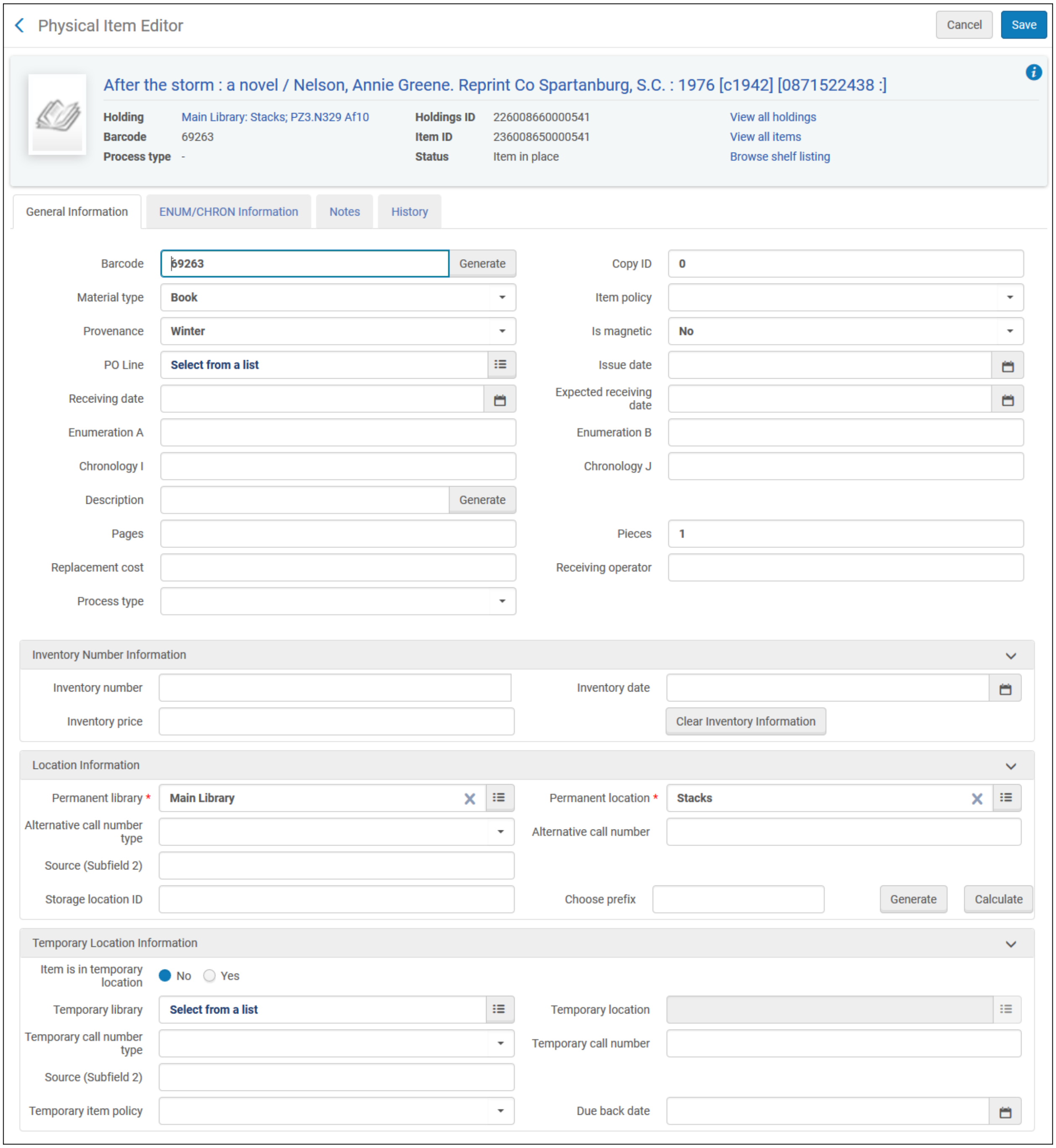
1 Find an item to check out.

   a Identify an item that can be checked out. From the persistent search box, select Physical Items and enter your keyword.

   For more information on the search box, see Searching in Alma in the Customer Knowledge Center.

   b From the Physical Items list, select **Items** from the row actions list for the selected item.

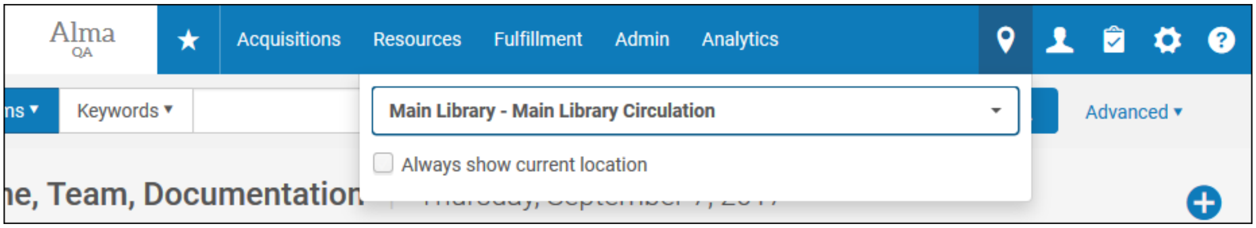


The item should be from a circulating collection that has a typical loan period. Record the item barcode and the owning library.

2 Check out an item to a patron.

a Log on to Alma as a user who has a Circulation Desk Operator role **for the library that owns the item selected in step 1**.

b If necessary, change your location to a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.

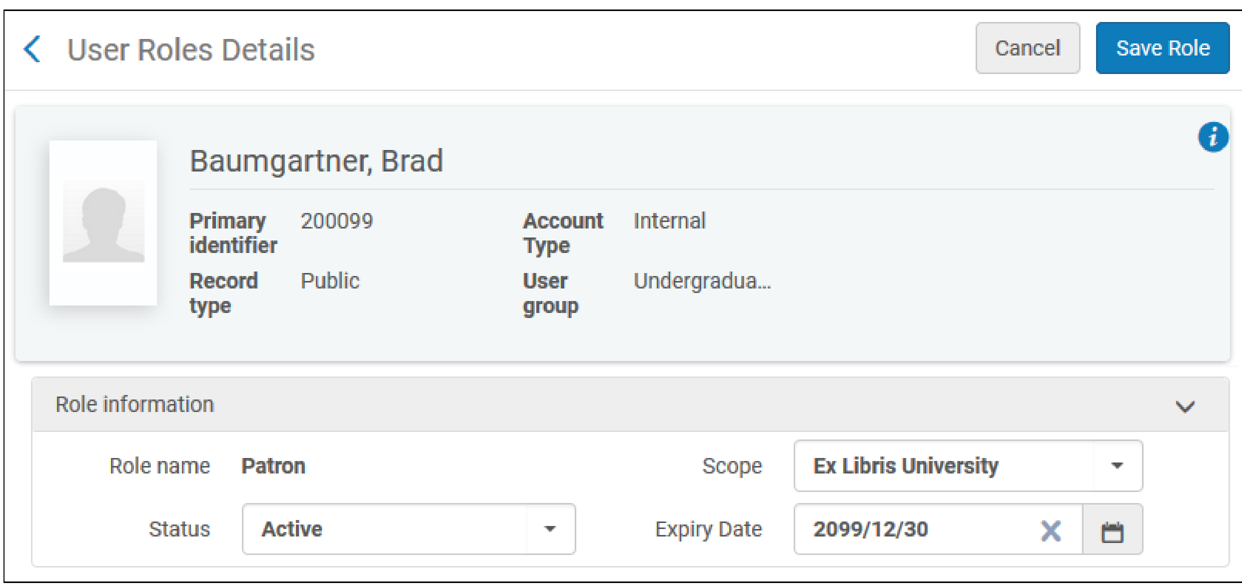


For more information on the persistent menu, see [The Alma User Interface]() in the Customer Knowledge Center.

c Identify a patron to whom you will check out an item. Make certain he or she has a **Patron Role** with a relevant **Scope**, an **Active** status, and an **Expiration Date** that has not passed. Record the patron's ID.

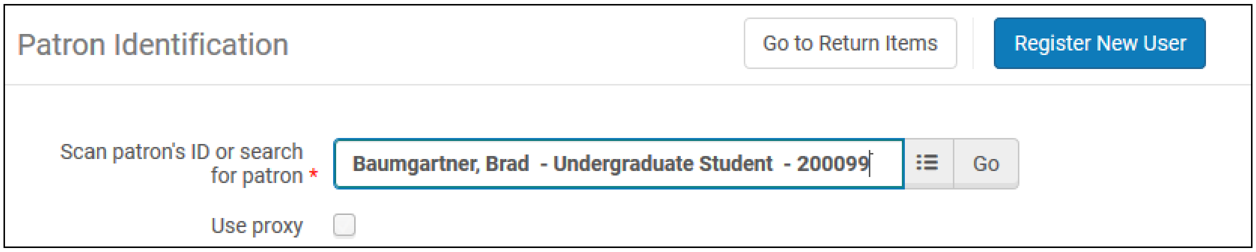
   a. To verify the user role details, open the General Information tab for an individual patron record. If you are starting from a list of patrons, either click the name link or select **Edit** from the row actions list.

   b. At the bottom of the page, click the role name, or select **Edit** from the row actions list. On this page, you can view the Status and Expiry date for the role.



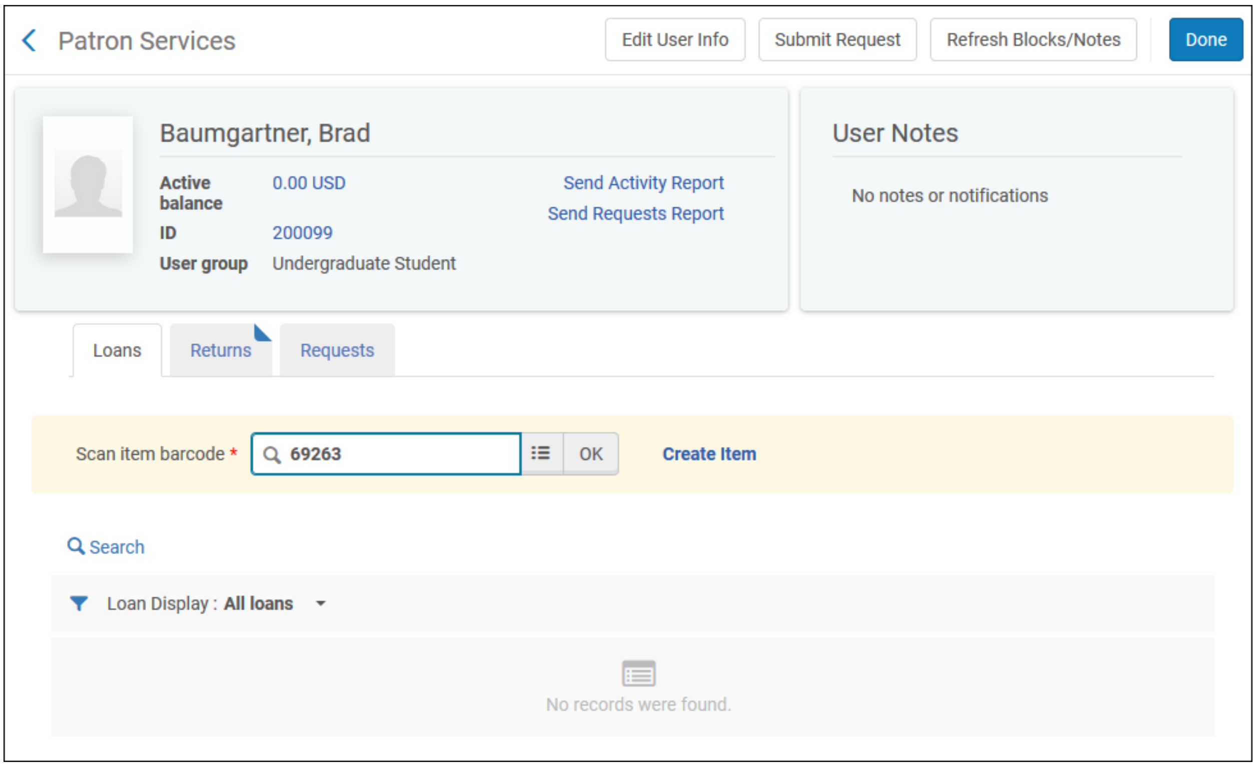
d On the Alma main menu, go to **Fulfillment > Checkout/Checkin** and select **Manage Patron Services.**

e Enter the patron ID in the **Scan patron's ID** box.



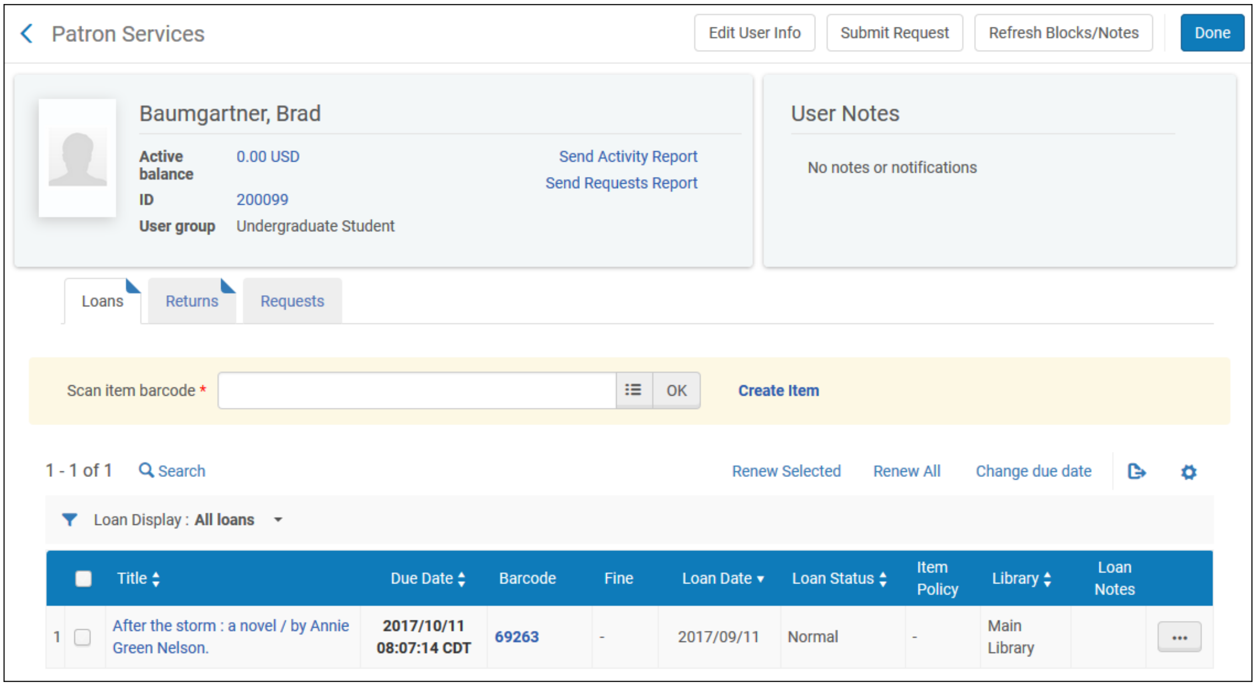
f Click **Go** or press **Enter**.

g Enter the item barcode in the **Scan item barcode** box.



h Click **OK** or press **Enter**.

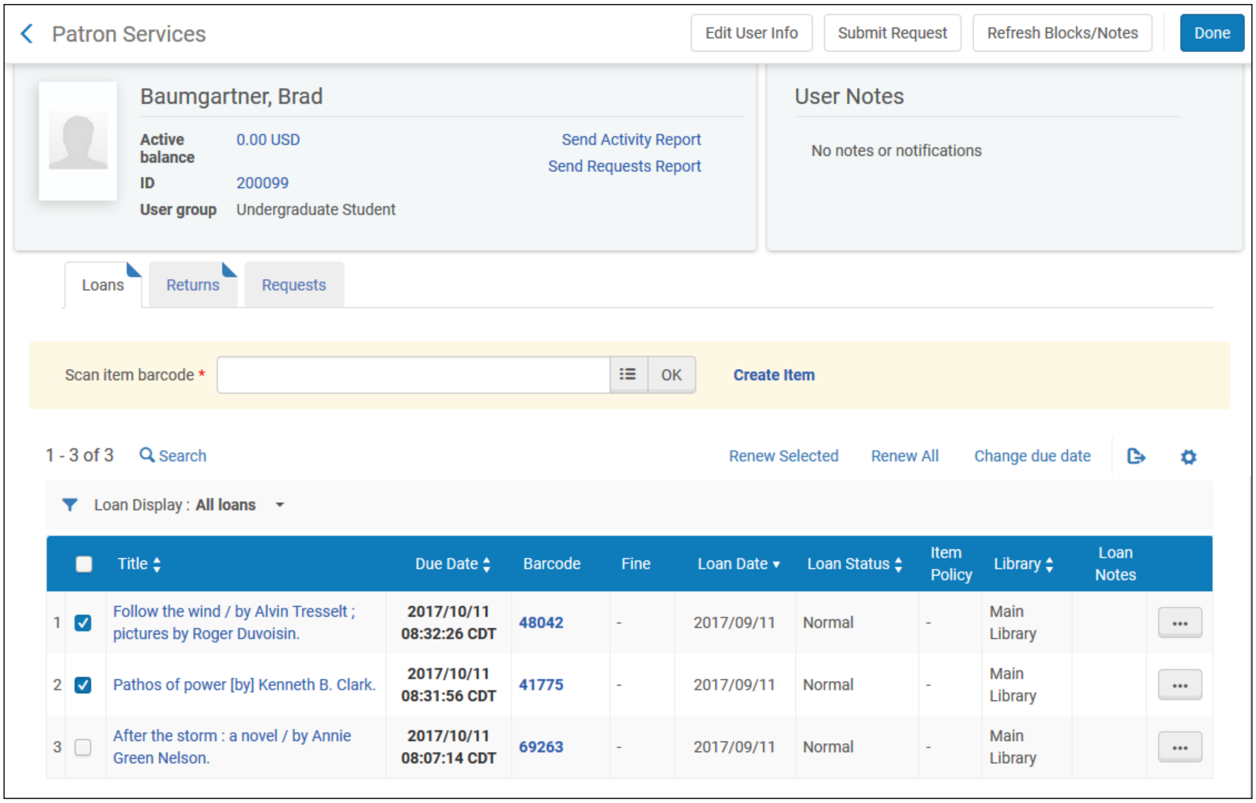
The loan information should now appear in the list of loans for this session.



3 Renew a loan.

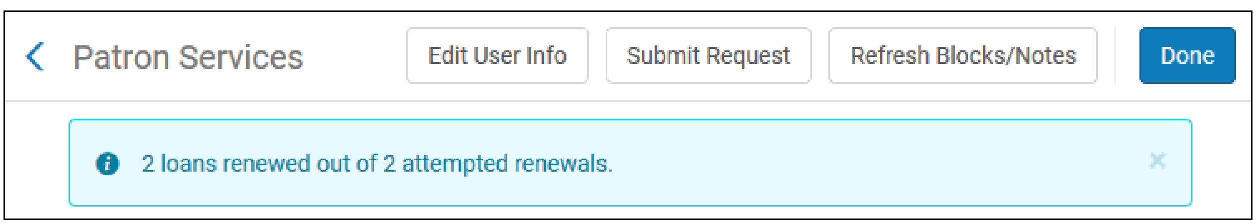
a Select Loan Display=All to open the list of a patron's loans.

b Select the check box at the beginning of the line for two or three loans.



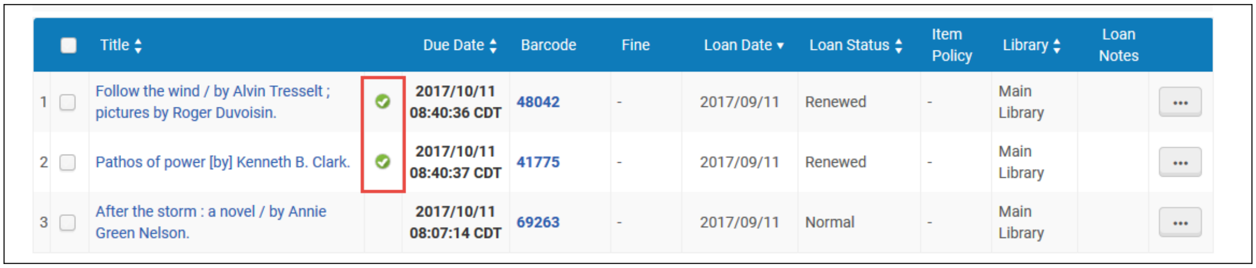
c Click the **Renew Selected** button.

You should get a message at the top of the page stating that the renewal was successful or that it could not be performed.

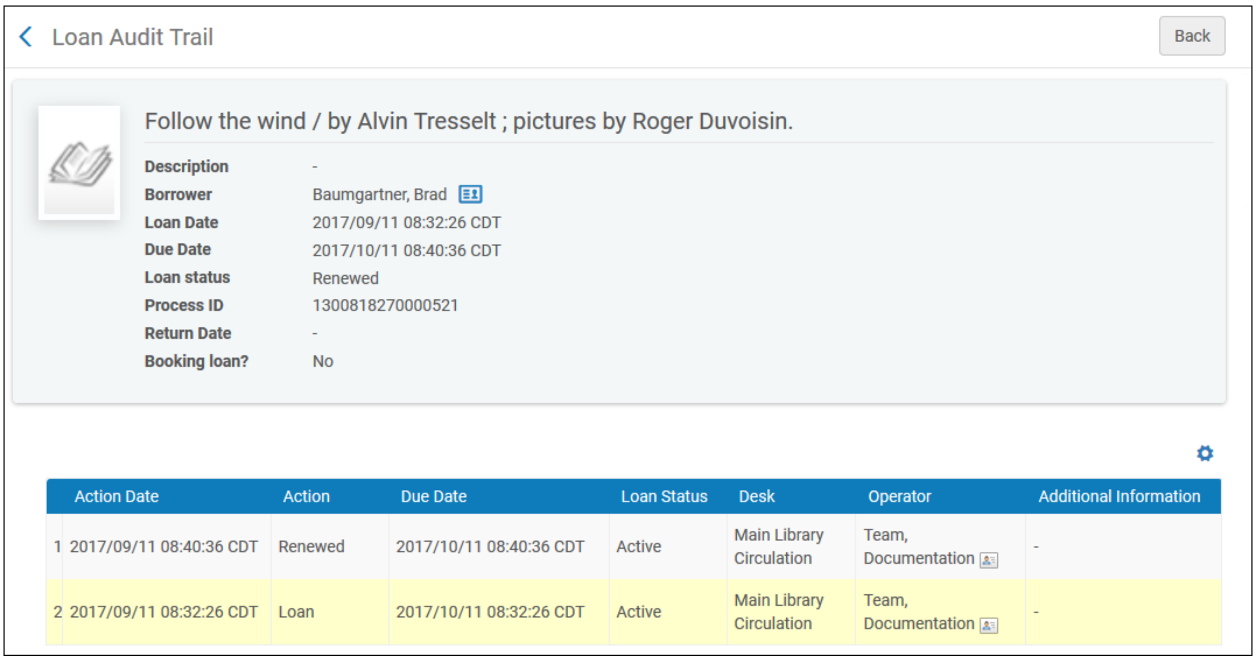


If the renewal was successful, the due date should have changed (unless the loan was just created). The new due date will depend on fulfillment setup.

A new, unlabeled column will appear in the list of loans just after the Title column. For the renewed items, this column will have a check mark in a green circle. This indicates that a Loan Audit transaction was written.



To see this transaction, select **Loan History** from the row actions list.



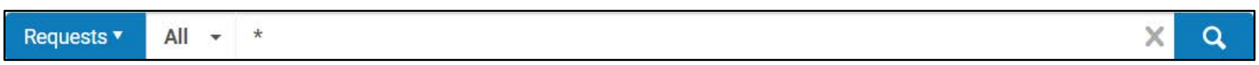
5

Hold Requests

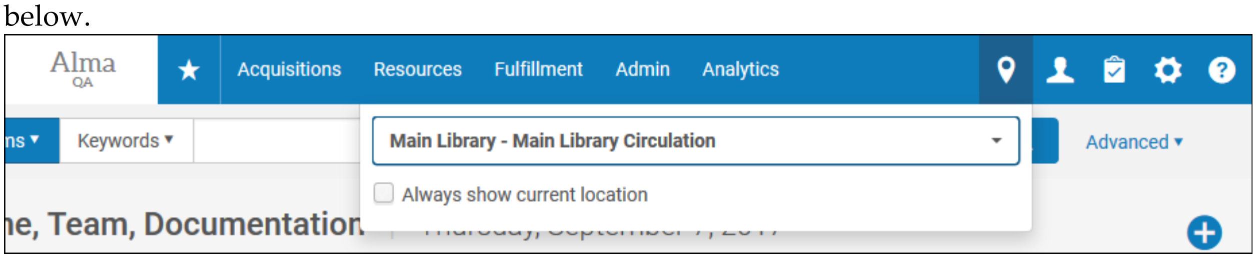
Only hold requests that are waiting on the hold shelf for patron pickup are migrated.

Finding Hold Requests

On the persistent menu bar, search Requests where All = *. Any hold requests that were migrated are displayed. (Note that these results may no longer reflect active hold requests in your source system, as a significant amount of time may have passed since your data was extracted from your source system).



Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.

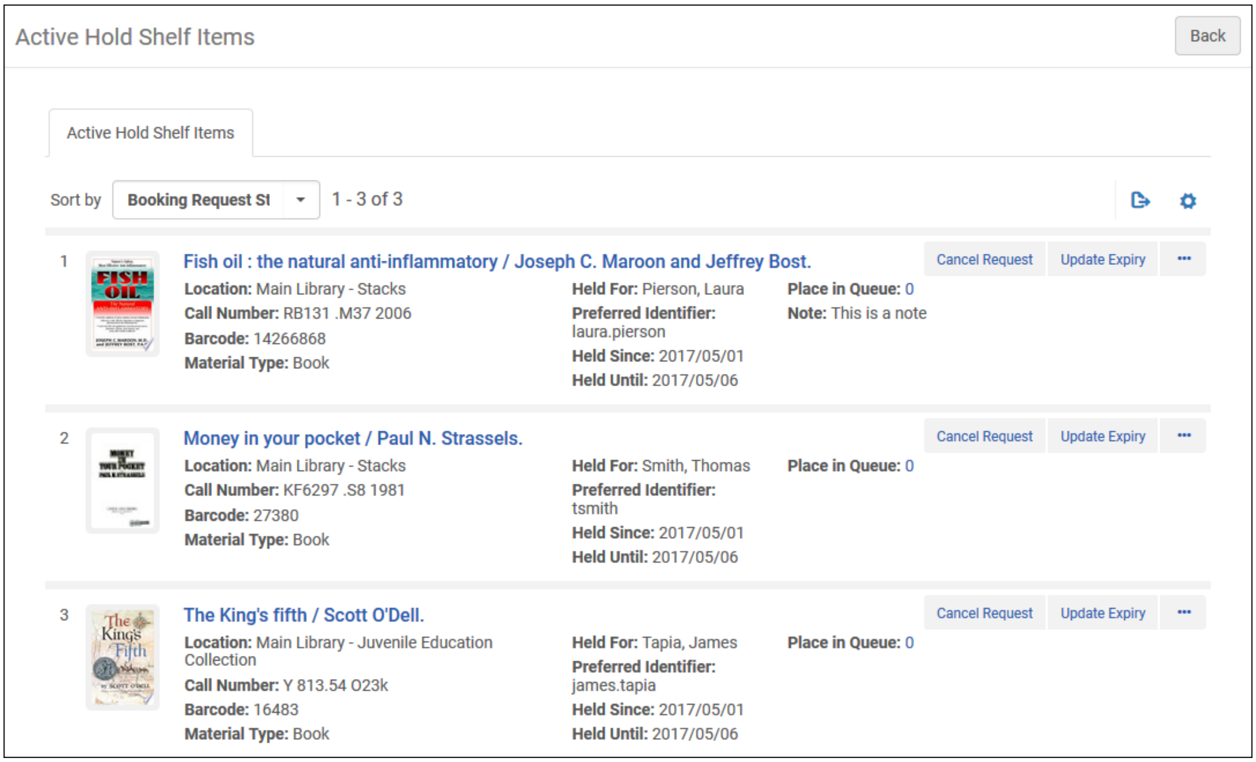


For more information on the persistent menu, see [The Alma User Interface]() in the Customer Knowledge Center.

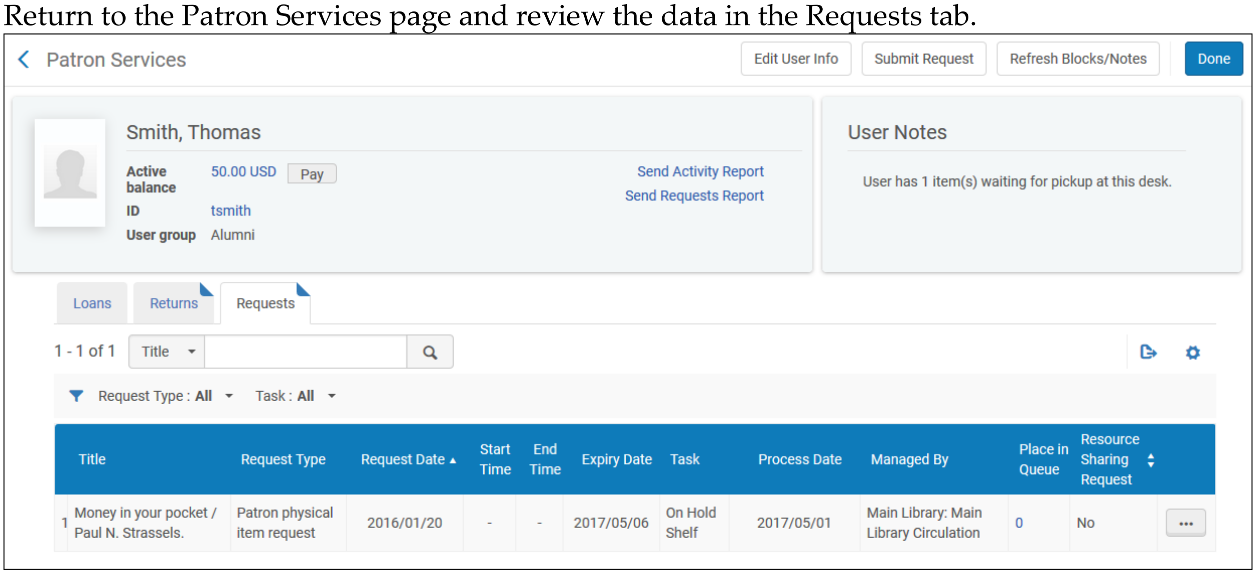
1. Open the **Patron Services** page (Fulfillment > Checkout/Checkin > Manage Patron Services) for an individual patron that has items on the hold shelf, using any of the methods for finding a patron described in the section on Patron Records above.
2. Open the **Requests** tab to see a list of hold requests. Note that you can sort the list by Request Date. You can also search for a request in the list by entering a title keyword in the **Find** box.

Reviewing Hold Requests

1 Go to **Fulfillment > Resource Requests > Active Hold Shelf** and verify that the requests you examined above appear in the hold shelf in Alma. (Verify that your **Currently at** location is the same as the **Managed By Desk** of the request).



2 Return to the Patron Services page and review the data in the Requests tab.

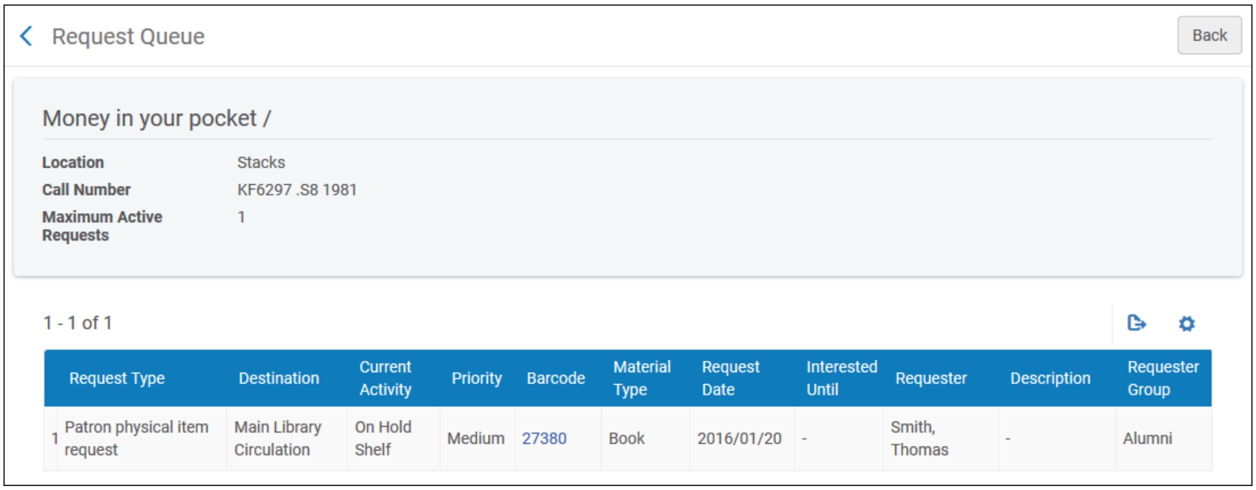


- **Request Type** should be **Patron physical item request** in all cases.

- **Request Date:** Verify the accuracy of this date.
- **Task** should be **On Hold Shelf** in all cases.
- **Process Date:** Verify that this is the date the item was placed on the hold shelf.
- **Managed by:** This should be the library and desk where the hold shelf is and should be based on Pickup Location.

3 Review data on the Request Queue page.

Click the number in the **Place in Queue** column (above) to open this page.



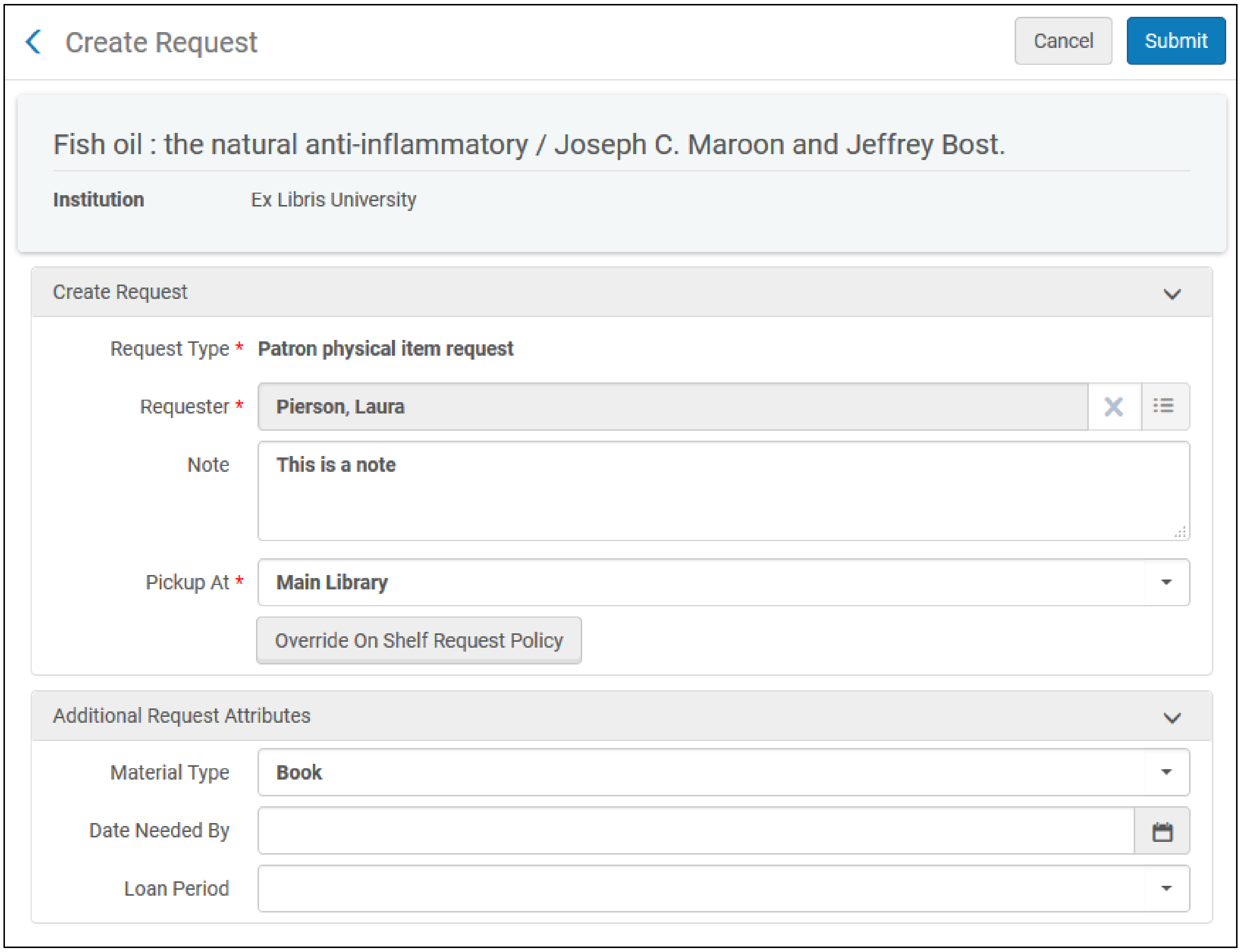
Additional data on this page includes:

- **Priority**: This will always be **High** in migrated records.
- **Barcode**: The barcode is a link to the item record. Using these links is the best way to verify that the items in the patron's hold list are the same in Alma and the source system.
- **Call Number and Material Type**: These values should be the same as those in the item record.

Click the back button to return to the request.

4 Review notes associated with the hold request on the Create Request page.

From the Active Hold Shelf page, click the title's link to open the Create Request page.



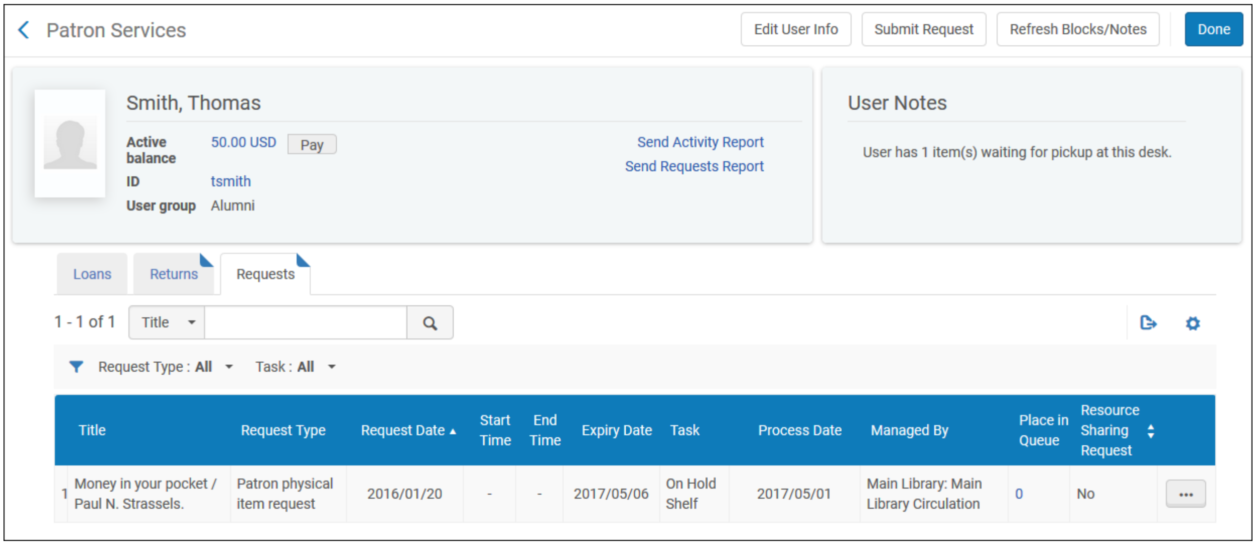
d Verify that notes have been migrated correctly.

Note: For items on the hold shelf, the **Date Needed By** values in the source system are not converted, since they are irrelevant once the item is on the hold shelf.

Testing Basic Hold Request Functionality

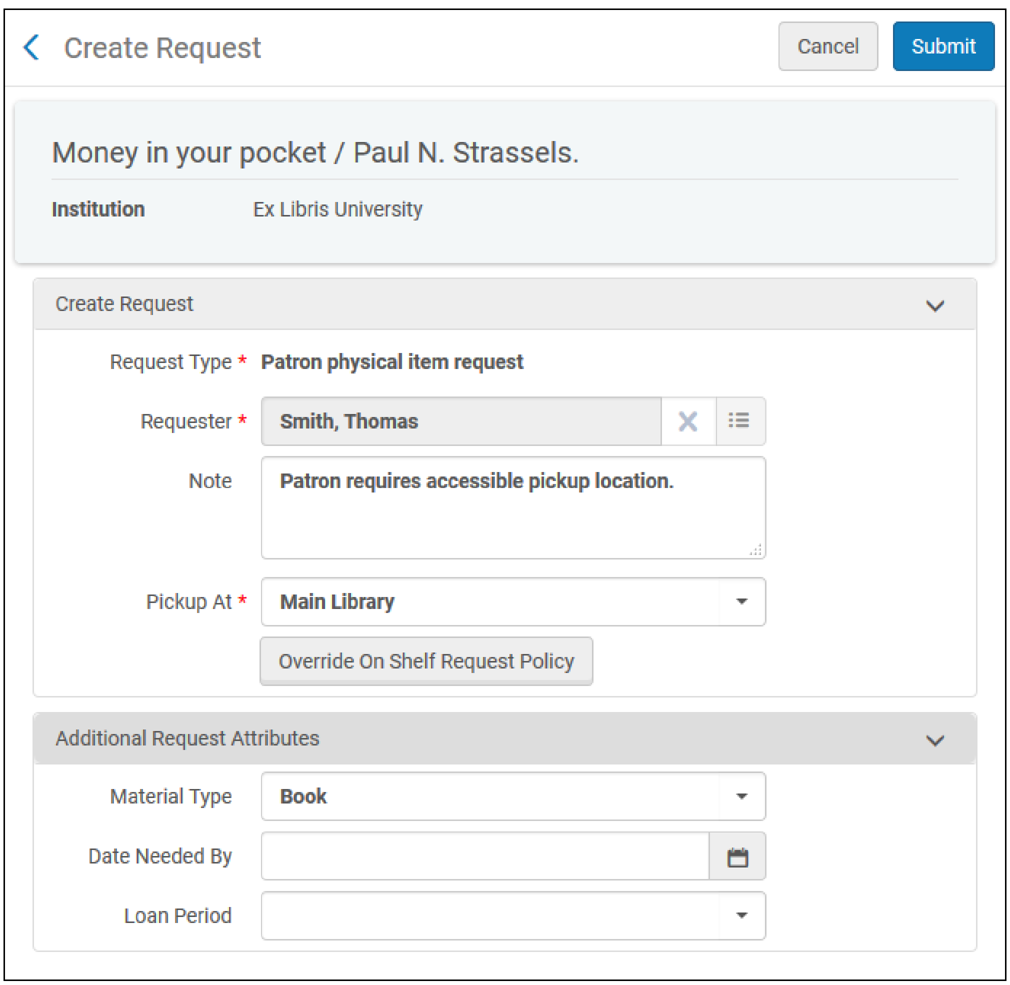
1 Add a note to a hold request.

Open the display of the list of a patron's hold requests.



a Select **Edit** from the row actions list to open the Create Request page.

b Type a note in the **Note** field.



c Click **Submit**.

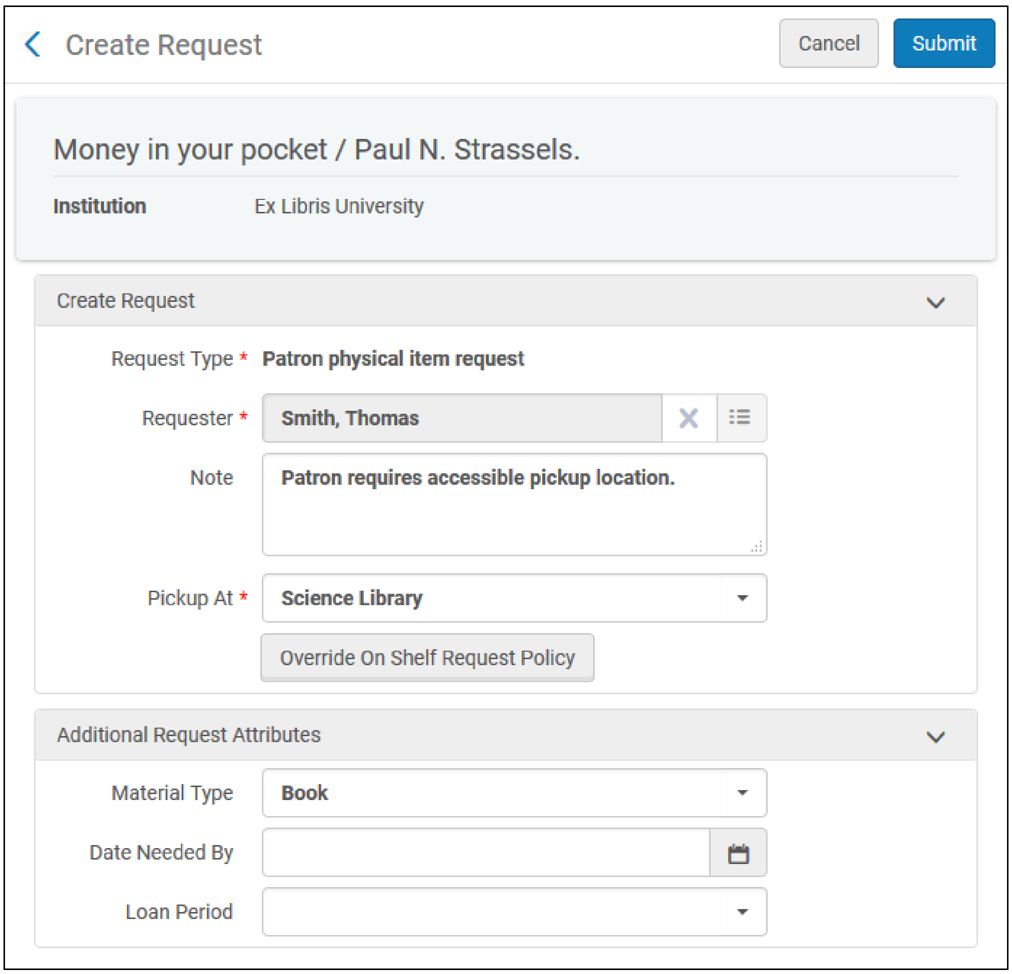
The Patron Services page opens with a message indicating that the update was successful.

2 Edit the pickup location for a hold request.

Open the display of the list of a patron's hold requests.

a Select **Edit** from the row actions list to open the Create Request page.

b Select a different value from the **Pickup at** drop-down list.



c Click **Submit.**

The Patron Services page opens with a message that the hold request has been updated.

3 Delete a note from a hold request.

Open the list of hold requests you opened in Step 1.

a Open the Create Request page for the record to which you added a note.

b Delete the note.

c. Click **Submit**.

The Patron Services page opens to the list of hold requests. A message displays indicating that the request was updated.

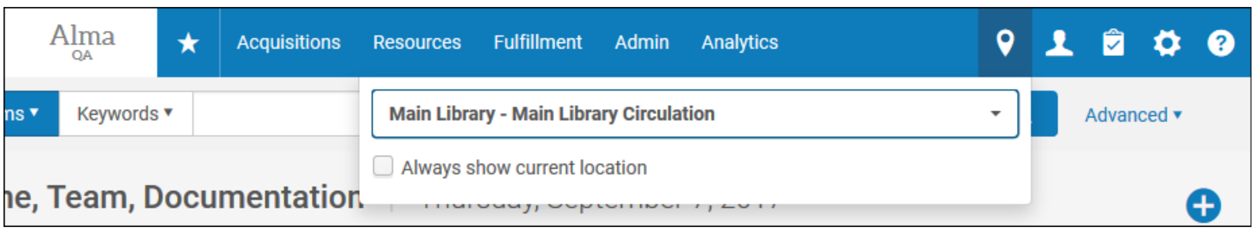
Testing Hold Request Scenarios

Attempt to create a patron physical item request (=hold request) for each of the scenarios defined in your configuration form. That is, for each row in the Policies, TOU and Rules tab – for each combination of item Location Type and Patron Type and/or Item Exception Policy – attempt to create a hold request. Verify the results by examining the applicable Request TOU via Fulfillment > Advanced Tools > Fulfillment Configuration Utility > Request.

6

Fines and Fees

Ensure that you are currently at a circulation desk: on the persistent menu, click the library/desk selector to get a drop-down list of possible values. Select a circulation desk such as the one below.



For more information on the persistent menu, see [The Alma User Interface]() in the Customer Knowledge Center.

Finding Fines and Fees Transactions

Identify patrons that have Fines or Fees in the source system in order to conduct your review.

There are two ways of opening a list of **Fines and Fees** for review.

1. Search for a patron record as instructed above, using **Manage Users** or the persistent search box. Then open the patron record and click the **Fines and Fees** tab.
2. Select **Manage Patron Services**, and enter a Barcode or a Patron Name as instructed above. Then click the **Active Balance** link in the brief patron record.
   The Fines and Fees tab opens in the full patron record.

Note: The list opens with the default fine/fee type **All** and status **Active**. You also can filter the list by multiple fine/fee types, or by status: **Active**, **Closed**, **In Dispute**, or **All**.

You can sort the list by Creation Date, Fine/Fee Type, Status, Fee Owner or Title.

You can search for a specific fine/fee by title of the item, the library that assessed the fine, or transaction ID.

Overdue fines are not applied to the patron's account until the loan is closed (e.g. the item is returned). The current amount of such fines is displayed in the Patron Services page, but is not included in the Fines/Fees tab of the user record. Such fines may differ in value from those in the source system since the proper overdue fine policies had not yet been configured in Alma at the time of your test load migration. This difference should be largely resolved during the cutover migration.

Reviewing Fines and Fees

1. Verify that the patron's active balance is correct.
2. Verify that the patron has the same number of open fines/fees in Alma as in the source system. Select fine/fee type **All** and status **All** to display the total number. Note that in some source systems there may be multiple transactions for the same fine/fee, especially if it was partially, but not fully, paid. In Alma, there will be only one fine/fee record in these cases.
3. Verify that fines/fees are for the same items in Alma and the source system in cases where the fine/fee is associated with an item.
4. Review the following details. Be sure to review fines/fees with all relevant types and statuses.
    - **Creation Date**: Verify that this date matches the date in the source system.
    - **Fine/Fee type**: Verify that source system types have been mapped correctly to Alma types.
    - **Status**: Verify that source system statuses have been mapped correctly to the Alma statuses Active or In Dispute. (Closed fines/fees are not migrated).
    - **Comment**: Any data in the source system that provides further information about the transaction, such as notes or descriptions, should be copied to this field.
    - **Fee Owner:** This should be the library that assessed the fine/fee, which will be the library that owns the item when the fine/fee is associated with an item – that is, when there is a value in the Title column. If the owning library in the source system does not exist in Alma, the Fee Owner will be the Institution.
    - **Title**: This is the title of the item for which the fine/fee was assessed, if the fine/fee is associated with an item.
    - **Original Amount** and **Remaining Balance**
        - For a fine/fee with a status of **Active**, Original Amount and Remaining Balance in migrated data should be the same.
        - For a fine/fee with a status of **Closed**, the Original Amount should be the amount paid or waived, and the Remaining Balance should be 0.00.

Note: For most incoming library systems, if a fine/fee has been partially but not fully paid in the source system, only the amount still owed will be migrated to Alma as an active fine/fee. Transaction details are typically not migrated.

5 Voyager only: Review transaction details for partially paid fines/fees.

- Click the **Remaining Balance** link to open a list of transaction details for the fine/fee. (Note that if the Original Amount and Remaining Balance values are equal, no records will be found when you click the Remaining Balance link.)
- Verify that the following transaction data is correct.
  - **Transaction Type:** Possible values are Paid, Waive, or Transfer. Verify that source system values have been mapped to the appropriate Alma value.
  - **Amount**
  - **Transaction Date**

Note: Payment Method will not be converted.

Testing Basic Fines and Fees Functionality

1 Add a fine/fee.

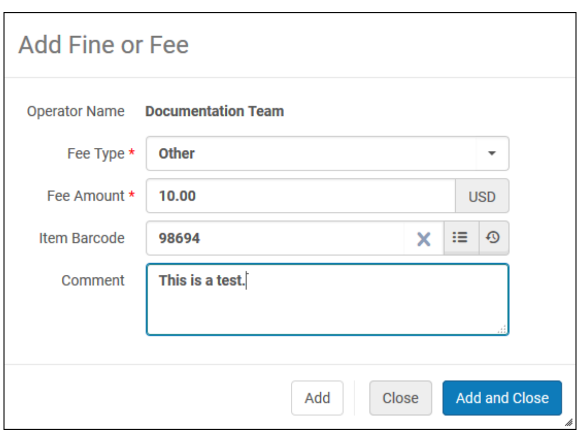
Open a patron record, then open the **Fines and Fees** tab.

a Write down the patron's active balance.

b Sort the list of fines by descending Creation Date.

c Click the **Add Fine or Fee** button.

d In the pop-up window, select **Other** as the fee type, enter a **Fee amount**, enter a barcode, if desired, and enter a **Note** indicating this is a test transaction.



e Click **Add and Close**.

The patron's **Active Balance** should be **incremented** by the amount of the fee you just entered, the fee should appear at the top of the list of fines/fees with a fine/fee type of **Other,** and the **Remaining Balance** for this fine/fee should equal the amount you entered.

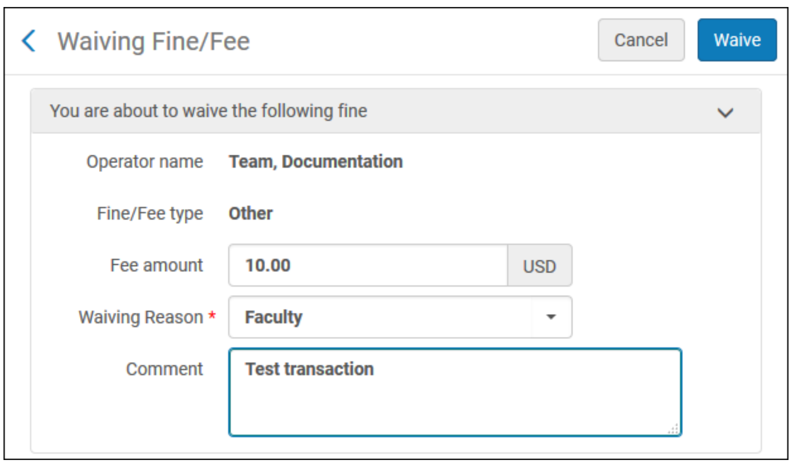
2 Waive a fine/fee.

Open the same patron record to which you just added the fine/fee, then open the **Fines and Fees** tab.

a Identify the fine/fee you just entered in the list.

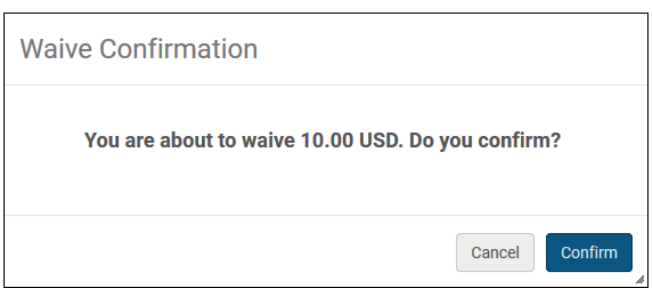
b Select **Waive** from the row actions list.

c On the Waiving Fine/Fee page, select **Other** as the waiving reason, and add a note indicating this is a test transaction.



d Click the **Waive** button.

e Click the **Confirm** button in the confirmation box.



The patron's **Active Balance** should be **decremented** by the amount of the fee you just waived, the status of the fine/fee should be **Closed**, and the Remaining Balance for the fine/fee should be **0.00**. Note that you may need to change the Status filter for the list to All or Closed in order to view the transaction, since it will be removed from the list of active transactions.

7

Circulation Relationships

Definitions

- **Circulate For** relationships determine whether a library can check out and check in items owned by another library. Note that check in only relationships are not supported in Alma.
- **Deliver To** relationships determine whether a library's items can be sent to another library for pickup by a patron – that is, whether other libraries will appear in the list of possible pickup locations when a request for a physical item is created by, or on behalf of, a patron. Note that fulfillment unit definitions also affect which pickup locations are actually available for a request.

Notes

- By default, all Alma libraries can circulate for, and deliver to, all other Alma libraries.
- Exceptions to the default may be based on configuration information provided by your institution or on data from the source system if the conversion programs can interpret this data.

Reviewing Circulation Relationships

Verify the accuracy of the **Deliver to** and **Circulate for** values for each library that has a circulation desk.

Testing Basic Circulation Relationships Functionality

1 Check out an item from a library other than the one whose circulation desk you are **Currently at**.

Identify a patron to whom you will check out the item. Make sure he or she has a patron role with a relevant Scope, an Active status, and an Expiration Date that has not passed. Write down the patron's ID.

a Identify an item to be checked out. It should be a circulating item with a regular loan period (not short term) that is not already on loan. Write down the item barcode and note the library to which the item belongs.

b Log on as a user who has a Circulation Desk Operator role for a library that is **not** the Library that owns the item, but that should have a **Circulate for** relationship with the owning library. If necessary, change your **Currently at** value to the correct desk.

c Check out the item. The item should appear in the list of loans for this session.

2 Check in an item owned by a library other than the one whose circulation desk you are **Currently at.** While logged in as a Circulation Desk Operator currently at a circulation desk in a library that does **not** own the item you just checked out, but that should have a **Circulate for** relationship with the owning library, check in the item.

3 Place a hold request for an item, and select a pickup location other than the library that owns the item.

Note: If you allow requesting only for items that are not currently available (e.g. on loan), ensure that your test item is not currently available.

Identify a patron for whom you will place a hold request. Make sure that he or she has a patron role with a relevant Scope, an Active status, and an Expiration Date that has not passed. Write down the patron's ID.

a Search for a title to request. This should be a physical title that is held in only one library.

Note that this title is owned by the Grad Library.

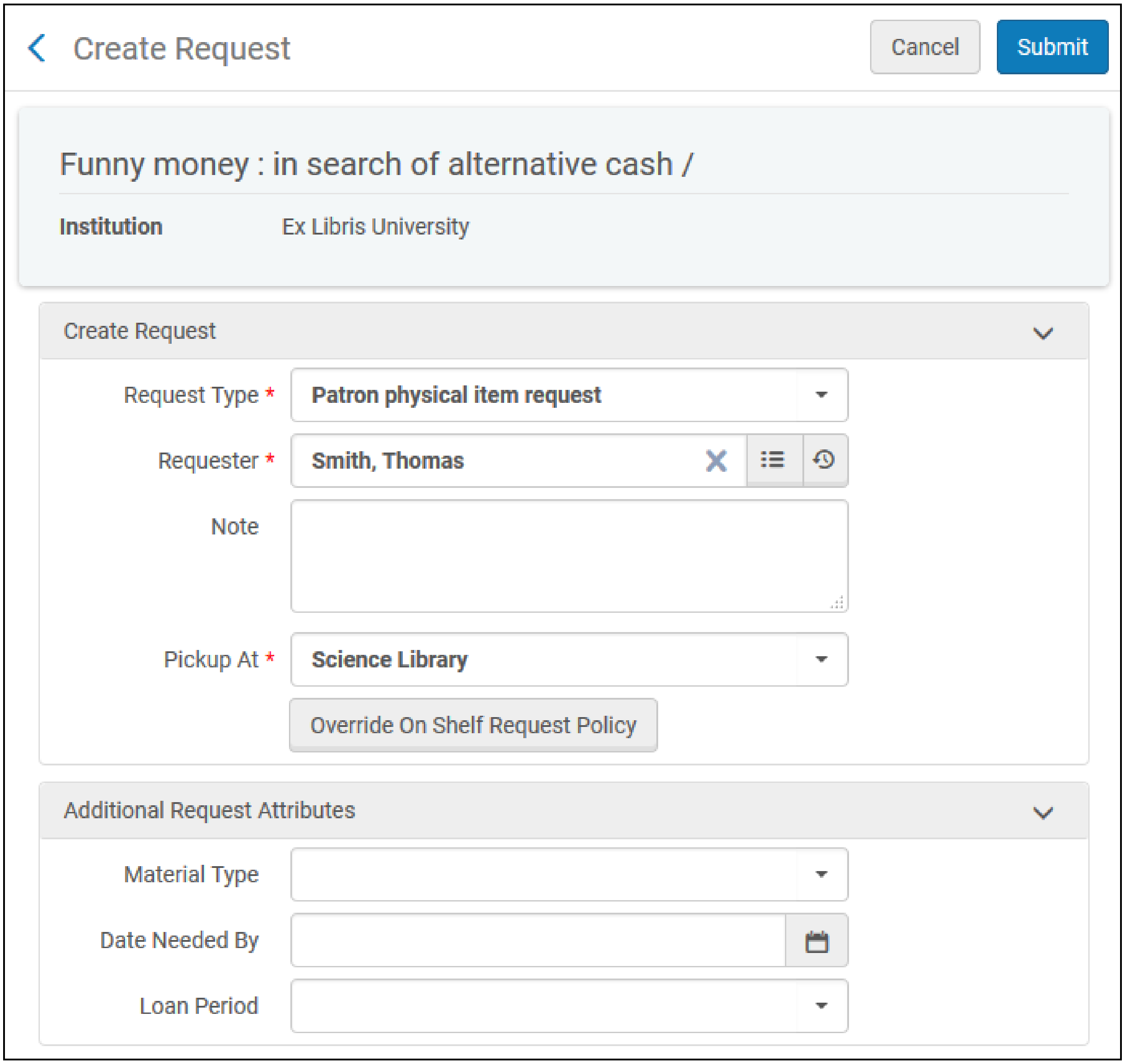
b Select **Request** from the row actions list. This opens the Create Request form.

c Select the **Patron Physical Item Request** from the **Request type** drop-down list. The request form expands with relevant fields.

d Enter the patron's ID, then select the patron's name from the list of suggestions.

e Select a location from the **Pickup at** drop-down list.

Note: This title is held in the Grad Library. The rules for fulfillment that apply to this library determine which libraries are listed as possible pick-up locations. Choose one of them.



f Click **Submit.**

A confirmation message appears at the top of the page indicating that the request was successfully submitted.

8

Course Reading

In Alma, there are two kinds of Course Reading records: Course Records and Reading Lists.

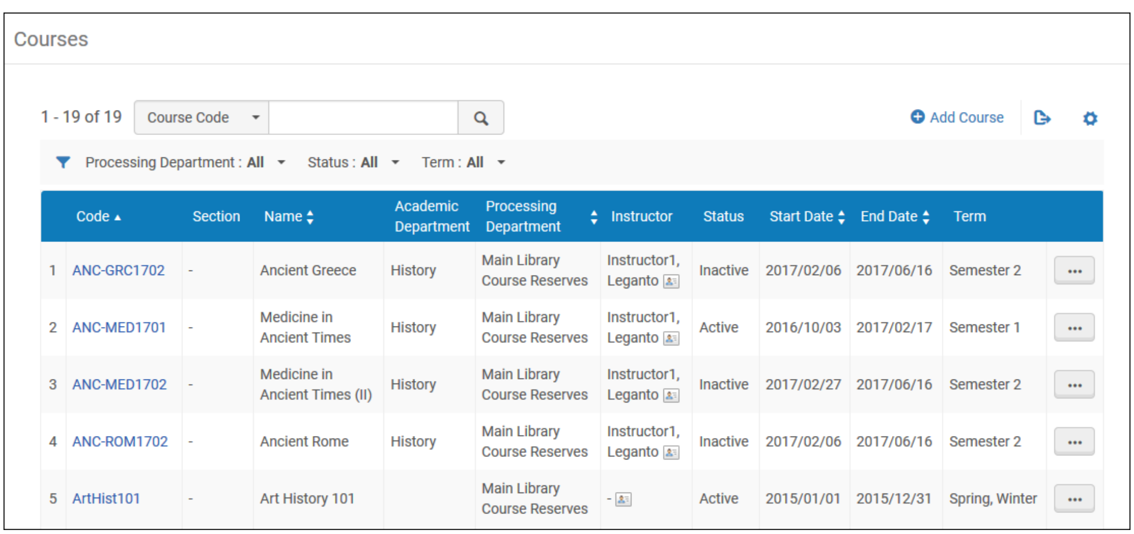
Finding and Reviewing Course Records

1 To find course records, on the Alma main menu, go to **Fulfillment > Course Reserves > Courses**. The List of Courses page opens.

Note: You can filter the list by Department, Status, or Term.

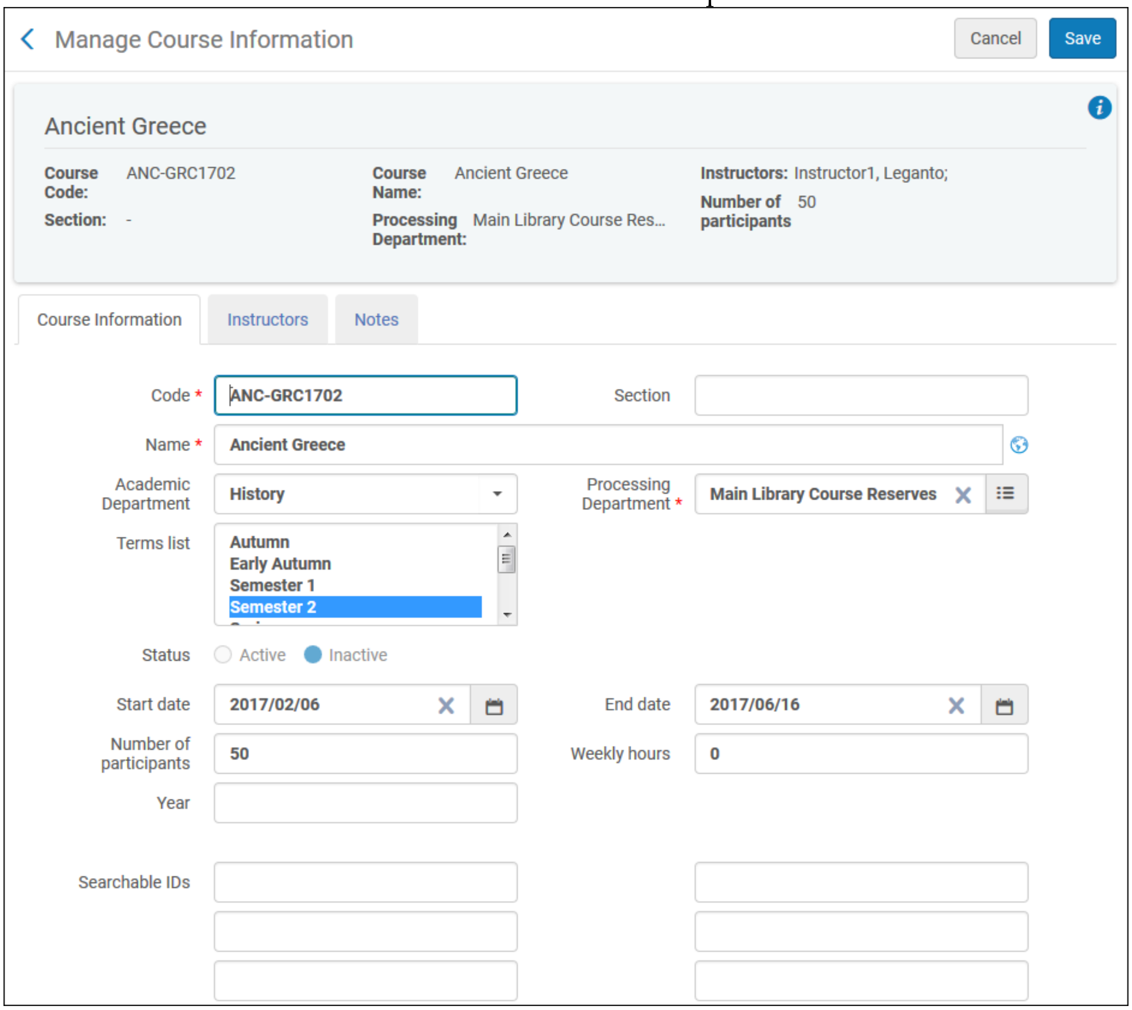
You can sort the list by Course Code, Course Name, Processing Department, Start Date, or End Date (ascending or descending for all sorts).

You can search for a course using the Find box. Course Code and Course Name searches are possible. Alternatively, select All to search either. Note that some of the other search types listed in the drop-down list will not work because the data does not appear in migrated records.



	Code	Section	Name	Academic Department	Processing Department	Instructor	Status	Start Date	End Date	Term
1	ANC-GRC1702	-	Ancient Greece	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/06	2017/06/16	Semester 2
2	ANC-MED1701	-	Medicine in Ancient Times	History	Main Library Course Reserves	Instructor1, Leganto	Active	2016/10/03	2017/02/17	Semester 1
3	ANC-MED1702	-	Medicine in Ancient Times (II)	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/27	2017/06/16	Semester 2
4	ANC-ROM1702	-	Ancient Rome	History	Main Library Course Reserves	Instructor1, Leganto	Inactive	2017/02/06	2017/06/16	Semester 2
5	ArtHist101	-	Art History 101		Main Library Course Reserves	-	Active	2015/01/01	2015/12/31	Spring, Winter

2 To view details for a course, click the course code link, or select **Edit** from the row actions list. The Course Information tab of the course record opens.



3 Review data for a course record in the **Course Information** tab:

- **Code**: The course code. This value should be copied from the source system.
- **Section:** If there are section numbers in the source system, the values should be converted to this field. Note that `00` is a valid value if it was used in the source data. Verify that a separate course record has been created in Alma for each section of the course.
- **Name:** The course name. This value should be copied from the source system.
- **Academic Department:** The academic department that offers the course.
- **Processing Department:** This is the name of the library unit that manages courses and reading lists for this academic department. By default, this value is COURSE_UNIT.
- **Terms list:** If values in the source system cannot be mapped easily to Alma values, this data may be written to a note.

- **Status:** If possible, explicit status values in the source system are mapped to Alma **Active** and **Inactive** values. Otherwise, if the end date for the course has passed, a status of **Inactive** is assigned. If it has not passed, a status of **Active** is assigned.
- **Start date:** This value should be migrated from the source system.
- **End date:** This value should be migrated from the source system.
- **Number of participants:** If this value is present in the source system, it should be migrated to Alma.
- **Weekly hours:** If this value is present in the source system, it should be migrated to Alma.
- **Year:** If this value is present in the source system, it should be migrated to Alma.

4 Review data in the **Instructors** tab of the course record. In Alma, the instructor must be an Alma user. When it is not possible to match the instructor's name in the source system to an Alma user easily (usually because this is uncontrolled data in the source system), the instructor name is written to a note.

5 Review data in the **Notes** tab of the course record.

Two kinds of notes may appear in this tab:

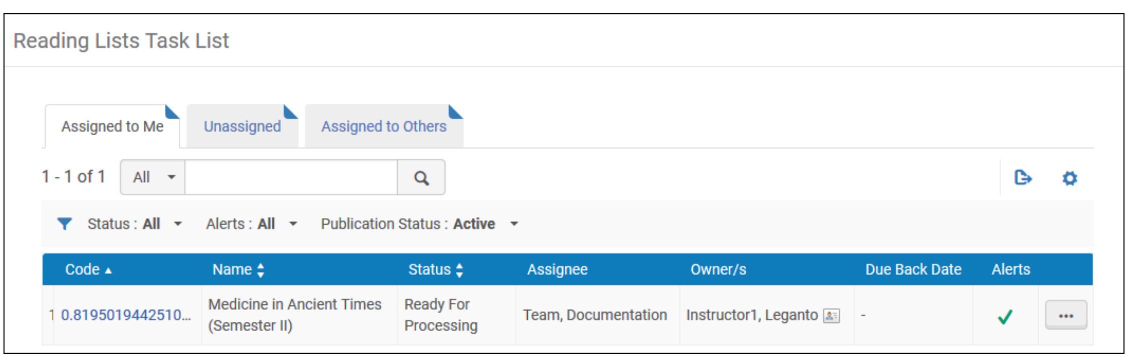
- Notes from note fields in the source system: These will be preceded by the label **Note:**. The value should be copied from the source system.
- Notes created during migration: These will be preceded by a label indicating what type of data is represented by the note. The value will be migrated from the source system.

Finding and Reviewing Reading Lists

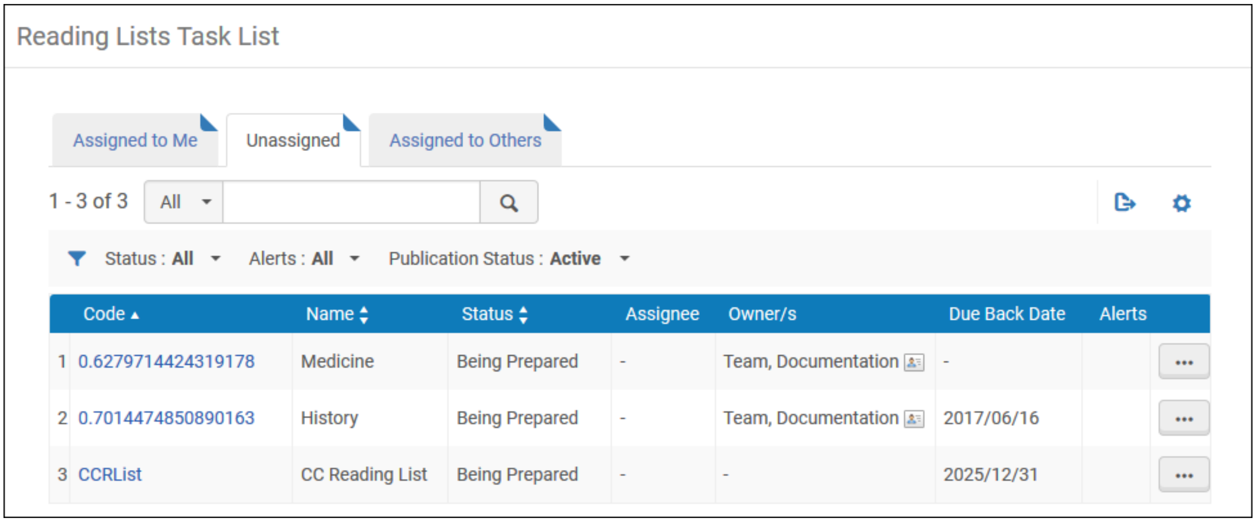
1 To find reading lists:

a. On the Alma main menu, go to **Fulfillment > Course Reserves > Reading Lists.**

The Reading Lists Task List page opens with the Assigned to Me tab open.



b. Open the Unassigned tab, since most reading lists will be found there.



Note: You can filter the list by Status or Alerts. However, for the purpose of review, it is best to retain the defaults of All/All.

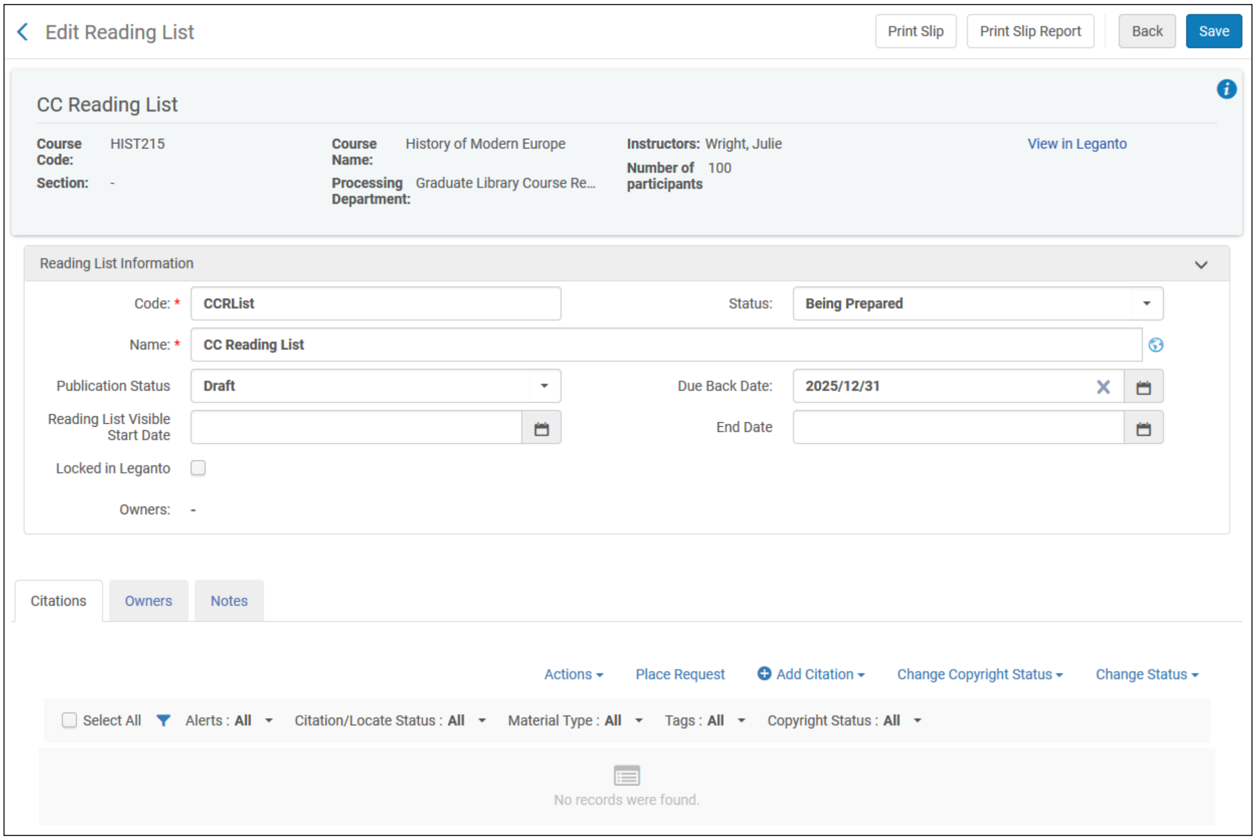
You can sort the list by Code, Name, or Status (ascending or descending in all cases).

You can search for a reading list by entering a search term in the Find box.

2 Review reading list data:

a. From the Reading Lists task list, click the code link or select **Work On** from the row actions list for a reading list. This opens the reading list record for editing.

b. Review basic reading list data. Note that data in the header comes from the course record for which the reading list was created.



- **Code:** The reading list code may consist of the course code, RL, and a sequential number, with the segments of the code separated by hyphens or simply be based on the source system reading list code. This depends on your source system.
- **Name:** The reading list name may consist of the course name, reading list, and a sequential number or simply be based on the source system reading list code. This depends on your source system.
- **Status:** The status will be **Complete** in all cases.
- Review citations for the reading list. Note that:
  - The **Citations** tab will be open by default when the reading list record is displayed.
  - You can filter the list of citations by Alert, Locate Status, or Type. However, for the purposes of review, retain the All/All/All defaults.
  - The display of bibliographic and availability data in the list is the same brief record display used in the records retrieved by a repository search.

c. Verify that there is the same number of citations in the reading list in Alma and the source system. Bear in mind that there may be multiple reading lists for the same course. If citations come from multiple sources, ensure that citations from all sources are represented in the converted data.

d. Verify that the same citations are included in the reading list in Alma and the source system.

   - **Citation status** will always be **Complete** in migrated records.
   - **Resource locate status** will always be **Resource Located** in migrated records.

3 Open the **Notes** tab just above the citation list to review notes.

   Notes in converted records may relate to the course, rather than the reading list. In this case, they should match the notes in the course record.

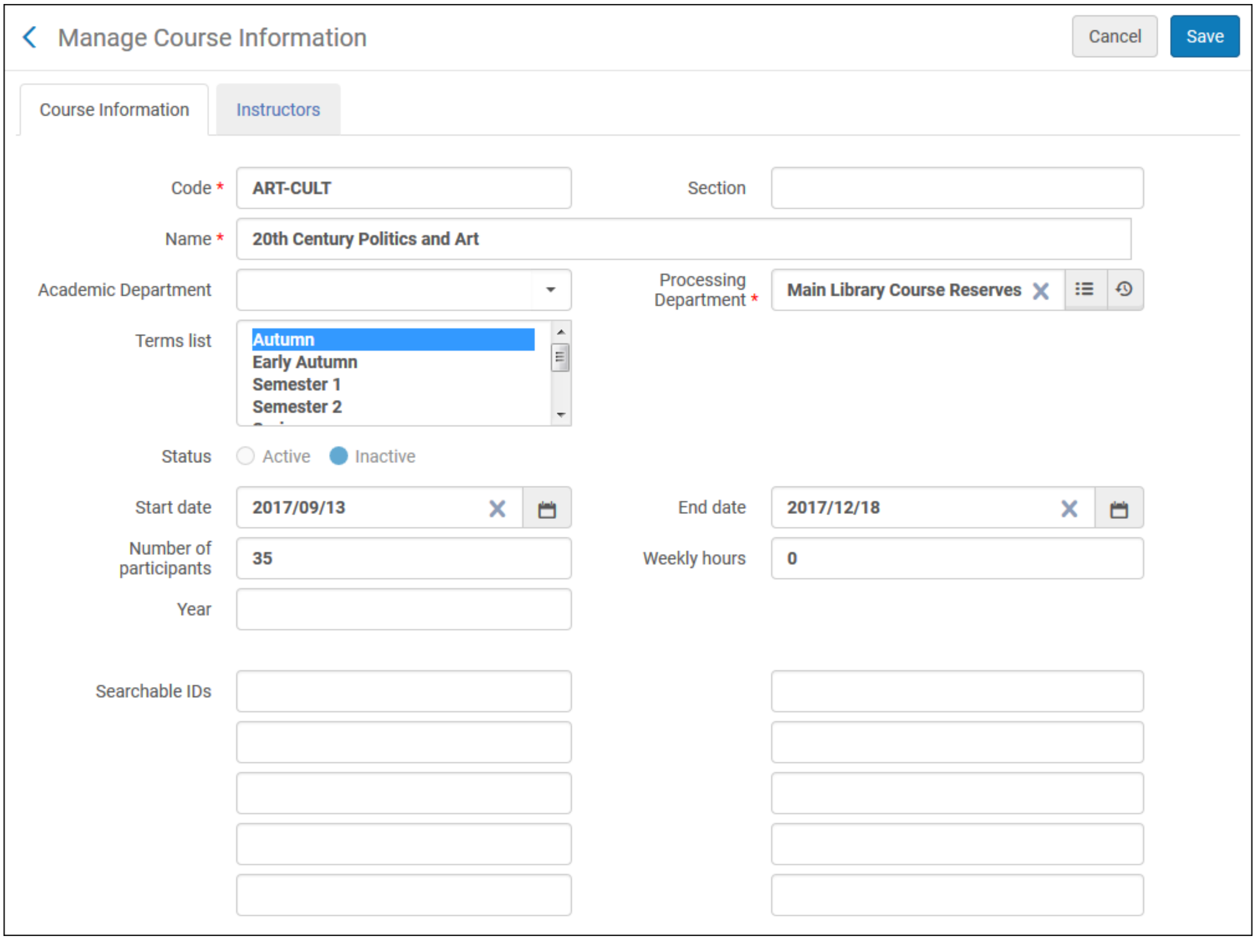
Testing Basic Course Reading Functionality

1 Create a course.

   a Open the list of courses (**Fulfillment > Course Reserves > Courses**), then click the **Add Course** button.

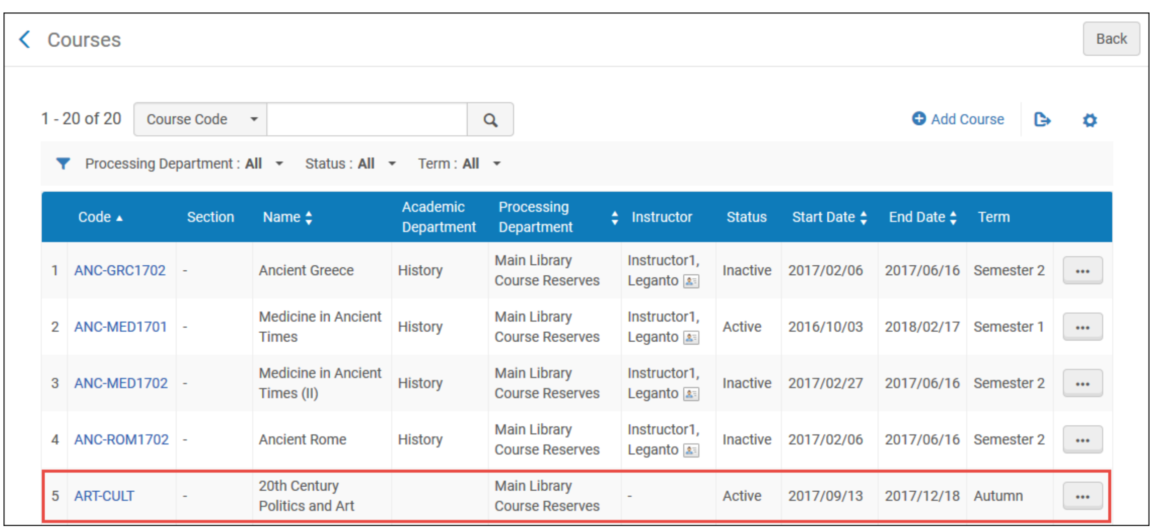
   The Course Information tab opens.

   b. Fill in all required values for the course, as well as any optional values you wish to enter. For a new course (created in Alma, not migrated), the Processing Department must be selected. Note that the **Processing department** will be converted to **COURSE_UNIT**.



c. Click **Save**.

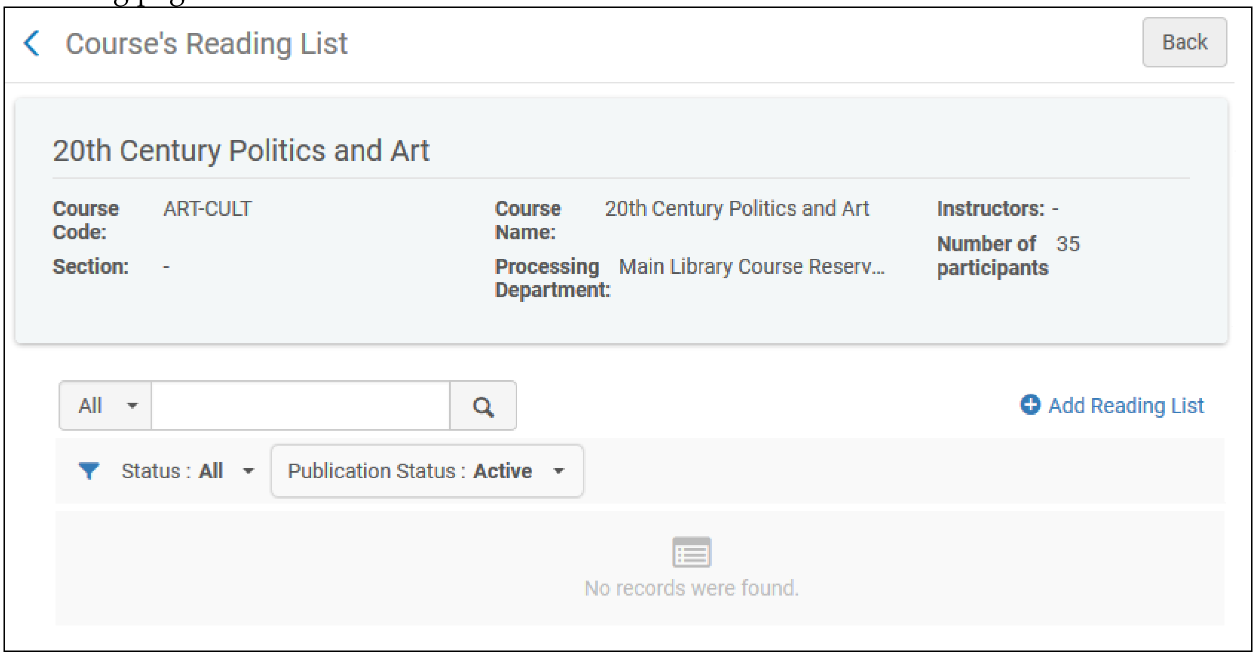
The new course should appear in the list of courses.



2 Create a **reading list** to go with the course you just created.

a Open the list of courses.

b. Select **Reading List** from the row actions list for the course you created. This opens the following page.

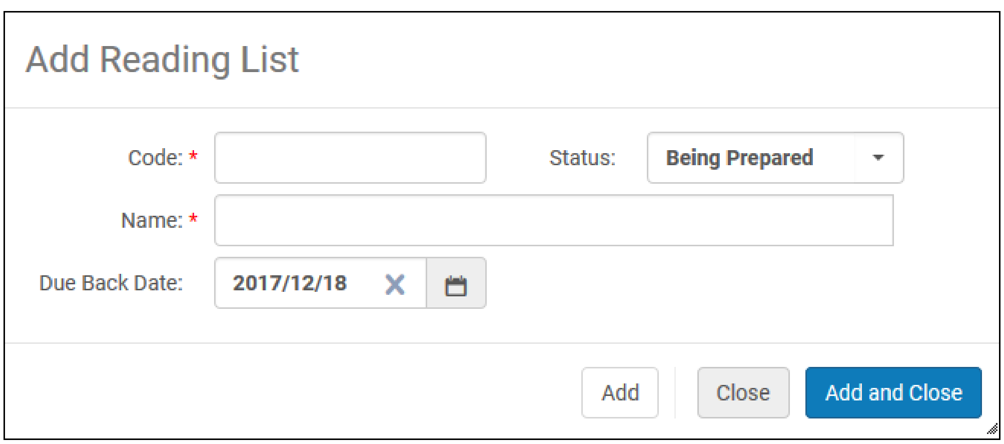


c. Click **Add Reading List**.

d. In the Add Reading List pop-up window, enter the **Reading list code** and **Name**.

e. Follow the same conventions for structuring this data as were used in migrated data.

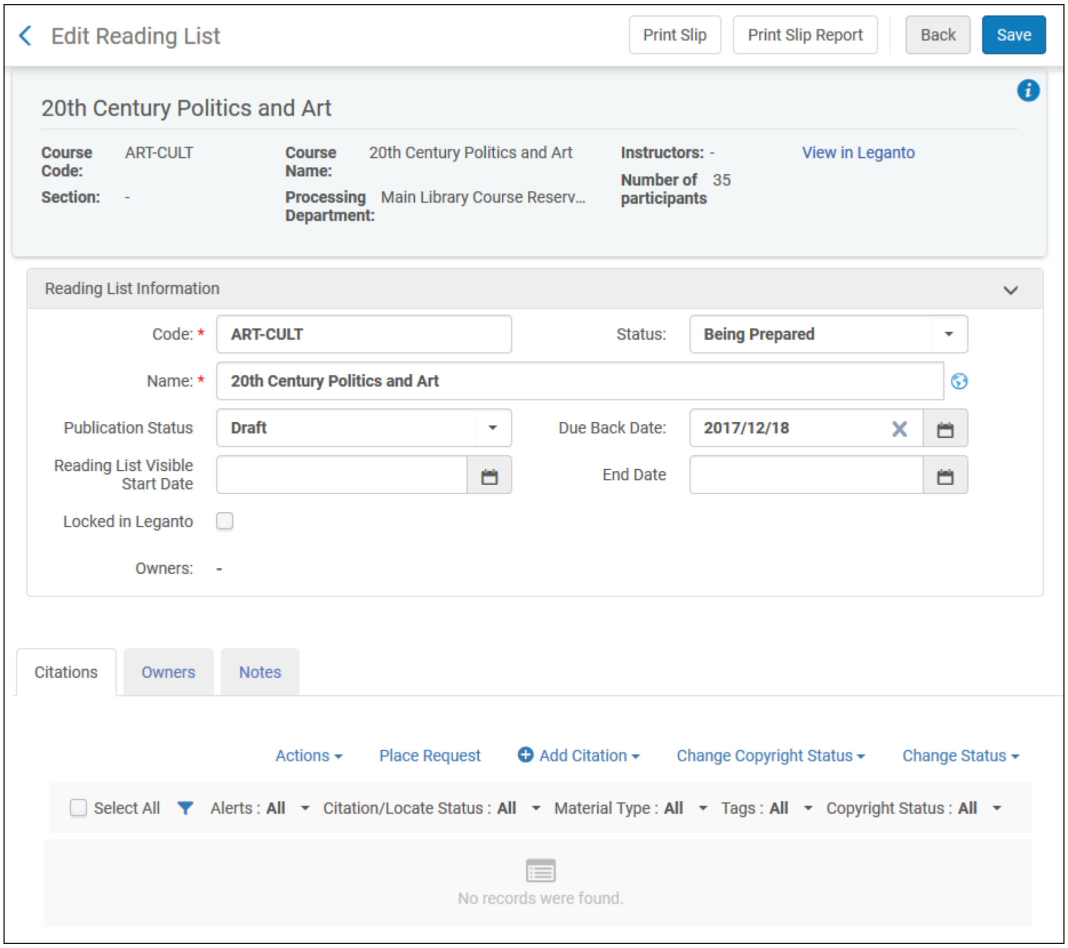
Note: The end date for the course is automatically copied to the **Due back date** field.



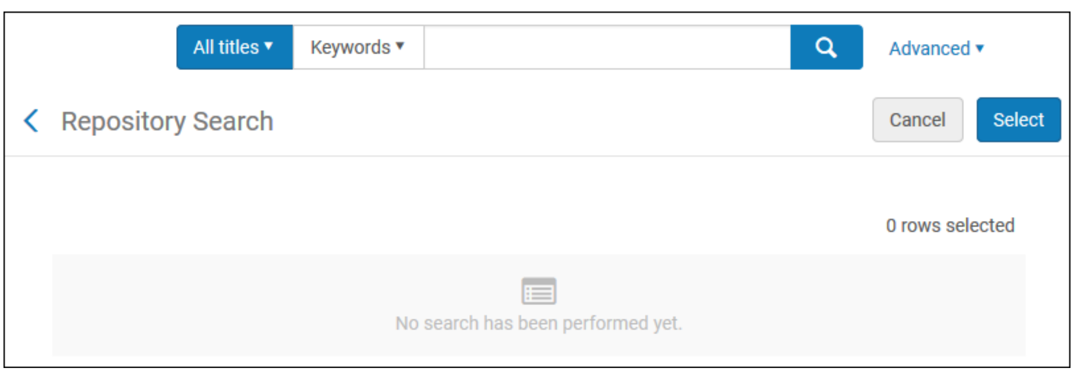
f. Click **Add and Close**. You will be returned to the page where you started, with the reading list now listed. The status for the list will be **Being Prepared**.

3 Add citations to the reading list you just created.

a Open the Edit Reading List page for the reading list by clicking the code link.

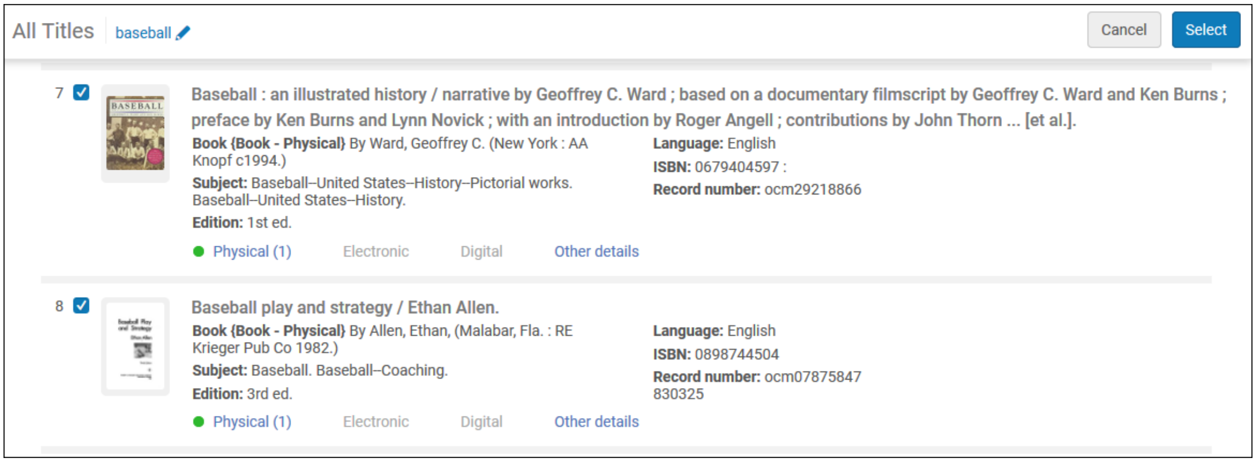


b Click the **Add Citation** button, then the **Add Repository Citation** action. This opens the Repository Search page. Enter a search.



For more information on the search box, see [Searching in Alma]() in the Customer Knowledge Center.

b. In the results list, select the check boxes for two titles.

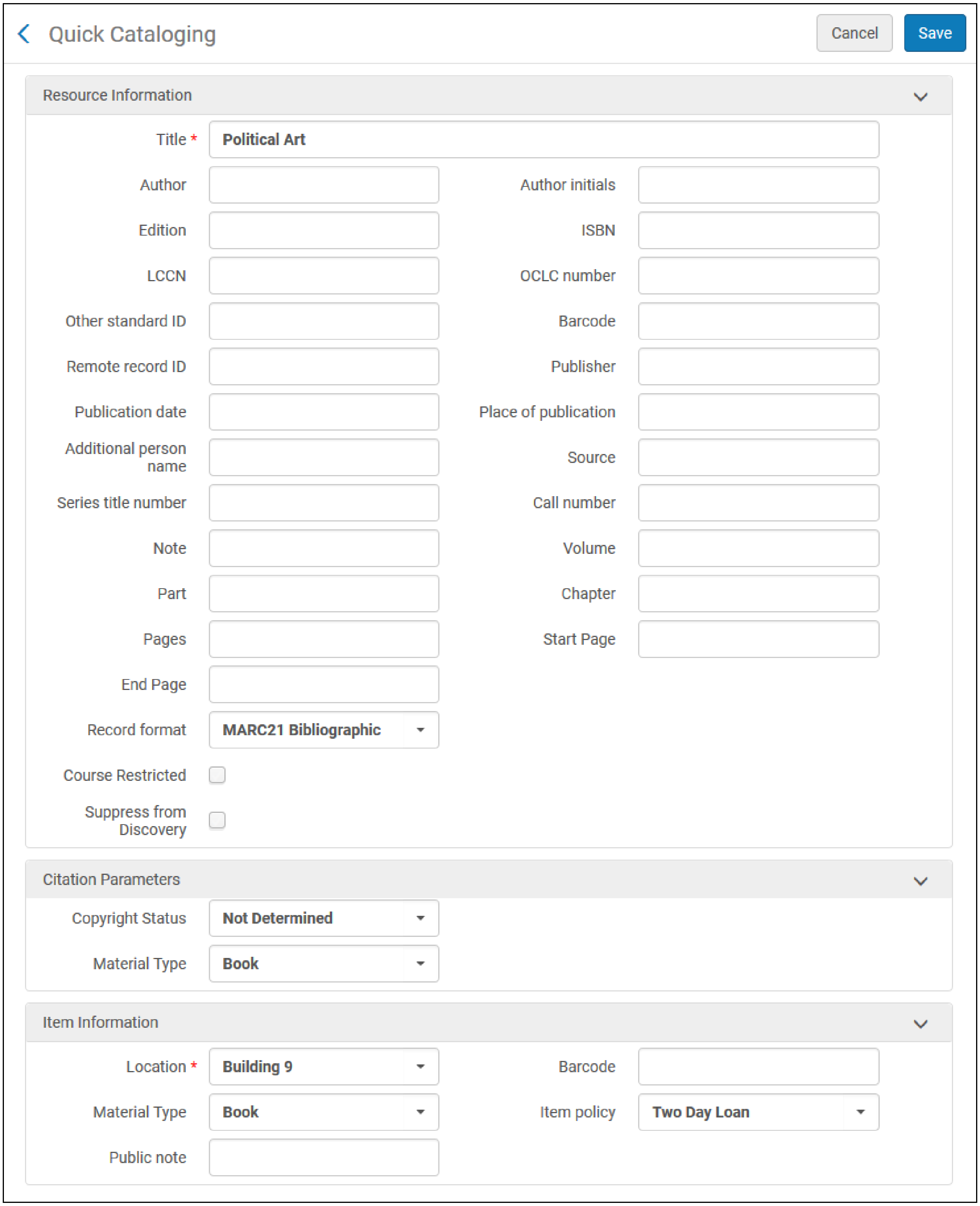


c. Click the **Select** button at the top or bottom right of the page. The titles you selected are added to the reading list.

d. Click the **Add Citation** button, then the **Add Brief** action. This option adds the record to the repository.

e. In the pop-up window, select **Book** from the **Citation Type** drop-down list, then click **Choose.**

The Quick Cataloging data entry page opens.



f. Enter **Resource Information**. A title is required. Enter any additional information.

g. Add **Item Information**. Initially, only the **Library** field is editable.

h. Type all or part of the library name in the box, then select a value from the list of options presented. Alternatively, click the arrow to the right of the box, and select a library from the resulting list.

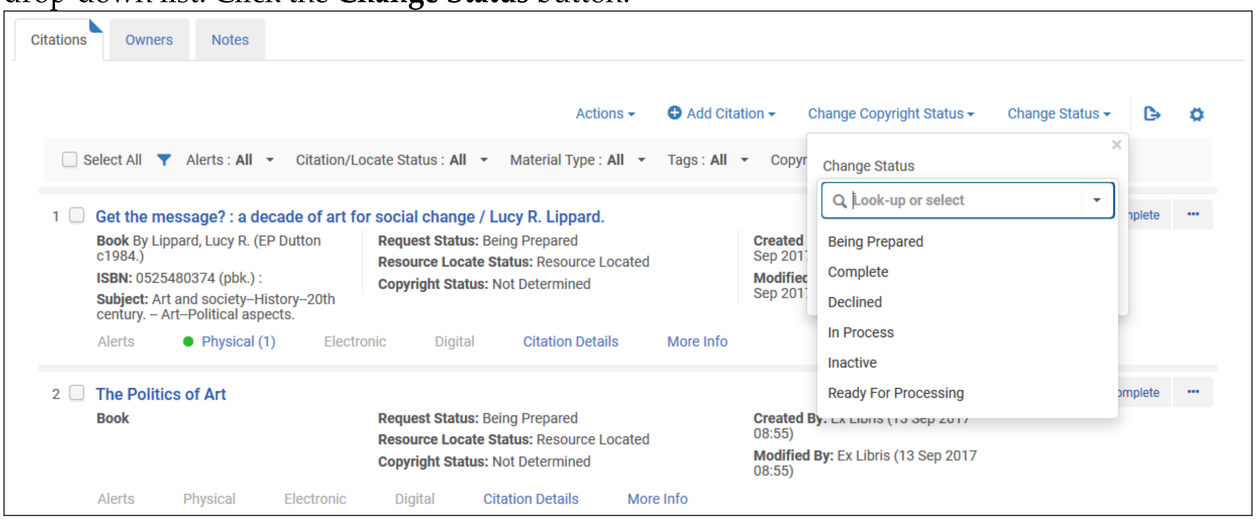
i. Enter other item information. Once you have selected a library, **Location**, **Barcode**, **Material type**, and **Item policy** can be entered.

j. Click **Save.** The citation is added to the reading list.

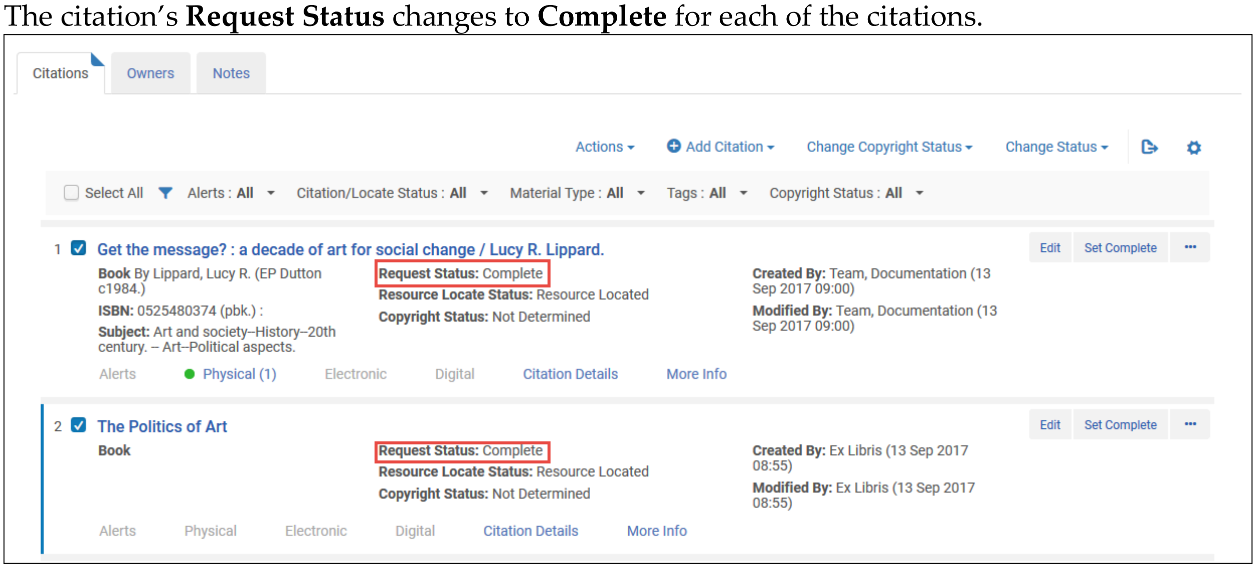
4 Change the status of the citations.

a Select the check box for each citation, or click **Select All** at the top of the list of citations.

At the top of the Citations section, click **Change Status**, then select **Complete** from the drop-down list. Click the **Change Status** button.

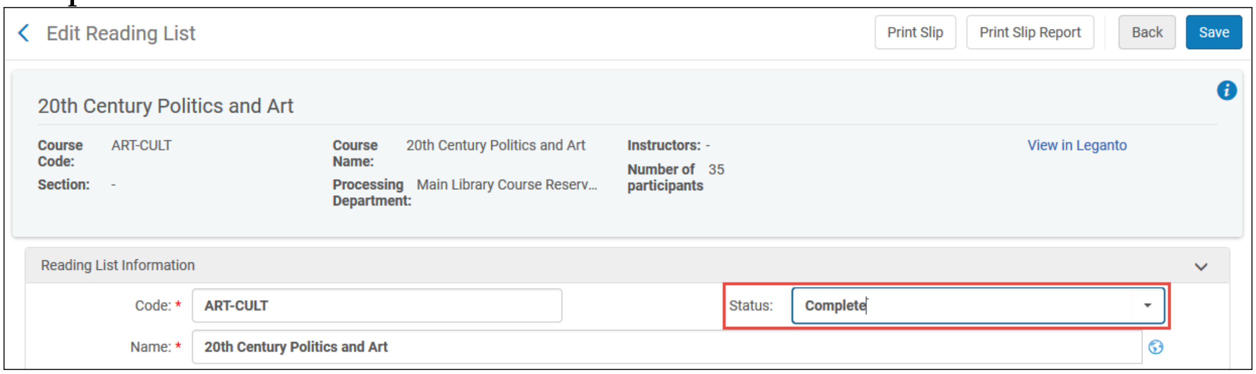


The citation's **Request Status** changes to **Complete** for each of the citations.



5 Change the status of the reading list.

a In the **Reading List Information** section of the record, change the Status of the list to **Complete.**



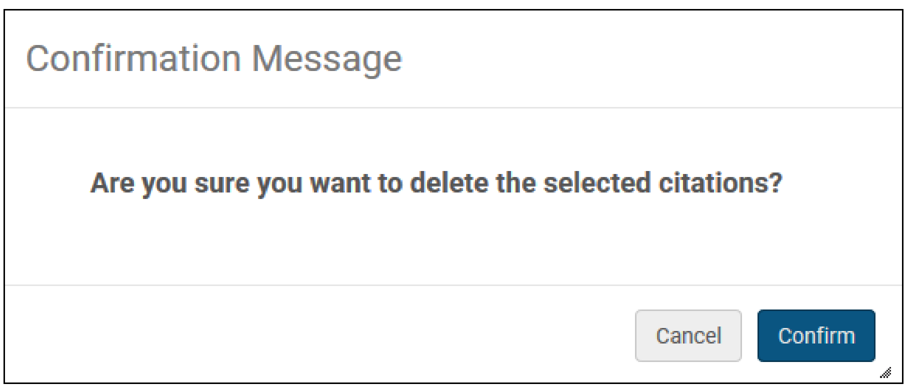
b. Click **Save**. The changed status is reflected in the list of readings lists.

6 Remove a citation from the list.

a Open the reading list for editing by clicking on the reading list's **Code** link.

b. Select the check boxes for the citations you want to remove and select the **Remove Citations** action from the table actions list.

c. Click **Confirm** in the pop-up window.



The citation is removed from the reading list.