# I-Share Alma Migration

# Data Migration Review

Instructions 2

Bibliographic Records 3

MFHD or other Holdings Records 8

Item Records 13

E-Resources 20

Patron (Borrower) Records 24

Charge Transactions 32

Acquisitions Data 37

Reserves Data 43

### Instructions

* Use these worksheets to collect test cases for your library’s data migration to Alma. Test cases will help you identify whether your data have migrated according to expectations, and also help identify how problem data may have migrated as well. These worksheets are for your benefit; use them in whatever way makes the most sense at your institution. The more examples you find and prepare in advance, the better.
* You do not need to return these worksheets to the CARLI Office.
* This document suggests some “notable features” of which libraries might want to collect examples. Feel free to collect more than one example of each “feature.”
* If your library does not have a record with one of the suggested features—for instance, if you do not happen to have a bib record with more than 100 items attached to it, or a National Library of Medicine call number—don’t worry about it. Feel free to skip any entries in the worksheets that are not applicable to your data.
* Use the blank rows to note additional records you want to scrutinize, particularly if there are additional “notable features” in your data that are not suggested in the table. Feel free to enlarge the table, or to make additional copies of it.
* Be aware of what record types your library has opted to migrate. For example, did you migrate acquisitions data? Course reserves? Etc.
* You can use the “Voyager Record #” column to record the number that you will use to search for the example records during the review. The different types of records being converted will use different data elements for searching. The most efficient search for bibliographic records is the Voyager Bib ID **(copied to the 959 $a in bib records\*).** For item records, the most efficient search is the item’s barcode number. For patron records, the most efficient searches are by patron barcode or Institution ID. For the charge transactions, the most efficient search is the patron’s barcode.
* You can use the “Pre-migration comments” column for reminders to yourself about what you will be looking for. For instance, if the “notable feature” is that the bibliographic record contains diacritics, use the “Pre-migration comments” column to record exactly which diacritics appear in which fields. Then use the “Post-migration comments” column to record any problems or inconsistencies you encounter. Your library may choose to record the date in each row, or just once on each worksheet. Likewise, your library may choose to record the initials of the tester, or simply to place a check in the final column when the example record has been scrutinized within Alma.
* After data has been extracted from Voyager, **do not edit these examples** if possible. You need to be able to compare data-as-extracted with data-as-converted. If you find you have to edit or replace examples you have selected, be sure to find new examples that are unedited since prior to the extract date.

**\*** The Voyager Bib ID will be copied into a 959 field prior to the production load. CARLI Staff are working on adding these 959 fields prior to the test load, but not all records will be updated before the extract, so be sure to note other identifying information about the record (e.g. Title, OCLC Number, ISBN, “I’m looking at the 2014 e-book bib not the 2013 2 volume print book bib”) on these worksheets.

Record IDs will appear as 959  $a (XXXdb)######

| Bibliographic Records |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | A “MARCette” or particularly brief bibliographic record |  |  |  |  |  |
|  | A particularly long bibliographic record—one that contains many fields |  |  |  |  |  |
|  | A record that contains a few particularly long fields |  |  |  |  |  |
|  | A record that contains repeated fields |  |  |  |  |  |
|  | A record that contains an 856 field |  |  |  |  |  |
|  | A record that contains diacritics in a heading field |  |  |  |  |  |
|  | A record that contains diacritics in a note field |  |  |  |  |  |
|  | A record at encoding level 8 |  |  |  |  |  |
|  | A record for each type and bib level combo (am, as, gm, etc.). Use extra worksheet rows. |  |  |  |  |  |
|  | A “pre-format-integration” record (no 006 or 007 fields) |  |  |  |  |  |
|  | A “post-format-integration” record (a record with an 006 and 007 field)  |  |  |  |  |  |
|  | A record with multiple 007 fields |  |  |  |  |  |
|  | A pre-RDA record for an electronic resource (a record with a GMD) |  |  |  |  |  |
|  | An RDA record for an electronic resource (a record with 33X fields) |  |  |  |  |  |
|  | A record that contains 9XX fields |  |  |  |  |  |
|  | Records for a bound-with (two or more bibs linked to one holding) |  |  |  |  |  |
|  | A record from a Major Microform set or other special one-time batch load |  |  |  |  |  |
|  | A record from Marcive or other regular supplier of records |  |  |  |  |  |
|  | A record that contains CJK, Hebrew, Arabic, or other scripts data in an 880 field |  |  |  |  |  |
|  | A record to which a large number of item records are attached (perhaps 100+ items) |  |  |  |  |  |
|  | A record to which no item holdings records are attached |  |  |  |  |  |
|  | A record with a 10-digit ISBN |  |  |  |  |  |
|  | A record with a 13-digit ISBN |  |  |  |  |  |
|  | A record with an 8-digit OCLC control number |  |  |  |  |  |
|  | A record with an OCLC control number of less than 8-digits |  |  |  |  |  |
|  | A record with a 9-digit OCLC control number |  |  |  |  |  |
|  | A record with a 10-digit OCLC control number |  |  |  |  |  |
|  | A record without an OCLC control number |  |  |  |  |  |
|  | A record with data other than the OCLC number in 035 $a |  |  |  |  |  |
|  | A record with data in 035 $z |  |  |  |  |  |
|  | A record with OK to Export checked |  |  |  |  |  |
|  | A record without OK to Export checked |  |  |  |  |  |
|  | A suppressed record with no holdings |  |  |  |  |  |
|  | A suppressed record with holdings and items attached |  |  |  |  |  |
|  | A record attached to a purchase order |  |  |  |  |  |
|  | A record for an item on reserve |  |  |  |  |  |
|  | A record with fields that should be marked as LOCAL based on IZ\_LOCAL\_BIB\_TAGS (migration form – questionnaire tab – question 30) |  |  |  |  |  |
|  | A bib record with a URL in a field other than 856 (e.g., 520, 540) |  |  |  |  |  |
|  | A bib record with only one URL in the 856 field and no holding records |  | [select records both included in P2E list and not included; use multiple rows] |  |  |  |
|  | A bib record with multiple 856 fields and no holding records |  | [select records both included in P2E list and not included; use multiple rows] |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| MFHD or other Holding Records |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | A particularly brief holding record (e.g., a MFHD with just an 004 and an 852 field) |  |  |  |  |  |
|  | A particularly long holding record—one that contains many fields (250+ items, for instance) |  |  |  |  |  |
|  | A “typical” type x MFHD |  |  |  |  |  |
|  | A “typical” type v MFHD |  |  |  |  |  |
|  | A “typical” type y MFHD |  |  |  |  |  |
|  | A “typical” type u MFHD |  |  |  |  |  |
|  | A record that contains a locally-defined call number |  |  |  |  |  |
|  | A record that contains a call number with special characters in it (e.g., colon for translation) |  |  |  |  |  |
|  | A record that contains an indexed call number prefix (e.g., prefix in 852$h) |  | [prefixes in Voyager, 852$c or 852$k, are not indexed] |  |  |  |
|  | A record that contains an unindexed call number prefix (i.e., 852$k) |  |  |  |  |  |
|  | A record that contains both an indexed and an unindexed call number prefix |  |  |  |  |  |
|  | A record that contains a call number suffix (e.g., 852$m) |  |  |  |  |  |
|  | A record that contains an LC call number (852 1st ind 0) |  |  |  |  |  |
|  | A record that contains a Dewey call number (852 1st ind 1) |  |  |  |  |  |
|  | A record that contains an NLM call number (852 1st ind 2) |  |  |  |  |  |
|  | A record that contains a SuDoc call number (852 1st ind 3) |  |  |  |  |  |
|  | A record that contains no call number (any 852 1st indicator) Use extra worksheet rows |  |  |  |  |  |
|  | A record that contains an explicit “copy 1” (852 $t 1) |  |  |  |  |  |
|  | A record without an explicit copy number (no 852$t) |  |  |  |  |  |
|  | A record for multiple single-volume copies |  |  |  |  |  |
|  | A record for one multi-volume copy |  |  |  |  |  |
|  | A record for multiple multi-volume copies |  |  |  |  |  |
|  | A holdings record with a URL in a field other than 856 (MFHD 866?) |  | [select records both included in P2E list and not included; use multiple rows] |  |  |  |
|  | A MFHD record with a URL in the 856 field only |  | [select records both included in P2E list and not included; use multiple rows] |  |  |  |
|  | A record with multiple 856 fields |  | [select records both included in P2E list and not included; use multiple rows] |  |  |  |
|  | A record with a summary holdings statement (866 field) |  |  |  |  |  |
|  | A record with multiple levels of chronology (i.e., multiple 853s) |  |  |  |  |  |
|  | A record with multiple levels of enumeration (i.e., multiple 853s) |  |  |  |  |  |
|  | A record with complex holdings, in which the sequence of display is very important |  |  |  |  |  |
|  | A record with barcoded items |  |  |  |  |  |
|  | A record with pseudo-barcoded items (system-supplied barcodes of some sort) |  |  |  |  |  |
|  | A record with unbarcoded items |  |  |  |  |  |
|  | A record linked to multiple bibliographic records (a bound-with) |  |  |  |  |  |
|  | A record with a copy-level public note (852$z) |  |  |  |  |  |
|  | A record with an item-level public note (863$z) |  |  |  |  |  |
|  | A record with a copy-level staff note (852$x) |  |  |  |  |  |
|  | A record with an item-level staff note (863$x) |  |  |  |  |  |
|  | A record with items in different permanent locations than the MFHD 852 $b location |  |  |  | [Alma does not support items in different locations from the MFHD] |  |
|  | A record from a location that is being consolidated to a new location in Alma |  |  |  |  |  |
|  | A suppressed record with items attached |  |  |  |  |  |
|  | A suppressed record with no items attached |  |  |  |  |  |
|  | A record attached to a purchase order |  |  |  |  |  |
|  | A record attached to a serials check-in component |  |  |  |  |  |
|  | A suppressed record for an e-resource (no items) |  |  |  |  |  |
|  | A record with 852 $c moved to a new subfield (as specified in question 24 of migration form). |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| Item Records |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | A barcoded item |  |  |  |  |  |
|  | An unbarcoded item |  |  |  |  |  |
|  | An item with both an active and inactive barcode(s) |  |  |  | [The most recent active barcode will be added to the item; the other barcodes will be added as Internal Note 2] |  |
|  | A pseudo-barcoded item(with a system-supplied or “dummy” barcode) |  |  |  |  |  |
|  | An item with volume enumeration |  |  |  | [Also verify MFHD record] |  |
|  | An item with an explicit copy number in an enumeration field |  |  |  | [Also verify MFHD record] |  |
|  | An item with a non-zero replacement price recorded |  |  |  | [Converted to Internal Note 3 unless library selected to set the Item Price as the Alma Replacement Cost on the migration form – questionnaire tab – question 20] |  |
|  | An item with a replacement price of $0.00 recorded |  |  |  |  |  |
|  | An item linked to a serials check-in issue |  |  |  | [Also verify MFHD record] |  |
|  | An item with data in the spine label field |  |  |  | [Data in the spine label field may migrate to Internal Note 3 or not at all.] |  |
|  | An item with a statistical category applied |  |  |  |  |  |
|  | An item with multiple statistical categories applied |  |  |  | [Alma only has a place for 3 item statistical categories per item. If there are more than three statistical categories on a Voyager item, the fourth and subsequent categories are placed in the third statistical note, separated by a pipe (‘|’)] |  |
|  | An item whose permanent location is different from the MFHD 852 $b location |  |  |  | [Alma does not support items in different locations from the MFHD] |  |
|  | An item whose permanent location is different from its temporary location |  |  |  |  |  |
|  | A record with many historical circulation transactions tallied |  |  |  | [should be available in the item’s More Info details] |  |
|  | A record with zero historical circulation transactions tallied |  |  |  | [should be available in the item’s More Info details] |  |
|  | An item linked through a holding record to more than one bib record (bound-with) |  |  |  |  |  |

|  |  |
| --- | --- |
|  | Post migration comments affecting Item Status examples:Voyager has a system of item statuses that indicate what is happening to the item. For example, an item may be charged, on hold, lost, missing, in transit, in cataloging, etc. In addition, multiple item statuses can be applied to an item at any one time.In Alma, there are two indicators of the item status: the base status and the process type.The base status indicates whether or not the item is on the shelf. For migration, the base status is calculated based on Voyager item status values or by the presence or absence of a migrated loan record or an on-shelf hold request record in Alma. |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | An item with a status of “lost-library applied” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “lost-system applied” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “damaged” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “missing” |  |  |  | [This process status in Alma is set to TECHNICAL. The item statuses from Voyager are written to the Alma item internal note 3 that can then be searched and re-routed to the appropriate handling or department in Alma.] |  |
|  | An item with a status of “discharged”  |  | [Your library will only have items with a “discharged” status if you have a “shelving interval” enabled in Voyager.] |  | [set to baseStatus of On Shelf in Alma] |  |
|  | An item with a status of “claimed returned” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “withdrawn” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “at bindery” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | An item with a status of “overdue” |  |  |  | [set to baseStatus of Not On Shelf in Alma. An overdue loan is assigned the status of Lost – system applied. If a loan fails, it is also assigned the status of Technical – Migration, in case the loan was not migrated. If the loan is later migrated, when the loan is returned the status is moved. If it is not migrated, the item can be identified as lost.] |  |
|  | An item with a status of “cataloging review” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “circulation review” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | An item with a status of “in transit” |  |  |  | [This status is converted to Internal Note 3 with the date that they were sent in transit, but are marked as on shelf, without a process status] |  |
|  | An item with a status of “in transit- on hold” |  |  |  | [This status is converted to Internal Note 3 with the date that they were sent in transit, but are marked as on shelf, without a process status] |  |
|  | An item with a status of “in transit - discharged” |  |  |  | [This status is converted to Internal Note 3 with the date that they were sent in transit, but are marked as on shelf, without a process status] |  |
|  | An item with a status of “on hold” |  |  |  |  |  |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | An item with a status of “in process” |  |  |  | [set to baseStatus of Not On Shelf in Alma] |  |
|  | Items with multiple statuses (damaged+withdrawn, etc.). Use extra worksheet rows. |  |  |  |  |  |
|  | An item with a general note |  |  |  | [converted to Internal Note 1] |  |
|  | An item with a charge note |  |  |  | [converted to Fulfillment Note] |  |
|  | An item with a discharge note |  |  |  | [converted to Fulfillment Note] |  |
|  | An item with a temporary item type applied that is different than the permanent item type. |  |  |  |  |  |
|  | An item with a temporary item type applied that is the same as the permanent item type. |  |  |  |  |  |
|  | An item with data in the Enum field |  |  |  |  |  |
|  | An item with data in the Chron field  |  |  |  |  |  |
|  | An item with data in the Year field |  |  |  |  |  |
|  | An item with data in the Caption field |  |  |  |  |  |
|  | An item with data in the Free text field |  |  |  |  |  |
|  | An item with Pieces set to more than 1 |  |  |  | [Converted to Fulfillment Note] |  |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | An item with copy number 0 in the Copy field |  |  |  |  |  |
|  | An item that contains an explicit copy number 1 in the Copy field |  |  |  |  |  |
|  | An item that contains an explicit copy number other than “copy 1” in the Copy field |  |  |  |  |  |
|  | An item with a media type |  | [relevant only for media scheduler libraries] |  |  |  |
|  | An item that is charged to a local patron |  |  |  |  |  |
|  | An item that is charged to an I-Share patron |  |  |  |  |  |
|  | An item that is charged to a pseudo-patron (mending, binding, etc). |  |  |  |  |  |
|  | An item that was recently discharged (as of extract dates) |  |  |  |  |  |
|  | An item that has not circulated since being created |  |  |  |  |  |
|  | An item created in the circulation client |  |  |  | [Alma does not track where record created] |  |
|  | An item created in the acquisitions client |  |  |  | [Alma does not trackwhere record created] |  |
|  | An item with outstanding fines and fees associated |  |  |  | [When fines fees migrate to Alma, they are not automatically affiliated with the associated item record.] |  |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| **E-Resources** |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | P2E Conversion:A combined print and electronic bib record with 2 holdings, 1 MFHD with an electronic location and an 856 field and 1 MFHD with a print location and an 856 field |  |  |  | [check on conversions] |  |
|  | P2E Conversion:A combined print and electronic bib record with 2 holdings, 1 MFHD with an electronic location and an 856 field and 1 MFHD with a print location and no 856 field |  |  |  | [check if conversion to e type bib successful] |  |
|  | P2E Conversion:A suppressed bib that was listed in the P2E file |  |  |  | [may be skipped or moved over as suppressed based on your answer to migration form – questionnaire tab - question 73] |  |
|  | P2E Conversion:An unsuppressed bib that was listed in the p2eP2E file and also was listed in the link resolver data. |  |  |  |  |  |
|  | P2E Conversion:A suppressed MFHD that was listed in the P2E file |  |  |  | [may be ignored by migration program or moved over as unsuppressed based on your answer to migration form – questionnaire tab - question 74] |  |
|  | P2E Conversion:An unsuppressed MFHD that was listed in the P2E file and also was listed in the link resolver data |  |  |  |  |  |
|  | P2E Conversion:A bib record for a database or index |  |  |  | [check if conversion to e type bib successful, and that database activated instead of portfolio] |  |
|  | P2E Conversion:A bib record that is linked to a Voyager purchase order |  |  |  | [bib and portfolio or package should link to Purchase Order Line Item] |  |
|  | P2E Conversion: One 856 field with multiple electronic link $u’s (if present) |  | [check MFHD 856; if applicable, check bib 856 if no holdings on a separate line] |  | [check if only one link migrated] |  |
|  | P2E Conversion: 856 with electronic public note (often $z) |  | [check MFHD 856; if applicable, check bib 856 if no holdings on a separate line] |  | [check if note migrated] |  |
|  | P2E Conversion: One 856 with multiple public notes (ex. repeated $z, if present) |  | [check MFHD 856; if applicable, check bib 856 if no holdings on a separate line] |  | [check if only one note migrated] |  |
|  | P2E Conversion: 856 with electronic provider name information (often $3) |  | [check MFHD 856; if applicable, check bib 856 if no holdings on a separate line] |  | [check if provider name migrated] |  |
|  | P2E Conversion: 856 with linking text in $y |  | [check MFHD 856, if applicable, check bib 856 if no holdings on a separate line] |  | [check if linking text migrated] |  |
|  | P2E Conversion: One 856 with multiple linking text $y’s (if present) |  | [check MFHD 856, if applicable, check bib 856 if no holdings on a separate line] |  |  |  |
|  | A resource (ejournal, ebook, etc.) that was migrated both through P2E and link resolver. |  |  |  | [Check how many bibs are found in IZ and CZ. How many portfolios active.] |  |
|  | Link resolver data load: An ejournal from your source data (e.g., SFX, 360, Link Resolver Form). |  |  |  | [check if created an appropriate e type bib and portfolio] |  |
|  | Link resolver data load: An ebook from your source data (e.g., SFX, 360, Link Resolver Form). |  |  |  | [check if created an appropriate e type bib and portfolio] |  |
|  | Link resolver data load: A streaming media resource (video and/or music) from your source data (e.g., SFX, 360, Link Resolver Form). |  |  |  | [check if created an appropriate e type bib and portfolio] |  |
|  | Link resolver data load: A collection package from your source data (e.g., SFX, 360, Link Resolver Form). |  |  |  | [check if created an appropriate e type bib and collection and connected portfolios] |  |
|  | Link resolver data load: A database or index from your source data (e.g., SFX, 360, Link Resolver Form). |  |  |  | [check if created an appropriate e type bib and database] |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| Patron (Borrower) Records |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Name or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | One patron record representing each patron group in use at your library. Use extra worksheet rows. |  |  |  |  |  |
|  | A local patron record with a library-use ID (e.g. a patron record for “lost” or “mending” or “new bookshelf”) |  |  |  |  |  |
|  | A local patron record for an institutional borrower (e.g., another library) |  |  |  |  |  |
|  | An I-Share patron record who has material checked out at your library. |  |  |  |  |  |
|  | An I-Share patron record who owes your library lost item replacement fines. |  |  |  | [When fines fees migrate to Alma, they are not automatically affiliated with the associated item record.] |  |
|  | A patron record with no first name (given name) |  |  |  |  |  |
|  | A patron record with punctuation in the name (a hyphen, a period after an initial, etc.) |  |  |  |  |  |
|  | A patron record with punctuation as the last name (surname) |  | [Voyager requires each patron record to have data in the last name field, but some people do not have last names. Some libraries may have entered punctuation to represent the last name.] |  |  |  |
|  | A patron record with a middle name |  |  |  |  |  |
|  | A patron record with a title (Ms, Dr., etc.) |  |  |  |  |  |
|  | A patron record with a suffix (Jr., III, etc.) |  |  |  |  |  |
|  | A patron record without an Institution ID |  |  |  | [Check whether patron record was imported or rejected. The “primary identifier” choice on the migration form may affect results.] |  |
|  | A patron record with data in the SSN field |  | [Identify what kind of data are present; relevant if you answered “Yes” to question 38 on the migration form] |  | [Social Security Numbers must not appear in Voyager or Alma records.] |  |
|  | A patron record with a note |  |  |  | [Patron notes are migrated to a limited number of notes. The mapping is: General = LibraryBarcode = BarcodeAddress = AddressPhone = AddressPop-up = LibraryAll others = Other] |  |
|  | A patron record with multiple notes |  |  |  | [Patron notes are migrated to a limited number of notes. The mapping is: General = LibraryBarcode = BarcodeAddress = AddressPhone = AddressPop-up = LibraryAll others = Other] |  |
|  | A patron record with suspended privileges |  |  |  | [Voyager allows for a patron to be suspended with a suspension end date. This migrates to Alma as a block, with the suspension end date in the Alma block expiration date. If no end date is present in Voyager, the end date is set to the migration date + 1 year.] |  |
|  | A patron record where the patron has met a blocking threshold |  |  |  | [block thresholds in Alma will be different than those set in Voyager] |  |
|  | A patron record with more than one active barcode. |  | [Patron records should not have more than one active barcode in Voyaer, but, it does happen.]  |  | [If there is more than one active patron barcode for a certain patron, then the Alma user group is assigned the patron group associated with the barcode which has the most recent barcode status date.  |  |
|  | A patron record with a previous or superseded barcode number |  |  |  |  |  |
|  | A patron record where the patron record is expired, but the barcode is unexpired. |  |  |  |  |  |
|  | A patron record where their barcode is expired, but the patron record is not expired. |  |  |  |  |  |
|  | A patron record with a multi-line permanent mailing address |  |  |  | [Every postal and e-mail address is assigned all of the address types on migration to Alma. After migration, you can clear any of the address types you do not want to be used for the patron or you can update the patron address types via the patron loader.] |  |
|  | A patron record with a one-line permanent mailing address |  |  |  | [Every postal and e-mail address is assigned all of the address types on migration to Alma. After migration, you can clear any of the address types you do not want to be used for the patron or you can update the patron address types via the patron loader.] |  |
|  | A patron record with two or more addresses of the same record type (e.g., temporary) |  |  |  | [Every postal and e-mail address is assigned all of the address types on migration to Alma. After migration, you can clear any of the address types you do not want to be used for the patron or you can update the patron address types via the patron loader.] |  |
|  | A patron record with two or more addresses of different record types (e.g., a permanent and temporary address) |  |  |  | [Every postal and e-mail address is assigned all of the address types on migration to Alma. After migration, you can clear any of the address types you do not want to be used for the patron or you can update the patron address types via the patron loader.] |  |
|  | A patron record with an email address |  |  |  | [Every postal and e-mail address is assigned all of the address types on migration to Alma. After migration, you can clear any of the address types you do not want to be used for the patron or you can update the patron address types via the patron loader.] |  |
|  | A patron record with a telephone number |  |  |  |  |  |
|  | A patron record with a fax number |  |  |  |  |  |
|  | A patron record with a cell/mobile phone number |  |  |  |  |  |
|  | A patron record for each statistical category your library uses |  |  |  |  |  |
|  | A patron record for each ID type used locally (barcode with and without check digit, prefixes, etc.) |  |  |  |  |  |
|  | An expired patron record that will not be purged before migration (because of charges or fines) |  |  |  |  |  |
|  | An expired patron record that will be purged before migration |  |  |  | [purged records should not appear in Alma] |  |
|  | A patron record with the historical charges counter set to a number other than zero |  |  |  |  |  |
|  | A patron record with the claims returned count set to a number other than zero |  |  |  |  |  |
|  | A patron record with the self-shelved counter set to a number other than zero |  |  |  |  |  |
|  | A patron record with the lost items count set to a number other than zero |  |  |  |  |  |
|  | A patron record(s) with any of the other counts (fields 44-51 in the Patron SIF) set to a number other than zero |  |  |  |  |  |
|  | A patron record with a proxy. |  |  |  | [Proxy patron information is not migrated to the patron record in Alma. Proxy patron information is stored in a loan note for active loan transactions that were initiated by a proxy.] |  |
|  | A patron record that is a proxy for another patron. |  |  |  | [Proxy patron information is not migrated to the patron record in Alma. Proxy patron information is stored in a loan note for active loan transactions that were initiated by a proxy.] |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| Charge Transactions |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Name or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | An item charged to a local patron  |  |  |  |  |  |
|  | An item charged to an I-Share patron |  |  |  |  |  |
|  | An overdue item charged to a local patron |  |  |  | [An overdue loan is assigned the status of Lost – system applied.] |  |
|  | An overdue item charged to an I-Share patron |  |  |  | [An overdue loan is assigned the status of Lost – system applied.] |  |
|  | An item with a lost status charged to a local patron. |  |  |  | [When fines fees migrate to Alma, they are not automatically affiliated with the associated item record. We will learn whether lost items migrated to Alma are discharged from the patron’s account.] |  |
|  | An item with a lost status charged to an I-Share patron. |  |  |  | [When fines fees migrate to Alma, they are not automatically affiliated with the associated item record. We will learn whether lost items migrated to Alma are discharged from the patron’s account.] |  |
|  | A case where only one of several items attached to a single copy or title is charged |  |  |  |  |  |
|  | A case where all items attached to a single copy or title are charged to one patron |  |  |  |  |  |
|  | All items attached to a single copy or title are charged, but to different patrons |  |  |  |  |  |
|  | A case where many (100+) items are charged to a single patron |  |  |  |  |  |
|  | An item that has been renewed |  |  |  |  |  |
|  | A recently discharged item (in the “shelving” status at the time of the extract) |  |  |  |  |  |
|  | An item that is on hold for pick up at your library by a local patron. |  |  |  |  |  |
|  | An item that is on hold for pickup at another I-Share library, for an I-Share patron. |  |  |  |  |  |
|  | An item that is on hold for pickup at another I-Share library for a local patron |  |  |  |  |  |
|  | An item that was charged by a proxy patron |  |  |  | [Proxy patron information is not migrated to the patron record in Alma. Proxy patron information is stored in a loan note for active loan transactions that were initiated by a proxy.] |  |
|  | A fine/fee of each type your library uses, assessed to a local patron.  |  | [Libraries should amnesty as many fines/fees as possible before migration.] |  | [When fines fees migrate to Alma, they are not automatically affiliated with the associated item record.]The fine fee types in Voyager will be mapped to the following in Alma: Overdue, Media Booking Late Charge, Accrued Fine = OverdueFineLost Item Processing, Lost Equipment Processing = LostItemProcessFeeLost Item Replacement, Equipment Replacement = LostItemReplacementFeeILL Fee= ResourceSharingFeeMedia Booking Usage Fee, Information Fee = ServiceFeeEquipment Rental = CaseRentCourtesy Card = IssueLibraryCardDamaged = DamagedItemFineLost Library Card = LibraryCardReplacementCopy Card = RegistrationFee] |  |
|  | A fine/fee of each type your library uses, assessed to an I-Share patron |  | [Libraries should amnesty as many fines/fees as possible before migration.] |  | [When fines fees migrate to Alma, they are not automatically affiliated with the associated item record.]The fine fee types in Voyager will be mapped to the following in Alma: Overdue, Media Booking Late Charge, Accrued Fine = OverdueFineLost Item Processing, Lost Equipment Processing = LostItemProcessFeeLost Item Replacement, Equipment Replacement = LostItemReplacementFeeILL Fee= ResourceSharingFeeMedia Booking Usage Fee, Information Fee = ServiceFeeEquipment Rental = CaseRentCourtesy Card = IssueLibraryCardDamaged = DamagedItemFineLost Library Card = LibraryCardReplacementCopy Card = RegistrationFee] |  |
|  | Alma TOU testing examples. You will want one example representing each patron group, each item type, and each location at your library. You’ll want to set this up in a separate spreadsheet.When logged in with a Circ Desk Manager or a Circ Desk Operator role, the Alma> Fulfillment Tab> Advanced Tools> Fulfilment Configuration Utility allows you to enter a patron record and an item barcode; it will then show you the terms of use that will be applied for the combination. |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| Acquisitions Data |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | Vendor Record |  |  |  | [Select Vendor examples that have multiple address/accounts to verify] |  |
|  | Vendor Accounts |  |  |  |  |  |
|  | Ledgers |  |  |  |  |  |
|  | A summary fund with one or more allocated funds |  |  |  |  |  |
|  | An allocated fund with allocation transactions |  |  |  |  |  |
|  | An allocated fund with no allocation transactions |  |  |  |  |  |
|  | An allocated fund with one or more reporting funds |  |  |  |  |  |
|  | An allocated fund with no reporting funds |  |  |  |  |  |
|  | A reporting fund with line items |  |  |  |  |  |
|  | Purchase Orders Use multiple rows |  |  |  | [Select Purchase Orders in various states – Pending, Approved, Complete] |  |
|  | Purchase Order Line Items Use multiple rows |  |  |  | [Select Line Items in various states – Pending, approved, received partial, received complete, returned, etc.] |  |
|  | Invoices Use multiple rows |  |  |  | [Select invoices in various states—Pending, approved, complete] |  |
|  | An invoice line item assigned to a single allocated fund |  |  |  |  |  |
|  | An invoice line item assigned to multiple allocated funds |  |  |  |  |  |
|  | An invoice line item assigned to a single reporting fund |  |  |  |  |  |
|  | An invoice line item assigned to multiple reporting funds |  |  |  |  |  |
|  | An invoice line item assigned to a mix of allocated and reporting funds |  |  |  |  |  |
|  | A firm order purchase order created manually |  |  |  |  |  |
|  | A firm order purchase order created by EOD |  |  |  |  |  |
|  | An approvals purchase order created by EOD |  |  |  |  |  |
|  | A purchase order line item assigned to a single allocated fund |  |  |  |  |  |
|  | A purchase order line item assigned to multiple allocated funds |  |  |  |  |  |
|  | A purchase order line item assigned to a single reporting fund |  |  |  |  |  |
|  | A purchase order line item assigned to multiple reporting funds |  |  |  |  |  |
|  | A purchase order line item assigned to a mix of allocated and reporting funds |  |  |  |  |  |
|  | A continuations purchase order line item with a serials component |  |  |  |  |  |
|  | A continuations purchase order with multiple invoices  |  |  |  |  |  |
|  | A purchase order where the vendor was changed |  |  |  |  |  |
|  | A firm order purchase order with multiple invoices |  |  |  |  |  |
|  | A subscription purchase order line item with a $0.00 line price |  |  |  |  |  |
|  | A subscription purchase order line item with a non-zero line price |  |  |  |  |  |
|  | A standing order purchase order line item with a $0.00 line price |  |  |  |  |  |
|  | A standing order purchase order line item with a non-zero line price |  |  |  |  |  |
|  | An approval purchase order with a single-part line item |  |  |  |  |  |
|  | A firm order purchase order with a single-part line item |  |  |  |  |  |
|  | A firm order purchase order with a single-part line item for multiple copies |  |  |  |  |  |
|  | A gift purchase order with a single-part line item |  |  |  |  |  |
|  | A gift purchase order with a subscription line item |  |  |  |  |  |
|  | A deposit purchase order |  |  |  |  |  |
|  | An exchange purchase order |  |  |  |  |  |
|  | An invoice created by EDI |  |  |  |  |  |
|  | An invoice line item created by EDI |  |  |  |  |  |
|  | A serials component with a standard predictive pattern and issues received (suppressed and unsuppressed) |  |  |  |  |  |
|  | A serials component with a complex prediction pattern and issues received (suppressed and unsuppressed) |  |  |  |  |  |
|  | A serials component with a non-predictive pattern and issues received (suppressed and unsuppressed) |  |  |  |  |  |
|  | A purchase order older than five\* years  |  |  |  | [substitute for “five” the number of years you specified on your migration form for closing purchase orders] |  |
|  | A purchase older from the current fiscal year |  |  |  |  |  |
|  | An invoice from the current fiscal year |  |  |  |  |  |
|  | An invoice from a previous fiscal year |  |  |  |  |  |
|  | An invoice that includes payment information (i.e., check number and payment date) |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

| **Reserves Data** |
| --- |
| **#** | **Notable Features** | **Voyager Record # and Title or other Identifying info** | **Pre-migration comments / date** | **Alma Record #** | **Post-migration comments / date** | **initials** |
|  | An active course list |  |  |  | [On the migration form, your library can select to migrate no course reserves, all course reserves, or only the active course reserves. Make sure the results in Alma match your migration expectations.] |  |
|  | An inactive course list |  |  |  | [On the migration form, your library can select to migrate no course reserves, all course reserves, or only the active course reserves. Make sure the results in Alma match your migration expectations.] |  |
|  | A reserve list where items are turned “On Reserve” |  |  |  |  |  |
|  | A reserve list where items are turned “Off Reserve” |  |  |  |  |  |
|  | A reserve list linked to multiple courses |  |  |  | [In Alma, a reading (reserve) list may be assigned to one and only one course. In Voyager, a reading (reserve) list may have multiple courses linked to it. On migration, reading lists that have multiple linked courses are duplicated, once for each linked course. For example, if Reading List A is linked to both HIS 200 and SOC 200, then Reading List A will be created twice in Alma, once under HIS 200 and once under SOC 200.] |  |
|  | A reserve list linked to no courses |  |  |  | [In Alma, a reading (reserve) list may be assigned to one and only one course. In Voyager, a reading (reserve) list may exist without an attached course. In Alma, these reading lists are still migrated, but are attached to a generated course called No Course.] |  |
|  | A full bibliographic record on a reserve list (title owned by library) |  |  |  |  |  |
|  | A quick bib (professor’s personal copy) on reserve |  |  |  |  |  |
|  | An item on reserve at the time of migration |  |  |  | [Look at Internal Note 3; Alma should migrate the “ON\_RESERVE” flag and “RESERVE\_CHARGES” to this note] |  |
|  | A record for a migrated E-Item |  |  |  | [If your library selected on your migration form to migrate EItems] |  |
|  | A reserve list searched by instructor |  |  |  | [The Instructor field in Voyager is a free text field to specify the instructor for the course. In Alma, the field is linked to the user file – that is, the instructor for the course is linked to the instructor’s Alma user record. Since there is no way to parse the free text in the Instructor field, the professor/instructor text is mapped to the reading list note on migration to Alma.] |  |
|  | A reserve list searched by course name |  |  |  |  |  |
|  | A reserve list searched by list title |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |