Data conversion checklist from Alice to Oliver/Liberty v4

Softlink performs extensive internal checks on your data to detect most issues. However it is very important that you test for yourself that the data has converted correctly, as any issues reported after the trial period may cause inconvenience and possibly incur extra charges.

Softlink recommends that you complete the following checks, though this is a general guideline, not a definitive set of steps. Other parts of the system that are relevant to your library should also be tested.

Cataloguing

To check the Cataloguing data, you will need the following:

> 5 items from within a number of different parts of your collection.

For example. 5 Fiction items + 5 Non-Fiction items + 5 DVDs/Videos + 5 Posters.

You may select items from as many parts of your collection that you wish, but the minimum recommended total number of items is 15.

If you use more than one type of barcode format, it is recommended that you select items that represent each type of format used in your collection.

Item	How to check	References	Checked?
Resource barcodes scan correctly	For each selected resource, perform the following: 1. Open Circulation Desk 2. Switch to "Returns Mode" 3. Scan in the barcode of the item and check that the barcode is accepted. (Ensure that no unexpected error messages appear.) *If you have different barcode formats for resources, ensure that each format scans correctly.	Reference Manual – Circulation Desk Chapter	
General check of catalogue records	For each selected resource, perform the following: 1. Go to Cataloguing | Resources 2. Click on Resources | Search, and search for the selected resource 3. Click on the number link to view the full details of the selected resource's catalogue record. 4. Compare these catalogue details with the	Reference Manual – Cataloguing Chapter	

	screens in Alice to check that the data is converted across correctly. 5. Click on the number beside the barcode to check the details of the copy record. 6. Compare these copy details with the screens in Alice.		
OPAC check	For one of the selected resources, perform the following: 1. Open the OPAC 2. Perform a "title only" search for the title of the selected resource. 3. Ensure that a result is returned and that the results are as you would expect.	Reference Manual – OPAC Chapter	

Borrowers and Circulation

To check the Borrowers and Circulation data, you will need the following:

      5 borrower cards, from within different parts of your borrower base.

For example, 5 Students + 5 Staff + 5 Library staff

The minimum recommended number of total borrowers is 15.

It is recommended that the borrowers selected be a mix of those with items currently on loan, and those without any items on loan.

If your Library does not use individual borrower cards, please use the barcodes from your selected method of scanning borrowers (eg. Class sheets, etc).

Item	How to check	References	Checked?
Borrower barcodes scan correctly	For each selected borrower, perform the following: 1. Open Circulation Desk 2. Scan in the barcode and ensure that the correct borrower name appears.	Reference Manual – Circulation Desk Chapter	
General check of borrower records	For each selected borrower, perform the following: 1. Go to Circulation | Borrowers 2. Click on Borrowers | Search, and search for the selected borrower	Reference Manual – Borrowers Chapter	

	3. Click on the number link to view the full details of the borrower record. 4. Compare these borrower details with the screens in Alice to check that the data is converted across correctly.		
General check of loan records	For each selected borrower, perform the following: 1. Go to Circulation | Borrowers 2. Click on Borrowers | Search, and search for the selected borrower 3. If the borrower has current loans, the number of items on loan will be displayed in the On-loan column. 4. To firstly view the full details of the borrower record, click on the number link (on the left). 5. Click the Current Loans link to display the list of current loans for that borrower. 6. Compare these loan details with the screens in Alice to check that the loans data is converted across correctly. Note: Temporary loans are not part of the conversion process.	Reference Manual – Borrowers Chapter – Loan, Alert and SDI Details Section	
General check of loans history records (if applicable)	For each selected borrower, perform the following: 1. Go to Circulation | Borrowers 2. Click on Borrowers | Search, and search for the selected borrower 3. To firstly view the full details of the borrower record, click on the number link (on the left). 4. If the borrower has loans history, the Loans History link will appear. Click the link to display the list of loans history for that borrower. 5. Compare these loan history details with the screens in Alice to check that the loans history data is converted across correctly.	Reference Manual – Borrowers Chapter – Loan, Alert and SDI Details Section	

Serials (if applicable)

To check the Serials data, you will need the following:

> 5 serials from within your collection.

If you have less than 5 serials, select the number that you have available.

Try to ensure that you select some Serials that have subscriptions setup.

Item	How to check	References	Checked?
Components (Schedules) set up correctly	For each selected Serial, perform the following: 1. Go to Serials | Component 2. Locate the component you are checking 3. Check the details for the component and compare it with the screens in Alice to check that the data is converted across correctly. Bear in mind the serials modules differ, so some data may be adjusted.	Reference Manual –Serials Chapter – Component Section	
Subscription set up correctly	For each selected Serial, perform the following: 1. Go to Serials | Subscriptions 2. Find the selected serial and click the number link to view the full details. 3. Compare these subscription details with the screens in Alice to check that the data is converted across correctly. Bear in mind the serials modules differ, so some data may be adjusted. 4. Check that predicted issues are consistent with those in Alice Note: Only future issues based on the standard prediction schedule for that serial will be present, and any manually entered future issues will not convert.	Reference Manual – Serials Chapter – Subscriptions Section	

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Orders (if applicable)

To check the Orders data, you will need the following (if possible):

A current (outstanding) order

Item	How to check	References	Checked?
Orders converted correctly	For each selected Order, perform the following: 1. Go to Acquisitions | Orders 2. Find the selected order, and click on the number link to view the full details. 3. Compare these order details with the screens in Alice to check that the data is converted across correctly.	Reference Manual – Acquisitions Chapter	

Received Orders (if applicable)

To check the Received Orders data, you will need the following (if possible):

A completed (received) order

Item	How to check	References	Checked?
Orders converted correctly	For each selected Order, perform the following: 1. Go to Acquisitions | Orders History 2. Find the selected order, and click on the number link to view the full details. 3. Compare these order details with the screens in Alice to check that the data is converted across correctly.	Reference Manual – Acquisitions Chapter – Orders History Section	

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