



CARLI

I-SHARE ALMA PRIMO VE KICKOFF

July 11, 2019

Welcome!

Today's speakers will be:

Kristine Hammerstrand, CARLI, User Services Director

Anne Craig, Senior Director, CARLI

Jane Burke, Ex Libris, VP Strategic Initiatives

Melissa Hilbert, Ex Libris, VP Professional Services

Ben Grimshaw, Ex Libris, Project Manager

Jen Masciadrelli, CARLI, Senior Project Management Coordinator

Belinda Cheek, North Central College

Remarks from Anne Craig, CARLI Senior Director

- Thanks to the I-Share Next Task Force
- Alma Primo VE costs are well within our budget and the functionality will move us forward together
- Lots of work ahead in the year to come, but the outcome will be worth it
- Please continue to share your questions and concerns with us
- CARLI is looking forward to celebrating our 40th year of resource sharing in 2020!

Remarks from Jane Burke, Ex Libris VP Strategic Initiatives

- Thank you
- You have helped build our vision
- This next year is only the beginning

Our goals for CARLI:

- Efficiency and productivity
- Positioning you to take a bigger role on campus
- Leverage the benefits of Primo VE as an integrated discovery tool

Remarks from Melissa Hilbert, Ex Libris VP of Professional Services:

- Thank you
- Partnership and shared responsibility between CARLI and Ex Libris
- Investment in success
- Openness to feedback
- Thank you to Vanguard participants
- The end is the beginning

Why change our current setup?

- We've had Voyager since 2002, SFX since 2005
- Voyager was designed for managing print resources only
- SFX and other link resolver products are used with Voyager to help manage e-resources and direct users to e-content
- VuFind and WebVoyage serve to direct researchers to your library's collection, but not to your e-resources
- Your library may have licensed a third-party discovery service to provide discovery of your e-resources along with your catalog
- This combination of products makes for redundant work for staff and confuses many patrons in the discovery process

What will Alma and Primo VE change?

- Alma provides integrated electronic resource management (activation, link resolving, storing licenses, etc.)
- Primo VE provides discovery for the library's catalog of physical and electronic resources, as well as consortial resources and resource sharing
- Primo VE includes a Central Knowledge Base of e-resource packages, authority records
- Alma and Primo VE are web-based, no loading and managing Windows client software
- CARLI office staff will be able to provide more consortial services than we do now, through the Alma Network Zone

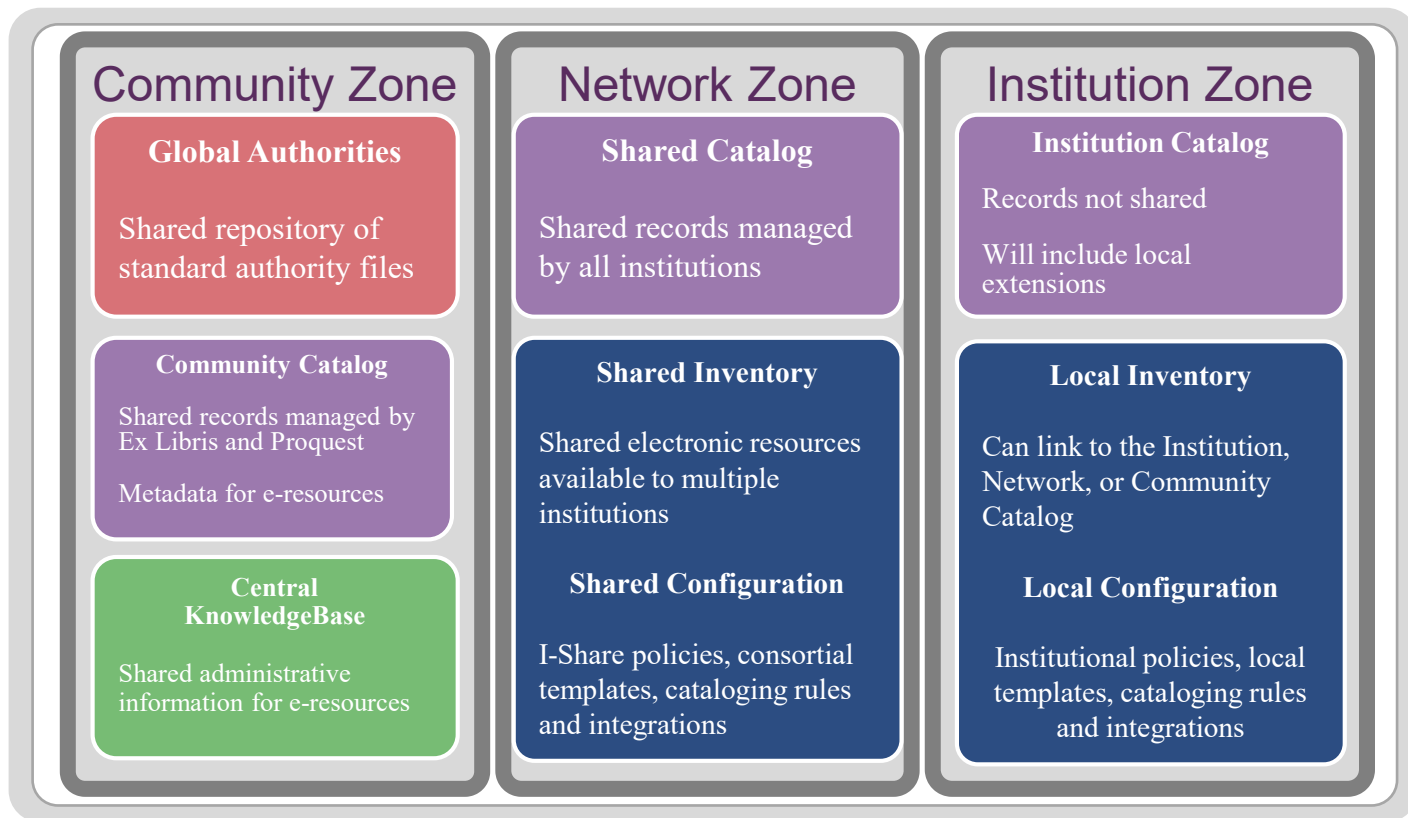
Along with the Alma and Primo VE software, Ex Libris provides:

- Alma online self-paced training
- Premium migration from Voyager to Alma
 - Includes acquisitions, course reserves
- Primo VE implementation with Alma
- Link resolver migration to Alma
- Alma workshops
- Third Party integrations setup support
 - E.g., Connections to student information systems, authentication services, self-check machines, external cataloging clients, and financial systems

Primo VE is integrated with Alma

- Unified back office management of the discovery system and Alma platform
- Real-time discovery of records managed in Alma and external repositories for all resource types
- Software-as-a-Service model includes monthly software releases for Alma and Primo VE simultaneously and eliminates the need for local PC client installation and maintenance





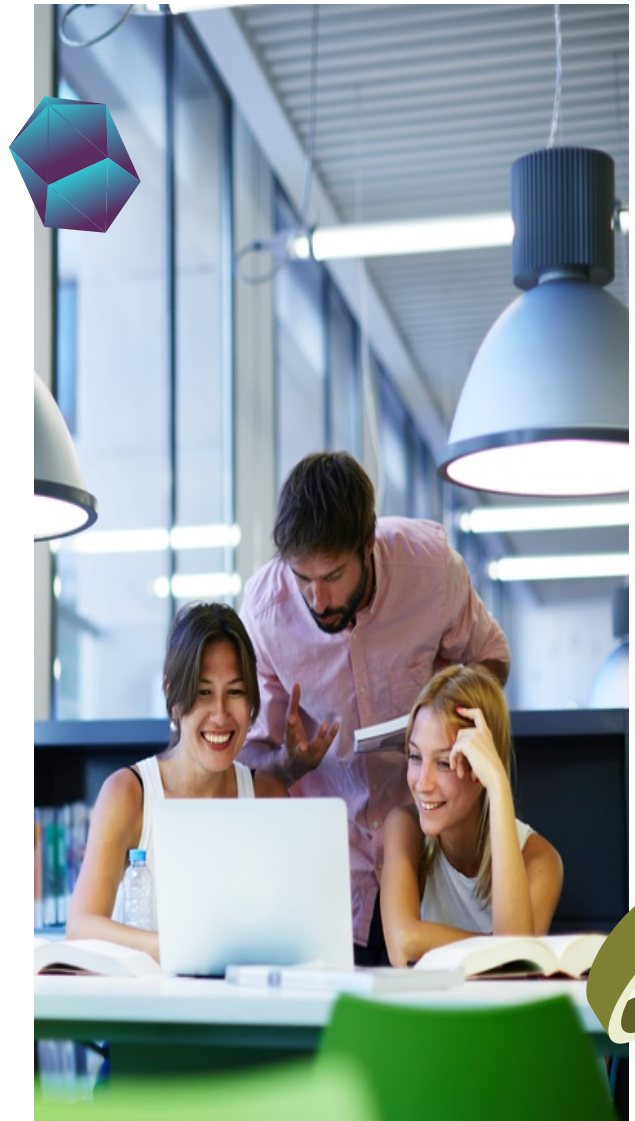


Project Timeline and Deliverables



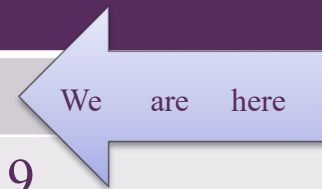
Onboarding and Vanguard Test Loads are Completed

- Onboarding phase: Ex Libris worked with CARLI staff to plan for the full project and to plan the Vanguard Test Load
- Five institutions served as “Vanguard” libraries: NBY, NCC, SIC, UIC, and UIU
- Thank you Vanguarders!
- We are now streamlining the migration process for all institutions based on lessons learned during the Vanguard Load
- These institutions and CARLI staff gained experience preparing and migrating data into Alma
- We have the benefit of 5 Institutional Alma environments with real data for data checking and functional testing



PROJECT MILESTONES: TEST LOAD AND CUTOVER

Milestones	Date
<u>Libraries Submit Migration Docs</u>	<u>July-September 2019</u>
CARLI Sends Data to Ex Libris	August-September 2019
Ex Libris Delivers Alma and Primo VE Test Load	October 2019
Test Period: Set up Authentication, User Management, configuration and “Day 1” integrations	October 2019 – April 2020
Production Load inputs due	May 2020
Alma Production Load (also known as “Cutover”)	June 2020
Data Checking and Fulfillment Reload	June 2020
Go-Live	June 24, 2020



Project deadlines and calendar at: <https://www.carli.illinois.edu/categories/alma-primo>

July 23, 2019

- [Alma Libraries spreadsheet](#)
Libraries return completed Alma Libraries spreadsheet to CARLI via Box.
- [Migration Form \(Printable Version\)](#)
Complete the [online version](#) and return via Box
- [Link Resolver Data migration:](#)
[Libraries using 360](#) share required data reports with CARLI
[Libraries using EBSCO or OCLC for link resolving](#) return completed Excel files
- [SFX libraries](#) complete active target review

Mid August 2019

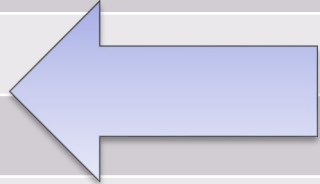
- CARLI provides the Ex Libris “Configuration Forms” to I-Share libraries. These worksheets are generated by Ex Libris from your completed Migration Forms, and some information you supplied in your migration forms will be pre-populated. These define many of the policies libraries will use for circulation, resource sharing and more

September 4, 2019

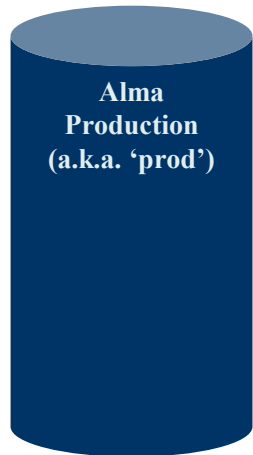
- Deadline for I-Share libraries to return their Configuration Worksheets to CARLI. These worksheets define the **initial configuration** when you receive your Alma Test Load.

PROJECT MILESTONES: TEST LOAD AND CUTOVER

Milestones	Date
Submit Test Load Data Inputs	July-September 2019
<u>Deliver Alma Test Load</u>	<u>October 2019</u>
<u>Deliver Primo VE Test Load</u>	<u>October 2019</u>
Test Load Period: Authentication, User Management, configuration and “Day 1” integrations	October 2019 – April 2020
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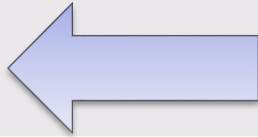
Alma and Primo VE Test Load will be delivered on the production environment



- Access granted to library staff after test load data is transformed and loaded into the environment
- Used for Alma data review and configuration testing
- Used for library staff training
- Data will be reloaded at cutover; **becomes true production environment at go-live**

PROJECT MILESTONES: TEST LOAD AND CUTOVER

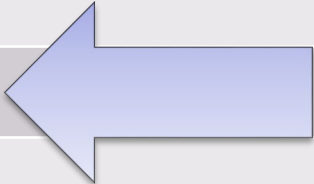
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- In October, each institution will receive a full test environment containing both Alma and Primo VE and all of your “real” data.
- From October-April you will work with CARLI and Ex Libris to test your data, train your staff, integrate 3rd party tools, review migration inputs and prepare your staff and users for the move to Alma and Primo VE.
- Integrations with institutional IT involvement: Authentication, SIS (User information Systems), financial, and printing must be set up and tested during this time.
- The Test Load is an opportunity to test "what would happen if..." with empirical results. Perfection is nice, but not our goal.

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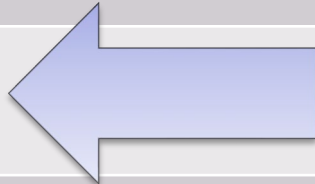


Spring 2020

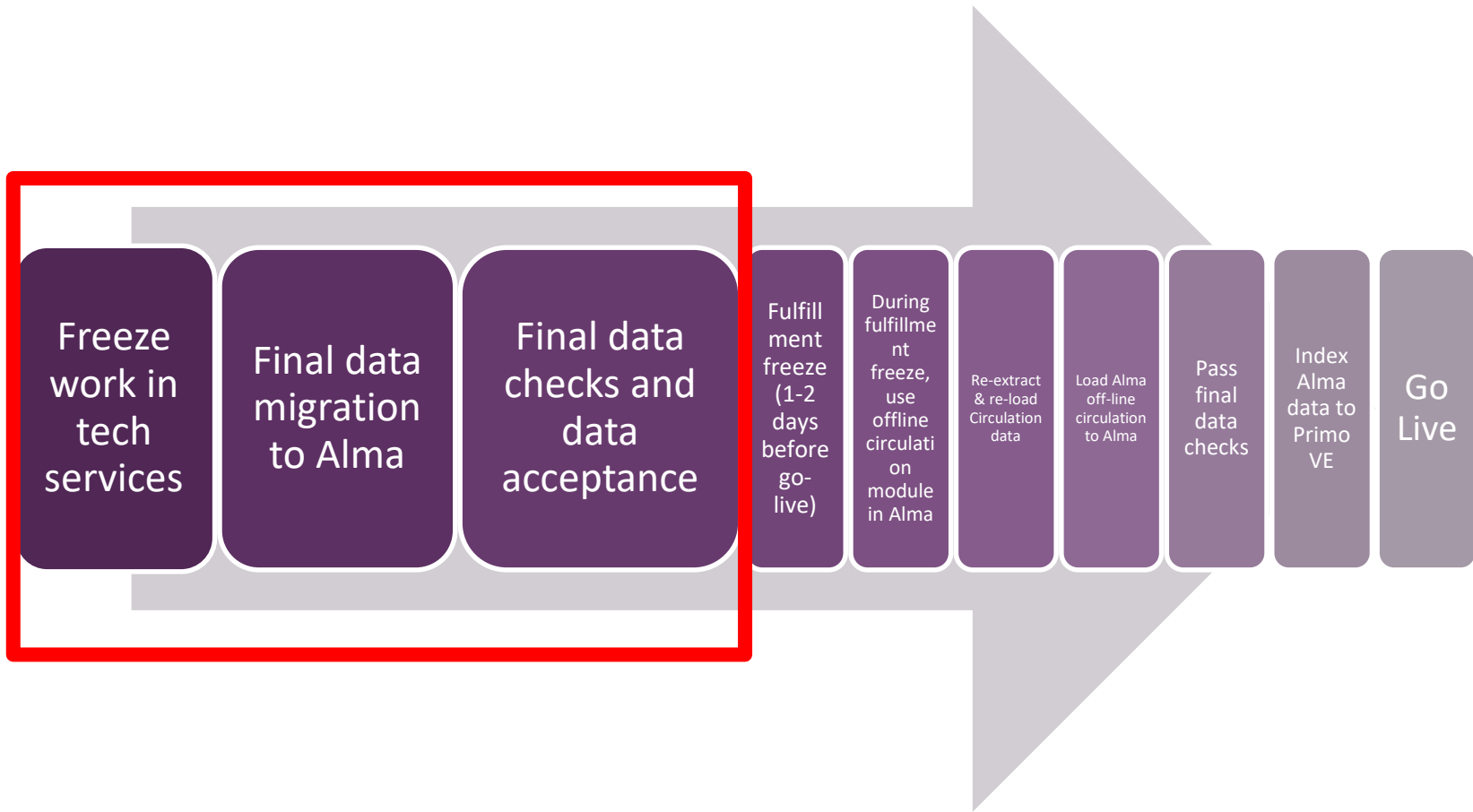
- Libraries will update migration, P2E and non-SFX link resolver forms
- CARLI prepares final data extracts from Voyager and SFX
- Everyone reviews and plans for cutover schedule, including informing all stakeholders (patrons, campus units, vendors)
- Begin informing content providers of upcoming change to your institution's base URL (for institutions currently using a link resolver)
- Review a *Go-Live Readiness Checklist* with the CARLI and Ex Libris project team prior to cutover start

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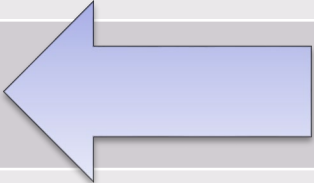


“Technical Freeze” is the first phase of the Production Load

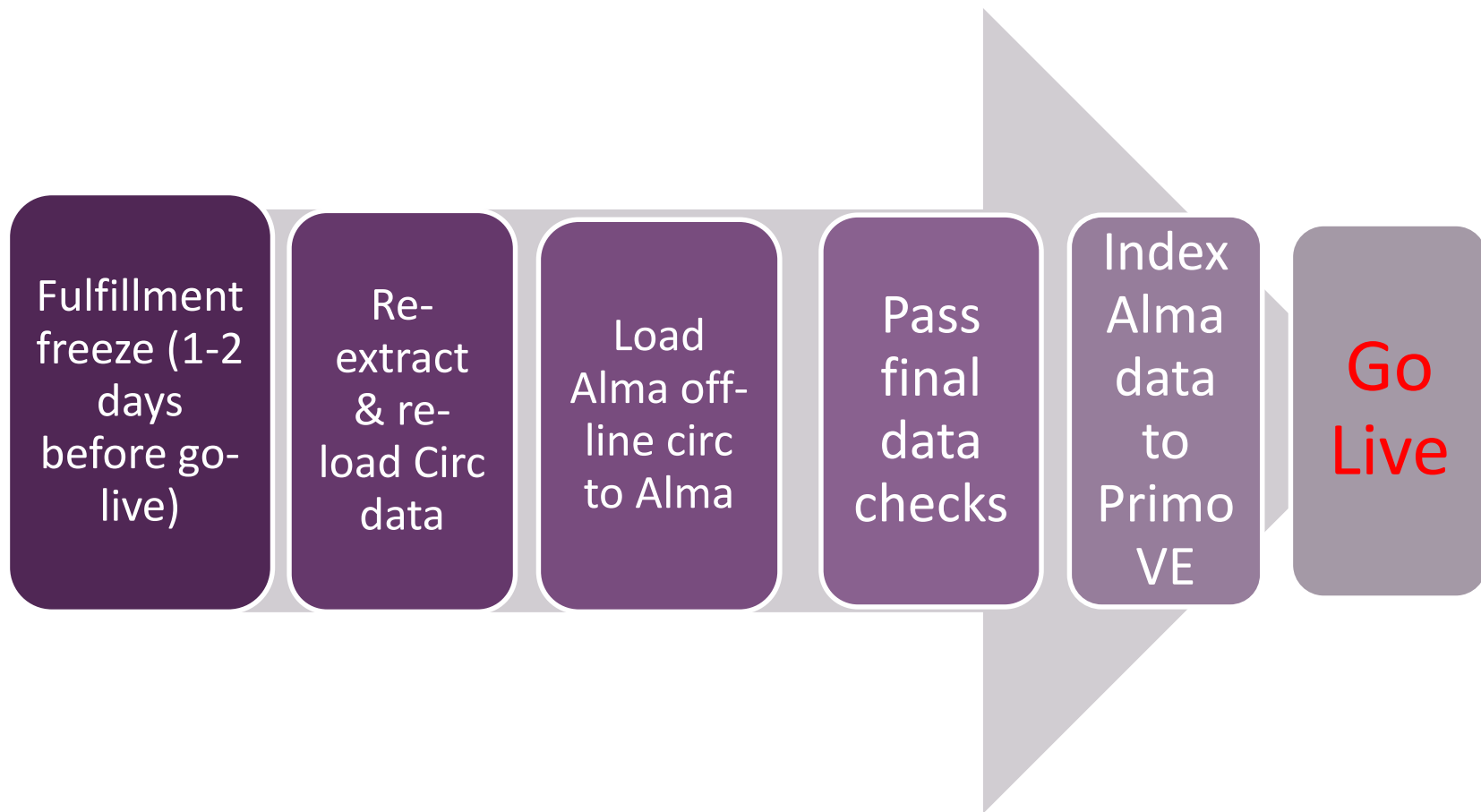


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Fulfillment Reload, then Go-Live for all 91 institutions on June 24, 2020



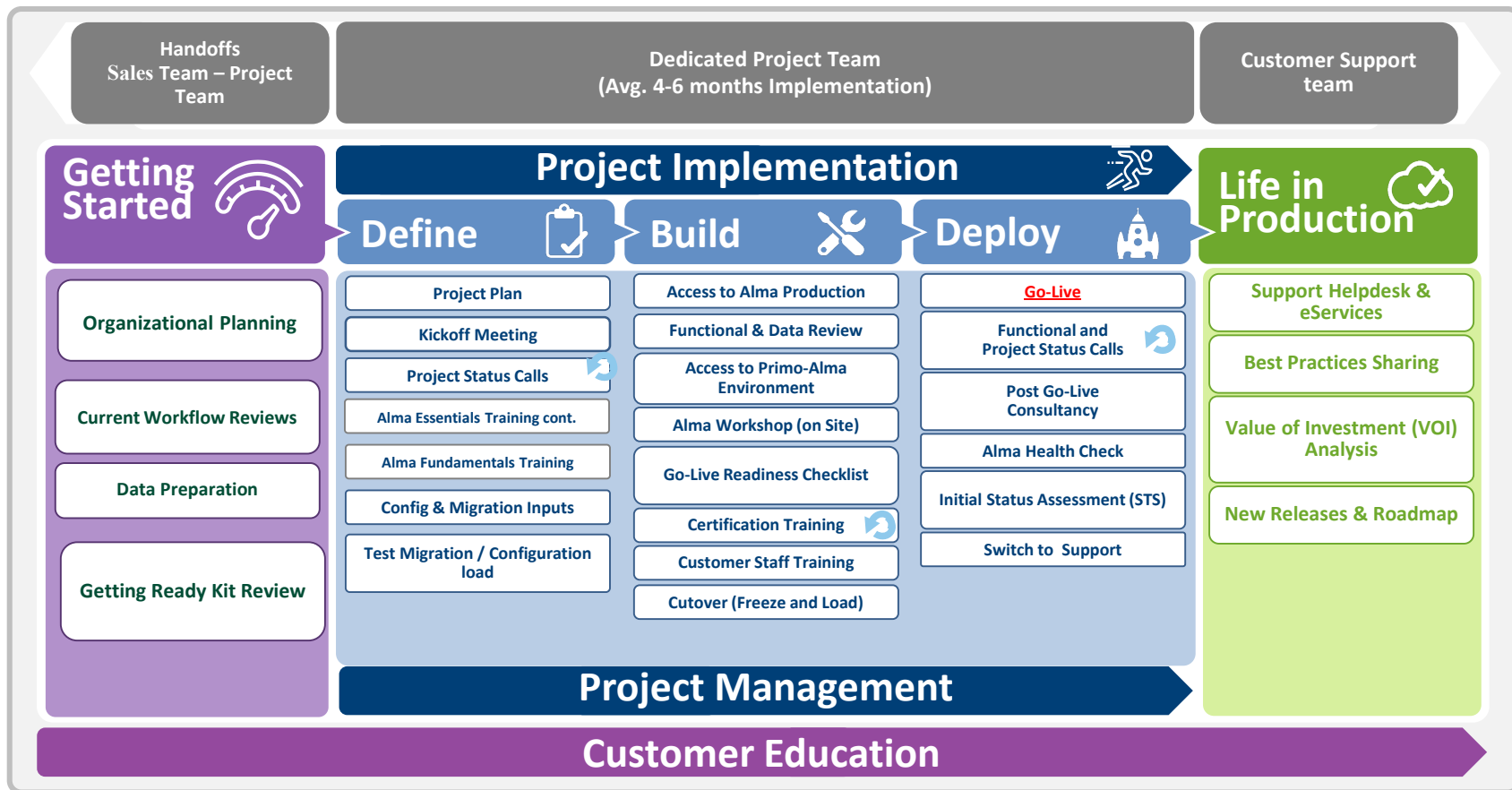
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- CARLI staff will still provide ongoing support to member libraries, including managing our consortial Alma Network Zone
- Ex Libris project team members will continue working with you to support your success in the new production system
- CARLI will freeze and ultimately turn off Voyager, SFX and VuFind. VuFind will not provide Alma discovery, for that you will use Primo VE
- [Alma and Primo VE Monthly software releases:](#) upgrades continue to expand and improve functionality without the need for periodic software upgrades like with Voyager
- Libraries and CARLI will continue to refine and learn how to take advantage of all Alma and Primo VE have to offer over time

EX LIBRIS' IMPLEMENTATION METHODOLOGY



PROJECT SCHEDULE AT-A-GLANCE

Onboarding			Complete
Vanguard Test Load		4/19-5/2019	Complete
Vanguard Planning and Testing		5/19-8/2019	Ongoing
Test Load Period			7/19-5/20
Production Load (Cutover)			 6/2020-6/2020
Go Live			 6/24/2020



CARLI Staff

- Project leadership along with Ex Libris staff

- Ongoing support, consultation, training

- Export data from Voyager and SFX

- Coordinate the I-Share Alma Network Zone and resource sharing

Ex Libris Project Staff

- Project management along with CARLI staff

- Data migration and cloud hosting

- Training and support

I-Share Libraries

- Completing migration forms

- Considering new options for data and workflows

- In-house staff and patron training

- Integrations with other “campus” systems (authentication, patron data, financial, etc.)

We hope you are already aware of these resources:

- CARLI's Alma Primo VE Webpage
<https://www.carli.illinois.edu/products-services/i-share/alma>
and Project Calendar
<https://www.carli.illinois.edu/categories/alma-primo>
- CARLI's Alma Primo Contacts email list
 - *The list is NOT limited to one person per institution*
- CARLI's "Office Hours" with Ex Libris at 2pm Thursdays
- CARLI's monthly online newsletter and web archive
- CARLI support support@carli.illinois.edu
- *Coming soon:* A "forum" on the CARLI website where I-Share library staff can chat about Alma and Primo VE topics

Important reminders about the Test Load

- Deadlines are firm and apply to all 91 libraries
 - Please let CARLI know *before* a deadline if your library is going to have trouble meeting it; we will help you, but we need time to be able to do so
- The Test Load is an opportunity to try things and experiment; you can change things again before we go live
- Plan to spend time reviewing your data once you get your test environment; use it for your staff training
- Use your test environment to test your setup (staff login roles, product integrations, Primo VE setup) while in test



Ex Libris Training Resources and Documentation



Ex Libris' Online Alma Essentials Training

Ex Libris' Online Extended Training

CARLI-customized Alma Webinars and
Implementation Training

Alma Functional Workshops
(Locations TBD around Illinois)

Alma Certification Training (for sys admins)

- [Alma Essentials Training](#) is online, self-paced and recommended to anyone new to learning Alma (can be started any time)
- [Extended Training](#) and other guides to advanced functionality and workflows in Alma
- [Alma Implementation Trainings](#) will be customized by Ex Libris and CARLI based on functionality and practices common to all I-Share libraries.
- [Alma Functional Workshops](#) will be conducted in person after Test Load delivery to all institutions.
- [Alma Certification](#) is self-paced and required for staff doing Alma and Primo VE configuration work and administration any I-Share institution. Ex Libris strongly recommends 2 staff certified per institution in addition to CARLI staff.

- CARLI and Ex Libris will provide webinars and regional workshops, but, due to our size and geographic distribution, each I-Share library will need to plan to do some training of front line staff during the test load period.
- The Test Load environments will serve as training environments. Library staff will have the opportunity to perform realistic training workflows with your actual data and your configuration choices.
- Workflows and training will be major topics during the Alma Functional Workshops and the customized Alma Implementation Trainings.



- **Ex Libris Knowledge Center**
 - <https://knowledge.exlibrisgroup.com/>
- **Product Documentation**
 - [Alma](#) and [Primo VE](#) product documentation
- **Project Documentation (Guides & Instructions)**
 - [Getting Ready for Alma Implementation](#)
 - [Alma Migration Considerations for Consortia](#)
 - [Technical Requirements](#)
 - [Migration Guides, Tutorials and Specifications](#)

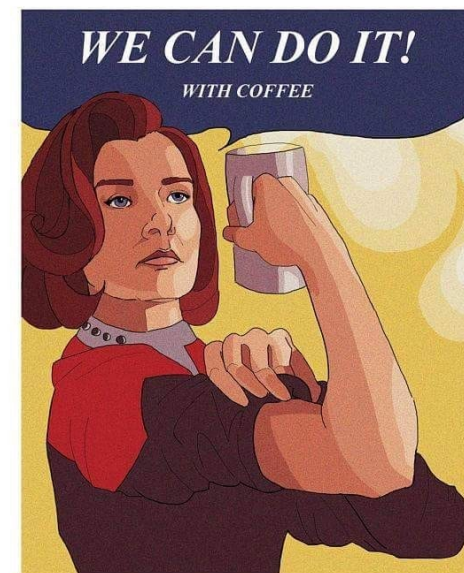
Remarks from Belinda Cheek, North Central College

Tips from our Vanguard experience:

- Set aside time each week for this work – we worked as a group and found that to be helpful
- Stay informed – make use of all of the resources that CARLI and Ex Libris are providing
- Try to complete the training modules as soon as possible; completing Alma Certification will also be an important step for most libraries
- CARLI staff are there for you! They are an awesome support – don't hesitate to ask for help

To Recap...

- Alma and Primo VE will be transformational in how we work as libraries and as a consortium; this is not just a new Voyager
- Start learning about and planning for Alma and Primo VE now!
- The test load period is a great opportunity for experimentation and trying new things, ruling some things out, and trying other options
- System migration is complex work, pace yourself and be kind to yourselves and each other. Don't hesitate to ask CARLI for help, this is new to all of us in I-Share and CARLI
- I-Share libraries are stronger together, not just in our collections but also in our collaboration and experience, we can do this together and do it well!



Thank you!

Questions from chat (as time permits)

You can always contact CARLI at support@carli.Illinois.edu