

I-Share's 2020 Vision: A Brief Look at Some of the Changes Coming with Alma and Primo VE (SCE 605)  
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Kristine Hammerstrand presented a high-level overview of the upcoming migration, Alma, and Primo VE

#### The Who, What, and When

- All 91 I-Share libraries are moving from Voyager and VuFind to Alma and Primo VE
- Testing is underway for 5 vanguard libraries
- Testing for all 91 libraries will begin in fall 2019, with a go-live date of summer 2020
- Unlike Voyager, which was designed for managing print only, Alma and Primo VE enable easier managing and discovering of both physical and electronic resources, as well as consortial resources
- Both Alma and Primo VE are web-based

#### Alma

- A "unified resource management system"
  - Intended to manage resources of multiple types
  - Replaces any link resolvers and other e-resource management systems libraries are using
  - A cloud-hosted service (i.e., "it's somebody else's computer")
- Supports local and consortial functionality we're used to
- Built-in support for consortial resources, policies, settings

#### Primo VE

- Includes real time status information from Alma
- Uses the same configuration setup components as Alma (Configuration = Voyager SysAdmin)
- Provides discovery of library and consortial physical and e-resources, reserves, links to other ILL services
- Primo VE is included at no extra cost

#### Alma & Primo VE "Zones"

- All customers share access to a "Community Zone" that has a central knowledge base containing metadata for e-resources and details about e-resources packages' content (analogous to OCLC Connexion)
- Consortial customers like CARLI can implement a "Network Zone," analogous to the Universal Catalog. The Network Zone includes the opportunity to activate resources we all have (e-book packages), share policies, etc.
- "Institution zone" where you keep the "inventory" -- holdings, status info, etc.

#### Timelines

- Onboarding phase January-February 2019 (COMPLETED)
  - Defined scope and basics
- Vanguard phase March-July 2019 (ONGOING)
  - 5 institutions will do a rapid test implementation of Alma and Primo VE
- Full test implementation July 2019-March 2020
  - A test implementation for all 91 libraries
  - Creation of a full test database for each library
  - Set up Primo

- This is the time to make any changes, train staff, etc.
- Production data migration April-June 2020
- Go live June 2020

#### Vanguard phase

- Libraries volunteered, these were selected because of their diversity of collection, size, systems:
  - NCC, NBY, SIC, UIC, UIU
- Vanguard libraries are working with CARLI staff to pilot the full consortial data migration, configurations and workflows

#### Fall 2019

- CARLI and Ex Libris will work with all I-Share libraries to copy data from Voyager to SFX
- Libraries will have a **full copy of their data** in an Alma Primo test environment to use for testing and staff training

#### Go live on Alma and Primo VE

- Tentatively scheduled for June 24, 2020
- Voyager will be "frozen" (no changes) and ultimately cut off
- VuFind will be turned off, libraries will switch to Primo VE
- There will be no "chopping up" of libraries; all libraries will migrate and go live at the same time
- Intend to keep a static version of Voyager for a bit

#### Collective history of change: we CAN do this!

- Implemented Voyager in 2002 for 44 libraries
- Summer 2020: 40th anniversary of resource sharing

#### 4 Basic areas of change

- Hardware
  - Scanners, computers, self-check machines will work
  - Desktops don't need to be Windows PCs
  - Options to use tablets
  - Printing is different: printers are e-mail addressable (see handout!)
- Software
  - Every Alma customer is on the same software version at all times. It's cloud hosted, multi-tenant; monthly updates
  - Web-browser based, no Windows clients to load and manage
  - Network zone
- Data
  - "MARC's not gonna die before 2020"
  - Network zone is more than a union catalog
  - E-resources are activated rather than loading bibs or using link resolver access
  - Patron data and staff logins will typically be authenticated against campus services
- People
  - Patrons can still place requests, view their account activity
  - CARLI staff will still provide ongoing support
  - Patron & staff authorization works with campus identity services
  - Staff privileges are role-based, a staff members' privileges can include one or more roles
  - **Training is largely online and self-paced**
    - Different levels of training (see Handout!)

#### What to expect during a data migration

- Most Voyager and VuFind functionality will continue to be available until we have to take the final "snapshots" of data to move to Alma in Spring 2020
- We will set dates beyond which you will not want to/be able to do tasks in Voyager as that work will not be transferred to Alma
  - Acq and cataloging in voyager will cease
  - New UB requests will cease
  - New local circulation will cease (and you will use the offline circ option)

#### Money

- Annual consortial Alma & Primo VE license fee we will pay to Ex Libris is set for next 10 years
- Our Ex Libris contract has an annual price increase cap of 3%
- I-Share assessments have been set for the next several years and are posted on the CARLI website

#### What your library *should* be doing now

- Data cleanup
  - Refer to the cleanup priorities on the CARLI website, some are more critical than others, as indicated
  - Run reports to see what and how much cleanup is needed
- If you (and colleagues and predecessors) have followed data standards and best practices, you won't have as much cleanup to do
- If you have non-standard local practices, REACH OUT TO CARLI

#### What you can be doing now

- Start getting familiar with Alma and Primo VE
- Decide who will be training leaders
- Ex Libris requires trainings for those doing configuration; they need to be "certified" (access to SysAdmin side of the house)
- Know what systems and products currently interact with Voyager at your institution
  - Student data, billing, electronic ordering
- Start thinking about authentication method(s) your institution can use for Alma and Primo VE
  - See technical resources referenced on the handout
- Start making time NOW for your Alma and Primo VE training and planning work