I-Share's 2020 Vision:
A Brief Look at Some of the Changes Coming with Alma and Primo VE

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At the CARLI
Change is Good Forum

April 2, 2019

Please Note: This Presentation is an overview; It is *not* Alma or Primo VE Training !

- Most Alma and Primo VE training is online and self-paced
- Refer to the handout, the CARLI website, and the Ex Libris Knowledge Center regularly for the best information on implementing and using Alma and Primo VE
- Don't wait, you can start learning about Alma and Primo VE now

Who, What, When, Where...

- Who: All 91 I-Share institutions
- What: Moving from Voyager and VuFind to Alma and Primo VE
- When: Testing beginning now for 5 Vanguard (pilot site) libraries, testing for all 91 to begin fall 2019, all 91 I-Share libraries move to Alma and Primo VE in June 2020
- Where: Alma is "cloud" hosted by Ex Libris; used by libraries all around the world

…and…

…And Why?

- Voyager is aging, and was designed for managing print resources only
- 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
- Alma and Primo VE are web-based, no loading and managing Windows client software
- Many more reasons than can fit on a slide!

A Bit About Alma

- It is referred to as a "unified resource management system"
  - Designed to manage e-resources as well as physical resources
  - Replaces any link resolvers (e.g., SFX) and other e-resource management systems libraries are using
- It is also referred to as a "library services platform"
  - "Cloud" hosted software and data
- Supports the "local" and consortial functionality we have in Voyager
  - Union catalog view
  - Resource sharing (remote and onsite, like UB)
- Built in support for consortial resources, policies, settings

A Bit About Primo VE

- Ex Libris recently re-designed their Primo discovery service and rebranded it as Primo VE
  - Includes real time status information from Alma
  - Uses the same configuration setup components as Alma
- Primo VE provides discovery of library and consortial physical and e-resources, reserves, links to other ILL services
- We did not set out to buy a public-facing discovery interface; the plan was to continue to support VuFind
- Included in our Alma purchase, will replace VuFind when we go live with Alma in June 2020
- No extra charge to I-Share libraries for Primo VE

Alma and Primo VE "Zones"

- All customers share access to a "**Community Zone**" that has central knowledge base that contains metadata for e-resources and details about e-resource packages' content

- Consortial customers like CARLI can implement a "**Network Zone**" where consortial collections, policies, and more can be managed

- All customers have their own library's inventory (physical holdings), staff users, and local policies in an "**Institution Zone**"

Our Project Phases and Timeline

- Onboarding phase January-February 2019
    - Define the project scope and basics
    - *COMPLETED*

- Vanguard phase March-July 2019
    - 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

- Production data migration April-June 2020

- Go live on Alma and Primo VE June 2020

Vanguard Phase, March-July 2019

- Five institutions will do a rapid data migration and setup
  - NCC, NBY, SIC, UIC, UIU
- Libraries volunteered, these were selected because of their diversity of collection, size, systems
- They are working with CARLI staff to pilot the full consortial data migration, configurations and workflows
- In addition to Voyager data, the Vanguards are testing migrating their e-resource management data from various systems
- A test Alma Network Zone (union catalog and consortial services) will be built from these five libraries' data

Test Data Migration for all 91 Institutions

- Fall 2019, CARLI and Ex Libris will work with all I-Share libraries to copy data from Voyager and SFX

- Libraries will have a full copy of their data in an Alma Primo test environment to use for testing and staff training

- Libraries will want to use this test environment to plan their integrations such as importing patron data, printing setup, other add-on's such as self-check systems, etc.

- Libraries that use e-resource systems other than SFX will test exporting and loading those data

Go Live on Alma and Primo VE

- Tentatively scheduled for June 24, 2020
- Voyager will be "frozen" (no changes) and ultimately turned off
- VuFind will be turned off, libraries will switch to Primo VE

Our Collective History of Change:
We CAN Do This!

- We implemented Voyager in 2002 for 44 institutions. Since then 47 more institutions have moved to I-Share from other systems.

- Were you on staff when your library implemented Voyager? Or perhaps even when we implemented our previous shared systems, DRA, and the original system, LCS?

- Have you worked at other libraries that used library management systems other than Voyager?

- Have you worked with Alma and/or Primo VE in other libraries?

Four Basic Areas of Change

- Hardware
- Software
- Data
- People

Hardware (Computers, scanners, printers…)

- What is not changing
  - Keep your desktop computer, scanner
  - Self check machines will work

- What is changing
  - Desktop computers do not need to be Windows PCs
  - Options to use tablets (e.g., Ipads) for mobile staff work, e.g., paging requests, inventory work
  - Printing will be an email-based process
    - Read about this in the Ex Libris Knowledge Center and start planning

Software

- What is not changing
  - Alma and Primo VE are ProQuest Ex Libris products

- What is changing
  - Every Alma customer is on the same software version at all times
    - Cloud hosted, multi-tenant
    - Monthly updates
  - Web-browser based, no Windows clients to load and manage
  - Alma has a "Network Zone" that offers a variety of consortial services-not just a union catalog or resource sharing tool

Data

- What is not changing
  - MARC data for bibs and holdings

- What is changing
  - 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

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 offine circ option)
- Data from Voyager will be loaded into Alma, we will verify that all data moved, upload the offline circ, and go live on Alma !

People

- What is not changing
  - Patrons can still place requests, view their account activity
  - CARLI staff will still provide ongoing support to member libraries

- What is changing
  - Patron and library staff authorization works with campus identity services
  - Staff privileges are role-based, a staff member' privileges can include one or more roles
  - Training is largely online and self-paced
  - CARLI will have a large, but limited, number of staff user accounts for libraries, so we will more actively encourage libraries to delete unused staff logins

A Bit About the Cost

- The annual consortial Alma and Primo VE license fee we will pay to Ex Libris is set for the next ten 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 are not comfortable with Voyager reports, ask CARLI for help
- If you (and your colleagues and predecessors) have followed data standards and best practices, you will not have as much cleanup to do
- If you have used non-standard, local practices; discuss these with CARLI for recommendations

What your library *can* be doing now

- Start getting familiar with Alma and Primo VE
  - All Ex Libris training is online and open; you can start learning now
  - Refer to your handout for descriptions and links
- Decide who on your staff will be your training leaders
- Ex Libris requires staff that will do "configuration" work to complete their "certification" program (also online)

What your library *can* be doing now

- Know what systems and products currently interact with Voyager at your institution
  - Student data, billing, electronic ordering
- Start thinking about what authentication method(s) your institution can use for Alma and Primo VE
  - See the technical resources referenced on your handout

Start making time *now* for your Alma and Primo VE training and planning work