



CARLI Annual Meeting 2019

IMPLEMENTING ALMA: BEYOND THE FORMS

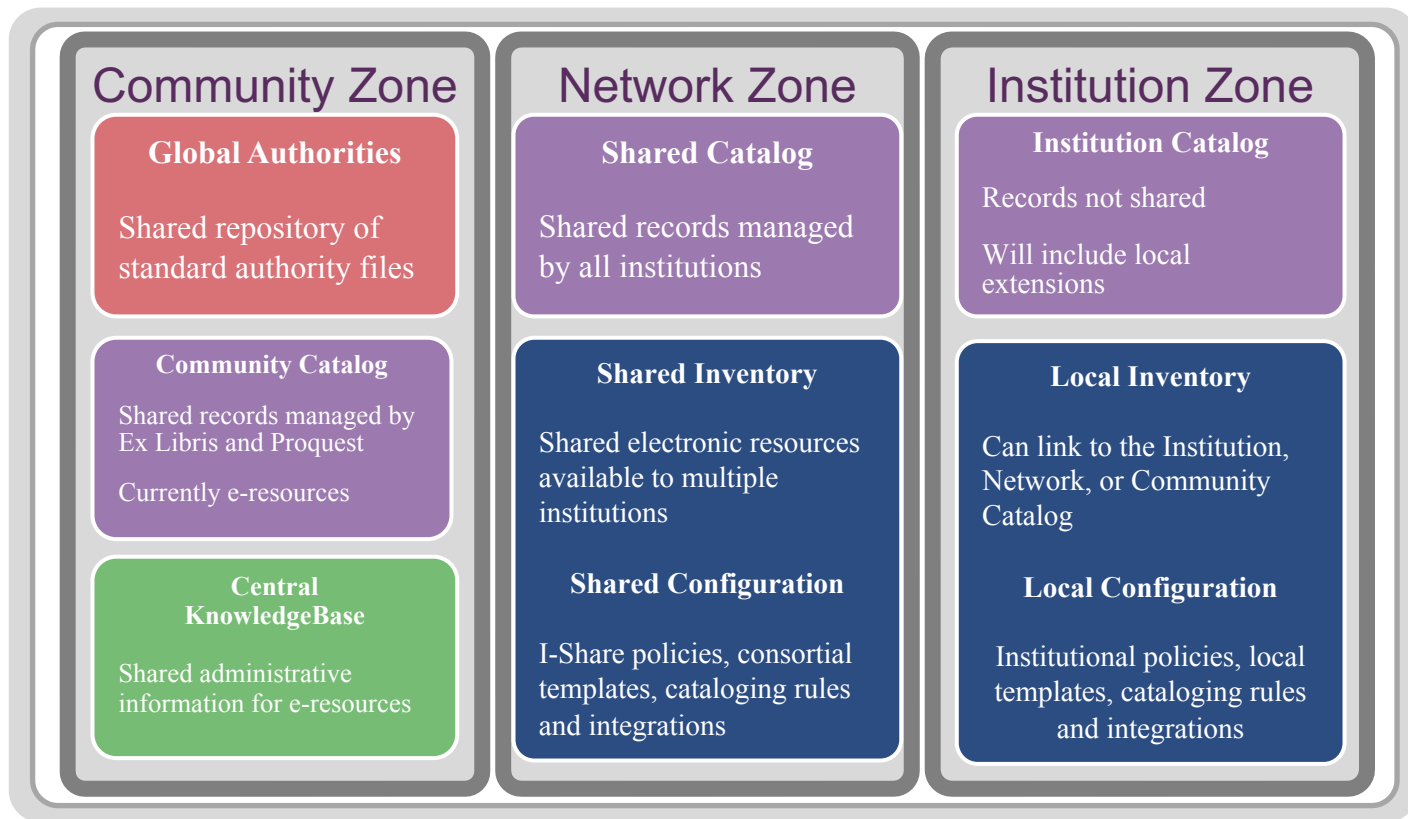
November 15, 2019

- This is a *brief* look at where we are in the Alma Primo VE migration and a look ahead at the tasks remaining
- This is *not* training. I will not be providing “how to” instructions
- Rather, this presentation should provide a sense of our progress and an overview of work yet to come
- For in depth information about our project, refer to the [CARLI website](#) and to the [Ex Libris Knowledge Center](#) for Alma and Primo VE documentation

- Alma provides integrated physical and electronic resource management
- Primo VE provides discovery for the library's catalog of physical and electronic resources, as well as consortial resources and resource sharing
- CARLI will be able to provide more consortial services through the Alma Network Zone
- Primo VE includes a Central Knowledge Base of e-resource packages and authority records
- Alma and Primo VE are web-based, no loading and managing Windows client software

What is included with Alma

- Library services platform
 - Manages physical and electronic inventory
 - Institutional Zones (IZ) for institution-specific data
 - Network Zone (NZ) for data in common for the consortium
 - Community Zone (CZ) for data for all Alma customers
 - Knowledge base for e-resource management and link resolver functionality
- In addition to resource management (i.e., cataloging) and fulfillment (i.e., circ/resource sharing) all I-Share libraries have access to Alma's acquisitions, e-resource management, reserves functions, at no extra cost even if they don't use them now in Voyager



What is included with Primo VE?

- Catalog and e-resource discovery for your Institution Zone
- Patrons' view of their account
- Patrons' ability to place requests (as allowed), renew materials
- Union catalog view of I-Share libraries' holdings
- Consortial resource sharing for patrons
- All I-Share libraries have Primo VE at no extra charge
- Primo VE will replace VuFind

- We have met all project deadlines so far!
- We are on schedule to meet our June 24, 2020 Go Live date
- It seems like we have a lot of time before Go Live but we are 91 diverse institutions, we are all still new to Alma and Primo VE, and there is still much work to be done

Milestone	Dates
Contract signing	January 2019
Onboarding phase	January-February 2019
Vanguard phase	February-July 2019
All 91 libraries complete migration & configuration forms	July-September 2019
CARLI sends test data to Ex Libris	August-September 2019
Ex Libris creates 91 Alma test environments	September-October 2019
Libraries have view only access to test environments	October 23, 2019
Libraries with Alma-certified staff gain access to their Alma configuration settings	November 6, 2019

BUT THERE IS A LOT OF WORK YET TO BE DONE

Milestone	Dates
I-Share libraries get access to Primo VE	November TBD
Test phase: Library staff review data and configuration settings, set up patron data integration, authentication, printing, other <i>essential</i> “Day 1” integrations (services you connect to with Voyager)	November 2019 – March 2020
Libraries provide revised migration forms and P2E’s	Spring 2020 TBD
CARLI extracts (again) data from Voyager and SFX	May 2020
THE VOYAGER “TECHNICAL FREEZE”	Extract date through Go Live
CARLI sends production data to Ex Libris	May 2020
Ex Libris loads production data	June 2020
CARLI sends updated circ status and patron data to Ex Libris	About June 18, 2020
Go-Live on Alma and Primo VE for all 91 libraries	June 24, 2020

← We are here

- Test environments ARE NOT sandboxes
 - Sandboxes are generic data for trying things out
 - Test environments are your data will become your REAL Alma environments
- These are full copies of your Voyager and link resolver (if applicable) data from August 2019
- The data is static unless you change it (or as circ transactions age into overdues, etc.)
- You can and should use your test environment to review data, test your policies and configurations, test staff user roles, and setup and test integrations
- Policies will persist from test to production

- Each institution received a full Alma IZ test environment on October 23 in read-only mode; as of November 6, libraries with Alma-certified staff gained the ability to set up staff users and revise configuration settings
- Now-March, library staff review data and configuration settings, train staff, integrate 3rd party tools
- Integrations with other services: Authentication, SIS (Student Information Systems), and printing must be set up and tested between now and March
- If you send data to and from financial systems (fines, billing, invoices, etc.) setup and test those during the test phase; if you don't do this now, wait to start in Alma

Alma and Primo VE Monthly Release Schedule – 2020			
Monthly Release	Sandbox Release	Production Release	Release Update
January 2020	December 15, 2020	January 5, 2020	January 12, 2020
February 2020	January 19, 2020	February 2, 2020	February 9, 2020
March 2020	February 16, 2020	March 1, 2020	March 8, 2020
April 2020	March 22, 2020	April 5, 2020	N/A (Infrastructure Release)
May 2020	April 19, 2020	May 3, 2020	May 10, 2020
June 2020	May 24, 2020	June 7, 2020	June 14, 2020
July 2020	June 21, 2020	July 5, 2020	July 12, 2020
August 2020	July 19, 2020	August 2, 2020	August 9, 2020
September 2020	August 16, 2020	September 6, 2020	September 13, 2020
October 2020	September 20, 2020	October 4, 2020	N/A (Infrastructure Release)
November 2020	October 18, 2020	November 1, 2020	November 8, 2020
December 2020	November 22, 2020	December 6, 2020	December 13, 2020

Ex Libris is releasing a new Central Discovery Index in early 2020

- We will have access to the new CDI in February
- Single activation to publish content to users
- Faster content update cycles (including new content)
- Daily rights update for all customers (electronic holdings)
- Expanded content coverage
- Enhanced performance

Improved Metadata Editor User Interface & Workflows

- Easy to use navigation tree with all the relevant actions
- Main menu organized by entities and aligned with the navigation tree
- Consistent split screen behavior with better workflows
- Improved inline editing
- Ability to add a new item based on defaults or existing items
- Ability to update a list of items with the same change in a single action

Linked Data

- Linked Data - Basic Record Editing (e.g. BIBFRAME)
- Uploading, managing relationships and publishing (e.g. BIBFRAME)

Improvements to Electronic Activation Task

And more

Ex Libris' Online Alma Essentials Training

Ex Libris' Online Extended Training

CARLI-customized Alma Webinars and Implementation Training

Alma 2-Day Functional Workshops
(Locations around Illinois, Oct-Feb)

Alma Certification Training (ongoing)

- [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 can be found [here](#)
- Ex Libris is now offering a customized set of Implementation webinars
 - *These sessions are live and available as recordings*
- Alma 2-day Functional workshops are being held around the state from October through February
- [Alma Certification](#) is self-paced and required for staff doing Alma and Primo VE configuration work

- Four two-day Ex Libris-led in person training sessions this fall
 - Serving 162 people from 71 institutions
- Six more two-day Ex Libris led sessions in planning for January and February
 - Jan 14-15 NIU, DeKalb
 - Jan 16-17 Parkland College, Champaign
 - Feb 4-5 Monmouth College, Monmouth
 - Feb 6-7 TBD
 - Feb 25-26 TBD
 - Feb 27-28 TBD

- Each I-Share library will need to plan to do some staff training as well as training student workers
- The test environments serve as your training environments where you can execute realistic workflows with your actual data, your staff logins, and your configuration choices

- Ex Libris' standard practice is to restrict access to Alma configuration settings to institutions that have at least 2 staff that have passed their online Alma certification training
- Currently, 51 I-Share libraries have a total of 106 certified staff
- If you don't have Alma-certified staff, CARLI staff can and will continue to assist you with configuration changes
- No fixed deadline on having Alma-certified staff at every I-Share library, but now that test environments are available there is more incentive

- Data review in your test environment
- Configuration testing, e.g., Fulfillment Configuration Utility
- Staff training
- Planning for patron data updates
- Planning for printing from Alma
- Planning for user authentication
- Testing integration with other services and products you now use with Voyager, e.g., self-checkout stations
- Planning for PR

- Alma requires a different, XML-based format for patron data, rather than the Voyager “SIF” file
- Alma is designed to be able to synchronize data from a campus student information system (“SIS”) on a schedule of your choice
- CARLI has identified several SIS systems in use by our members including
 - Banner
 - Colleague
 - Jenzabar
 - PeopleSoft

- CARLI is working on pilot projects for each of the major SIS products our members use
- In November - January, pilot sites will work with CARLI to get data from their SIS and update the patron data in their test environments
- Pilot sites will help CARLI document the process used with their SIS
- CARLI and Ex Libris expect all libraries that plan to use this service to run a successful patron update in their test environment in February-March
- We will do a final export of patron data from Voyager just a few days before we go live on Alma, so your initial patron file in Alma will be a starting point

- Alma and Primo VE do not store passwords
- Customers are expected to use an identity provider service, such as a campus single sign-on service, to authenticate to Alma and Primo VE
- CARLI is looking into a consortial option for institutions that do not have an identity provider in place. We will update you as soon as we know more.

- Libraries update migration, P2E, and non-SFX link resolver forms as needed
- Ex Libris provides, and everyone reviews the 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)
- CARLI prepares final data extracts from Voyager and SFX

- Your Test environment *becomes* your production environment
- It will become unavailable in late spring when it is being refreshed; this is why we need to do integration work early
- These data and settings remain from Test to Production:
 - Libraries
 - Locations
 - Vendor records
 - Configuration/policy settings
 - Integrations with SIS, authentication, self-check, etc.
 - Primo VE configurations
 - Staff users

These are all *replaced* with a fresh copy of data when Test becomes Production

- All NZ data
- All IZ bibliographic data, holdings, and items
- All circ status data
- All reserves
- All acq data
- All patrons (but not staff users)
- All link resolver data being migrated

Between Test and Production comes the FREEZE !



- Just before CARLI begins to export data for the production load, library staff must stop technical service work in Voyager (acq, ser, cat) and link resolvers
 - Any adds, changes or deletes to bibs, items, holdings, PO's, funds, etc. in Voyager or your link resolver after the Freeze will NOT be moved to Alma/Primo VE
 - If you must make a change after the Freeze, you must keep a record and re-do the work in Alma after Go Live
- Circ and patron data work can continue in Voyager up until CARLI extracts the “Fulfillment top off data” a few days before Go Live

- Your Alma test environment will not be available as it is being reloaded with new data; but sandboxes will be available
- Review Ex Libris and CARLI online training materials; sandboxes *will* be available for use
- Update your library website with any Alma-related changes
- Physical collection work (e.g., shelf reading, shifting, etc.)
- Professional development activities
- May be a good time to take a few days off
- Watch for suggestions from the CARLI Technical Services Committee soon

- Final data checks
- Upload offline circ transactions
- Check access to electronic resources
- Inform your campus community
- More, as we learn and add to this list

- Primo VE setup
- Union catalog view in the Network Zone
- Network zone bib record setting options for local data fields
- Letters, (i.e., notice text and output)
- Your third-party product integrations (e.g., self-check)
- CARLI Resource Sharing via the Alma Automated Fulfillment Network (AFN)
- ILLINET borrowing
- Harvesting of CARLI digital collections

- CARLI will freeze and ultimately turn off Voyager, SFX and VuFind
- CARLI staff will still provide ongoing support to member libraries
- Ex Libris project team members will continue working with us to support your success in the new production system
- Libraries and CARLI will continue to refine and learn how to take advantage of all Alma and Primo VE have to offer over time

- Focus on the “Day One” essentials
- If you don’t use a functionality in Voyager now, you don’t need to start using it Day One in Alma
 - “Just because you can; doesn’t mean you should”
- Don’t forget the monthly Alma and Primo VE software updates, watch the release notes and CARLI notifications
- Remember your patrons, this is all ultimately for their benefit

- [Ex Libris Knowledge Center](#)
- CARLI's Alma Primo VE Webpages and Calendar
- CARLI's Alma Primo Contacts email list
- CARLI's monthly online newsletter
- CARLI's weekly open office hour webinar and recordings
- CARLI support support@carli.illinois.edu

THIS IS AN OPPORTUNITY FOR TEAM BUILDING

- This period of transition offers opportunities to bring library staff together in different combinations and settings than usual--for planning, training, project updates, etc.
- Working together can reduce stress, build teams, we learn from each others' questions and ideas
- Share your ideas with other I-Share libraries
- Join a CARLI working group
- Host a training or an open house with your neighbor institutions

Thank you!

Contact CARLI at support@carli.illinois.edu