CARLI Alma Primo VE Migration Project
Status Report to the CARLI Board of Directors, September 13, 2019

CARLI's Ex Libris Alma Primo VE migration project has three major phases as defined by Ex Libris:

Onboarding	January 2019 - February 2019
Vanguard	March 2019 - June 2019
Full Test and Implementation	July 2019 - June 2020

Phase 1: Onboarding Phase (completed February 28, 2019)

During the Onboarding phase, CARLI and Ex Libris refined the scope of the project and prepared for the Vanguard phase. For a summary of the accomplishments during the Onboarding phase, see the March 8, 2019 CARLI Alma/Primo VE Migration Project Status Report to the CARLI Board of Directors.

Phase 2: Vanguard Phase (March 5, 2019 – June 27, 2019)

During the Vanguard phase, CARLI, the Vanguard libraries (NBY, NCC, SIC, UIC, and UIU), and Ex Libris did a rapid data migration of the full set of Voyager and e-resource management data for the five institutions. These Vanguard test environments reflect each library's "real" data and their own migration decisions and configuration settings. An Alma Network Zone for consortial data and resource sharing has also been setup as part of the Vanguard phase. The five Vanguard library and Network Zone test environments will remain in place until the test environments are delivered in approximately mid-October 2019.

For a summary of the accomplishments during the Vanguard phase, see the June 14, 2019 CARLI Alma/Primo VE Migration Project Status Report to the CARLI Board of Directors.

Addendum on the Vanguard Phase: As of this writing, September 12, 2019, the five Vanguard environments are being decommissioned by Ex Libris so that they may be replaced by these five libraries' test environments.

Phase 3: Full Test and Implementation Phase (July 11, 2019 – June 24, 2020)

The Test Phase focuses on building a full test environment for each of the 91 I-Share libraries and a consortial Network Zone. Ex Libris is currently building the test environments and expects to deliver them in early to mid-October, 2019. The test environments include all data from each institution's Voyager database plus any e-resource data the library chose to migrate. Test environments will remain in place for the 91 institutions until the final production data loads begin in May 2020. During the approximately 6-7 months that the test environments are in place, I-Share libraries will be able to use these data for staff training as well as for testing and adjusting their configuration settings, workflows, and third-party integrations (e.g., authentication, printing, self-check stations, and more).

The following work has been completed for this phase of the project:
- Library staff completed a worksheet indicating which of their Voyager locations have been used for e-resources. The worksheet was due June 4, 2019. CARLI staff used this information to create reports of bib records in these locations for library staff to review and edit as needed. Ex Libris will use these reports to transform the metadata for these materials into data more appropriate for managing electronic resources as part of the Alma migration. Ex Libris calls this process "P2E" for Print to Electronic transformation. Libraries completed their P2E forms by July 9, 2019.
- CARLI staff created a streamlined, Smartsheet-based survey-style version of Ex Libris' complex migration form. This form reflected some of the decisions that are consortial defaults and provided some recommendations and explanations on other questions that were problematic for

the Vanguards. CARLI staff also developed a script to move the library responses from the Smartsheet into the standard Ex Libris Alma migration forms. This was intended to eliminate some of the problems the Vanguards ran into with Ex Libris' migration forms which are Excel sheets with macros that are easy to accidentally corrupt. Most I-Share libraries completed the migration forms and returned them to CARLI by the July 23 deadline. CARLI conducted follow-ups with libraries that needed further assistance and all migration forms, library and location forms, and e-resource worksheets were submitted to Ex Libris by their August deadlines.

- CARLI staff have exported copies of all Voyager data for all 91 I-Share libraries and all SFX instances and have provided that data to Ex Libris.
- At this writing, library staff are actively working on completing their "Configuration Forms" which will provide the initial framework for many of the policy settings in Alma. Configuration forms are due back to CARLI on September 18, 2019.

Other project activity includes:
- CARLI and Ex Libris held a "kickoff" webinar for July 11, 2019. This session provided a big picture overview of the coming changes and tasks. The webinar was also recorded.
- CARLI continues to have scheduled open "office hours" calls to discuss and take questions about the Alma and Primo VE and the migration process. These are usually held on Thursday afternoons at 2pm and recordings of the sessions are made available on the CARLI website. CARLI staff also have a weekly planning call with Ex Libris staff each Tuesday.
- CARLI staff are working with Ex Libris staff to schedule several 2-day, in-person Alma training sessions that will be held around the state this fall and winter. Ex Libris is also planning to offer more CARLI-specific training webinars in coming months.
- Many I-Share library staff have completed the online Alma and Primo VE training that leads to what Ex Libris calls "certification". Certified staff are granted access to Alma and Primo configuration modules. CARLI will provide this support for libraries that do not have Alma/Primo certified staff of their own. For more information see: https://knowledge.exlibrisgroup.com/Alma/Training

Looking Ahead
When the test environments are delivered to the I-Share libraries, library staff should thoroughly review their migration reports and their Alma data to verify that all data migrated as expected and that all configuration settings are as expected. CARLI has provided recommendations as to how to conduct this data review work.

The test environments are also to be used by libraries to test integrations with other products including authentication/single sign on, printers, data "feeds" such as patron updates, etc. CARLI encourages I-Share library staff to get an early start on this work as these are not CARLI products and library staff may need to work with campus IT or vendors to plan and carry out this work.

While Ex Libris and CARLI will be offering a variety of training opportunities, it is not possible for us to reach all the staff and student workers in Illinois that will need to learn Alma. Libraries should be planning how they will provide training within their institution. As we have mentioned in many places, Ex Libris' online Alma and Primo VE training is available to anyone and is free and online with no login required in the Ex Libris Knowledge Center at https://knowledge.exlibrisgroup.com/

The project is on schedule and we still anticipate meeting our scheduled "go live" date of June 24, 2020.

Thank You!
CARLI staff greatly appreciate the time and effort I-Share library staff are putting into making this migration a success and we also appreciate the many excellent questions and ideas the member libraries have shared. Please don't hesitate to contact us at any time with any question or concern.

Please continue to refer to CARLI's Alma/Primo VE webpage for updates, events, and CARLI-specific recommendations: https://www.carli.illinois.edu/products-services/i-share/alma and continue to send your questions to us at support@carli.illinois.edu.

Thank you!

Report prepared September 12, 2019
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