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Go Live Readiness Checklist

The purpose of this checklist is to help library staff verify that essential day-to-day functionality is set up properly, and that library staff are able to perform this work successfully in preparation for going live on Alma and Primo VE.

CARLI has somewhat modified Ex Libris’ standard checklist, but this is predominantly an Ex Libris document and task. Not all tasks will apply to every institution. An asterisk (\*) Indicates that the check may involve an external integration with Alma and another product or service.

Ex Libris would like to have these forms returned by mid-July 2020 so that we can follow up on issues before fall terms begin. Please enter your 3-letter code in the header. Return your form to CARLI at [support@carli.illinois.edu](mailto:support@carli.illinois.edu)

|  |  |
| --- | --- |
| Customer name: | CARLI |
| Institution name: |  |
| Reviewer name: |  |
| Date of last review: |  |
| Planned Alma Go Live date: | June 24, 2020 |

|  | **Acquisitions** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| AC1 | **\*** Are you able to place an order (manually and/or via EOD)? |  |  |  |  | Broadly: <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing>  Ordering Specifically: <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines> |  |
| AC2 | Are you able to execute "Order now"? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines/020Real-Time_Acquisitions> |  |
| AC3 | Are you able to receive physical material? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/090Receiving_Material> |  |
| AC4 | Are you able to activate e–resources from Community Zone (portfolios and e-collections)? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Activating_Electronic_Resources> |  |
| AC5 | Are you able to create local e–resources (portfolios and e-collections)? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_a_Local_Electronic_Collection> |  |
| AC6 | Are you able to manage the process of e-acquisitions (licensing and test access)? |  |  |  |  | Licensing: <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Associating_a_License_to_a_Portfolio>  Test Access: <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Activating_Electronic_Resources> |  |
| AC7 | **\*** Are you able to create an invoice (manually and/or batch)?  \* Do you have the correct approval and review rules in place? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/030Invoicing/010Invoicing_Workflow> |  |
| AC8 | **\*** Are you able to export an invoice for payment?  \* Do you have the correct approval and review rules in place? |  |  |  |  | <https://developers.exlibrisgroup.com/alma/integrations/finance/invoice-export/> |  |
| AC9 | Are you able to manage the process of rolling over a fiscal year? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/100Advanced_Tools/020Fiscal_Period_Closure> |  |

|  | **Resource Management and Inventory** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| R1 | \* Are you able to import new records (individually and batch)? e.g., via Connexion, files from vendors. |  |  |  |  | “Importing Bibliographic Records from WorldCat to Alma” discusses importing new records using OCLC Connexion’s Gateway Export and using Search Resources in the Alma MD Editor: <https://www.carli.illinois.edu/sites/files/i-share/documentation/Importing_Bibliographic_Records_from_WorldCat_to_Alma.pdf>.    Record Import with links to import profile documents:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/060Record_Import> |  |
| R2 | Are you able to overlay/merge brief bib records with full bibliographic records? |  |  |  |  | “Importing Bibliographic Records from WorldCat to Alma” discusses overlay and merge options using OCLC Connexion’s Gateway Export and using Search Resources in the Alma MD Editor: <https://www.carli.illinois.edu/sites/files/i-share/documentation/Importing_Bibliographic_Records_from_WorldCat_to_Alma.pdf>.  Working with Merge Rules:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/080Working_with_Merge_Rules> |  |
| R3 | **\*** Are you able to perform copy cataloging from all required external search resources? |  |  |  |  | External Search resources:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/090Searching_External_Resources#Working_with_Search_Resources_in_the_MD_Editor> |  |
| R4 | \* Are you able to publish your records to external sources? e.g., Google Scholar, OCLC, Hathi Trust, union catalogs |  |  |  |  | CARLI is working with OCLC to modify existing Data Sync Collections so libraries can publish holdings to WorldCat after Go Live.    Publishing profiles for other exports:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/075Publishing_Profiles> |  |
| R5 | \* Are you able to batch update bibs and items using Update jobs and Normalization processes? |  |  |  |  | Running Manual Jobs:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets>    Normalization resources:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/070Working_with_Normalization_Rules#Normalization_Rule_Syntax>    <https://developers.exlibrisgroup.com/blog/alma-normalization-rule-examples/>    <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/030Configuring_Cataloging#Working_with_Normalization_Processes> | CARLI can continue to provide this service as needed. |
| R6 | \* Are you able to print spine labels? |  |  |  |  | Spine-O-Matic resources:  January 30, 2020 Office Hours on Spine-O-Matic: <https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours>    <https://developers.exlibrisgroup.com/blog/spineomatic-label-printing-software-for-alma/>    <https://github.com/ExLibrisGroup/SpineOMatic>    Other options:  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/120Configuring_the_Label_Printing_Tool> |  |
| R7 | Have you started contacting your e-resource vendors to start using the Alma Link Resolver? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/alma-primo-faq#almafaq_linkresurl> |  |

|  | **Fulfillment** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity - Requests** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| F1 | Are you able to print to your library’s printers (either by quick printing, the printing queue, or sending the letters directly to the printer) notifications (e.g. receipts, transit slips)? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice191205>  <https://knowledge.exlibrisgroup.com/@api/deki/files/73678/Letters_-_The_Printout_Queue_and_Quick_Printing_in_Alma.pptx?revision=4>  <https://knowledge.exlibrisgroup.com/@api/deki/files/77785/Letters_-_Printing_features_coming_soon.pptx?revision=3>  For example, the AFN basic workflow demonstrates when to expect Alma to generate some printed letters:  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN>  And demonstrated during : <https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice20200123> |  |
| F2 | Are patron-facing notices sent (e.g., courtesy notices, lost loan notices, borrowing activity letters)? |  |  |  |  | During the Alma test phase, these are not automatically enabled to be sent to patrons. Library staff can test by forcing letters via jobs.  <https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Notices>  CARLI’s Alma: Letters, overview and basic configuration: <https://www.carli.illinois.edu/products-services/i-share/alma/config/letters> |  |
| F3 | Can a patron physical resource request be fulfilled (retrieved from shelf, scanned-in to hold-shelf, checked-out to patron)? |  |  |  |  | AFN basic workflow:  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN>  Demonstrated during AFN office hours: <https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice20200123> |  |

|  | **Fulfillment** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity – Loans** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| F4 | Can items be loaned and returned:  at the circulation desk?  And, if applicable, at self-check machines? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/01_Working_at_the_Circulation_Desk>  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment> |  |
| F5 | Are non-circulatable items blocked from being loaned? |  |  |  |  | Fulfillment Configuration Utility  <https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice191107> |  |

|  | **Fulfillment** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity – Fines/Fees** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| F6 | If you allow patrons to pay fines/fees at the circulation desk, can you successfully process these payments(print/send receipts, patron account updated)? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/01_Working_at_the_Circulation_Desk>  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment> |  |
| F7 | **\*** Are you able to export user fines, fees, and blocks to your bursar office? |  |  |  |  |  | Optional |

|  | **Fulfillment** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity – Resource Sharing** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| F8 | Are you able to create and updateresource sharing borrowing requests? |  |  |  |  | AFN basic workflow:  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN> |  |

|  | **Fulfillment** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity – Course Reserves** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| F9 | Can you create and update courses and reading lists? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_reserves> |  |
| F10 | Are you able to discover published course information in your discovery system? |  |  |  |  | Course Reserves scope in Primo VE  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/Configuring_Course_Reserves_for_Primo_VE> |  |

|  | **Fulfillment** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity – General** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| F11 | Are you able to register a new patron? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/010Managing_Users>  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment> |  |
| F12 | When patrons ask about fines/fees assessed to them, or loaned items claimed to have been returned, are you able to find relevant information (e.g., dates, barcodes, amounts, audit trail)? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/01_Working_at_the_Circulation_Desk>  <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment> |  |
| F13 | Can you successfully update the libraries calendar? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification/Fulfillment/Fulfillment_02%3A_Calendars>  <https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Calendars>  Adding Exception Dates: <https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Calendar_Management_-_steps_to_reduce_(or_add)_hours_over_the_library_Standard_Opening_Hours> |  |

|  | **User Management** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| U1 | Are you able to manage staff users?  You should be able to answer yes to the following questions:   1. Are all library staff able to login and perform their basic daily tasks? 2. Can we create new user records for library staff to use Alma? 3. Can we assign Alma staff roles to library staff users? 4. Can we create new user records for patrons? |  |  |  |  | The tasks involved in adding users manually are posted at <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/010Managing_Users>  Details on available staff roles and how to assign them is posted at <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/060Managing_User_Roles> |  |
| U2 | **\*** Are you able to sync user records in Alma with your institution’s Student Information System (SIS)? |  |  |  |  | CARLI has provided sample export details for several common Student Information Systems.  <https://www.carli.illinois.edu/sis-student-information-systems-specific-patron-extract-resources> |  |
| U3 | \*Are you able to login to Alma and Primo VE using your single sign-on authentication service? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/User_Management/Authentication>  <https://www.carli.illinois.edu/products-services/open-athens> |  |

|  | **Primo VE** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Primo Look & Feel** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| P1 | Are Basic and Advanced search boxes configured correctly (search profiles etc.)? |  |  |  |  | CARLI documentation:  <https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs>  <https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustadvanced>  Search Profiles:  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Search_Profile_Slots>    <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/010Configuring_Search_Profiles_for_Primo_VE>  Course Reserves:  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/Configuring_Course_Reserves_for_Primo_VE>  Advanced Search:  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Advanced_Searches> |  |
| P2 | Are search results in Primo VE being displayed correctly? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustbriefresults>  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Brief_Results_Page> |  |
| P3 | Do the links in the Main Menu appear correctly and link to the desired web pages? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustlinksmenu> <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Links_Menu> |  |
| P4 | Does the full record view contain all relevant information (Details, Links etc.)? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustfullrecord>  Details: <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Details_Service>  <https://www.carli.illinois.edu/sites/files/i-share/documentation/Primo_VE_default_display_fields.pdf>  Links: <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/034Get_It_Configuration/001Primo_VE_Delivery_Services>  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/060Alma-Primo_Integration/060Configuring_Alma_Delivery_System/120Adding_a_General_Electronic_Service> |  |

|  | **Primo VE** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Primo Search & Brief Results** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** | |
| P5 | Is the browse search configured correctly (if applicable)? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Browse_Search>  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/055Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Browse_Search_for_Primo_VE> |  | |
| P6 | Are all facets configured correctly? |  |  |  |  | CARLI documentation:  <https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustbriefresults>  Configuring Facets on the Brief Results Page:  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Brief_Results_Page> |  | |
| P7 | Does My favorites functionality work correctly? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/End_User_Help/Using_My_Favorites_in_Primo_VE> |  | |

|  | **Primo VE** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Patron’s Activity** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** | |
| P8 | Can patrons request materials in Primo VE? |  |  |  |  | <https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN#PrimoVERequesting> |  | |
| P9 | Can patrons renew renewable loans in Primo VE? (Is the renew option available and did the item renew according to your institution’s policies?) |  |  |  |  |  |  | |
| P10 | Can patrons view their fulfillment activities in Primo VE "My Account"? |  |  |  |  | My Library Card: <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/End_User_Help/13Using_My_Library_Card_in_Primo_VE>  Configuration of My Library Card:  <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Library_Card_Configuration> |  | |
| P11 | Can patrons view links to e-resources? |  |  |  |  | E-resources appear in the View It section: <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/034Get_It_Configuration/001Primo_VE_Delivery_Services#View_It> |  | |
| P12 | Can patrons view full text? |  |  |  |  | If full text is not working as expected, check authentication configurations and activation status of the resource. |  | |

|  | **Analytics** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Library Activity** | **Yes** | **No** | **NA** | **Not Yet Tested** | **Resources** | **Notes** |
| AN1 | Are you able to access Alma Analytics? |  |  |  |  | Users must have the Design Analytics role. Users should gain familiarity with the terminology and user interface.  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction>  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/020Navigating__Analytics> |  |
| AN2 | Are you able to run out-of-the-box reports? |  |  |  |  | Out-of-the-box reports are identified at <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/060Out-of-the-Box-Reports>  Analytics users should also learn how to copy an out-of-the-box report to their institution’s shared reports folder.  <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/030Community_Folder_Structure> |  |
| AN3 | Are you able to create a new report? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/050Creating_a_New_Report> |  |
| AN4 | Are you able to schedule a report? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/040Scheduling> |  |
| AN5 | Are you able to **s**ubscribe to a report? |  |  |  |  | <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/040Scheduling> |  |