CARLI Alma Primo VE Migration Project
Status Report to the CARLI Board of Directors, March 6, 2020

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 was also setup as part of the Vanguard phase. The five Vanguard library and Vanguard Network Zone test environments were replaced with the delivery of the full 91 test environments in October.

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.

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 delivered the test environments on October 23. 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 Ex Libris begins to prepare them for the production loads in April or May 2020. Some components of the test environments will persist into production including libraries and locations, configuration settings, vendor records, integration profiles, and e-resource activations. Data (bibs, holdings, items, item status, patrons, etc.) will be wiped and reloaded during the production load. During the approximately 6-7 months that the test environments are in place, I-Share libraries should use these environments 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).

For a summary of the accomplishments from June-August, 2019, see the CARLI Alma/Primo VE Project Status Report to CARLI Board of Directors, September 13, 2019

For a summary of the accomplishments from September-November, 2019 see the CARLI Alma/Primo VE Project Status Report to the CARLI Board of Directors, December 6, 2019

The following points summarize some of the work that has been completed since the last report to the Board in December:

- Three, two-day, in-person Alma training sessions have been presented by Ex Libris staff at UI Springfield, Joliet Junior College, and Wheaton College. Fifty institutions have sent staff to these sessions, 14 more institutions are sending staff to a session at UIC in December. Six more two-

day sessions are scheduled for January and February at NIU, Monmouth, Lewis and Clark, Parkland and two more sites in process.

- 144 people from 60 I-Share libraries have completed Alma certification training (i.e., the training Ex Libris requires an institution to complete before they can adjust their Alma configuration settings.)
- Library staff completed their Alma "Configuration Forms" by the September 18, 2019 deadline. These forms were used by Ex Libris to populate the policies and configurations in the Alma test environments. These settings, and any changes Alma-certified library staff may make to them in the test environment, will persist into the production environment.
- Ex Libris delivered the 91 test environments on October 23. Access was read-only access to test until November 6 to allow for testing time without complications from data or setting changes. The test environments include all data from each institution's Voyager database plus any e-resource data the library chose to migrate. I-Share library staff are continuing to review their data and configuration settings and should note any changes to make before or during the production migration in spring.
- Ex Libris completed indexing the Primo VE discovery services and delivered access to them to CARLI staff the week of November 25. CARLI staff have conducted some testing and will be rolling out access to Primo VE during the week of December 2.
- CARLI staff delivered information to libraries on updating library staff login accounts so that individual staff at each institution may begin working with their own credentials and roles.
- CARLI staff are convening an informal advisory group of 12 I-Share library staff volunteers to help develop initial recommendations for cataloging in the Alma institution zone (IZ) and network zone (NZ) environments. This group will help CARLI staff to identify and transition to workflows in Alma that best meet existing CARLI policy and practice for cooperative cataloging. Members of the group will test Alma's cataloging functionality related to local data retention, cataloging permission levels, record import practices including record match points, and NZ linking and unlinking. CARLI expects that these tests will help identify workflows for institutions to begin cataloging their resources in both their IZ and the NZ, and to identify conditions when records should be merged, replaced, or kept as is.
- CARLI staff are working with institutions that have volunteered to help pilot the process of synchronizing Alma/Primo VE user information with campus student information systems. This process is referred to as "SIS" (student information systems) by Ex Libris. Currently, we have identified institutions willing to pilot synchronization with the following systems:
  - o Banner - UIU, LEW, SIC
  - o Colleague Unidata - LAC
  - o Jenzabar CX- KNX, RCC, COL
  - o PeopleSoft - SIM, ICC
  - o Populi – MLS

  We are still looking for sites that can serve as pilots for these products
  - o Colleague SQL
  - o Jenzabar EX
  - o Blackbaud
  - o GradPro

  SIS pilot projects should be completed by February, and should provide templates for other institutions that use those systems to follow, so that all institutions that wish to do so. can test the SIS process by February and March. Libraries that wish to start to set up a SIS integration do not need to wait for the pilots to complete if they wish to start sooner.
- The CARLI Resource Sharing Committee has investigated options for reducing the amount of personally identifiable information (PII) being migrated to Alma. Their efforts have focused on options for deleting long-expired patron records and long-unpaid fines and fees. The Committee plans to present a recommendation to the CARLI Board of Directors.

Other related activity includes:
- CARLI continues to have scheduled open "office hours" calls to discuss Alma and Primo VE topics and take questions about the products 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 is in the process of completing a contract with EBSCO for Open Athens, an access management system that facilitates single sign-on access to content and services like Alma and

Primo VE. CARLI is purchasing Open Athens for all CARLI governing members for three years on consortial funds. More details will be shared broadly once the contract is complete.

Looking Ahead
I-Share library staff should be thoroughly reviewing 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 and CARLI staff can help provide recommendations on how and when to make changes libraries may wish to make.

Library staff should also be testing Alma integrations with other products including, printers, self-check stations, and other equipment and services that they use in combination with Voyager. 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.

Libraries should be planning how they will provide Alma and Primo VE training within their institution. As we have shared before, Ex Libris' online Alma and Primo VE training is available to anyone and is free online with no login required in the Ex Libris Knowledge Center at https://knowledge.exlibrisgroup.com/

And last but not least, the project remains 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 March 4, 2020
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