



CARLI Alma Primo VE Migration Project

Status Report to the CARLI Board of Directors, June 12, 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

Cutover/go live on Alma Primo VE June 24, 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](#)

For a summary of the accomplishments from December 2019-March 2020 see the [CARLI Alma/Primo VE Project Status Report to the CARLI Board of Directors, March 6, 2020](#)

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

- One more two-day Alma training session was held: at the Big Ten Conference Center in March. Two more sessions were planned for March and May but were cancelled due to COVID closures. Overall, 347 people from 88 of the 91* I-Share institutions attended in-person Alma trainings. Only SEI, SFM, and SWI did not send staff to any in-person training.
- All but 6 I-Share libraries have staff that have completed Alma certification training (i.e., the training Ex Libris requires an institution to complete before they can adjust their Alma configuration settings.) The 6 are ADL, IMS, SFM, SML, SSC, and TRT. CARLI staff will continue to perform configuration changes for these sites in Alma and Primo VE.
- Libraries made any required changes to their Alma migration forms by the April 1 deadline, and suspended work on their Alma test environment configuration settings before that access was suspended on May 1.
- The Voyager "Tech Freeze" began May 1, after which date library staff were no longer able to add/change/delete cataloging, acquisitions, or serials data in Voyager.
- We had planned to keep Universal Borrowing operating until June 11, but it was turned off on March 16 due to the COVID closures including the suspension of ILDS service.
- Circulation activity can continue in Voyager until June 19 (i.e., through June 18) but most I-Share libraries remain closed due to COVID. A few I-Share libraries have supported some local requesting (remote request by their own patrons) during the closures.
- CARLI staff created a new set of union catalog data to provide to Ex Libris for the Alma Network Zone migration. The new data eliminate any suppressed bibs and bibs without holdings and eliminated many bibs of lower quality.
- CARLI staff copied all Voyager data (bibs, holdings, patrons, circ status) for all I-Share institutions and provided it to Ex Libris for loading into Alma. All but 25 I-Share institutions are also migrating some acquisitions and/or serials data to Alma. Ex Libris expects to complete loading these data into Alma during the week of June 15.
- CARLI exported and provided SFX data from 39 institutions to Ex Libris for the migration and 40 institutions provided data from EBSCO, 360, or OCLC link resolvers for the migration.
- CARLI staff have been continuing to work with institutions that want to use the process of synchronizing user information between campus student information systems and Alma. This process is referred to as "SIS" (student information systems).
- CARLI staff have been working with library staff, the EBSCO OpenAthens project team and Ex Libris staff on getting authentication setup for the I-Share libraries. At this writing, 64 I-Share institutions have partially or completely setup OpenAthens, including 6 that will upload user data to OpenAthens as they did not have an institutional identity service to work with. Also, 24 institutions have set up authentication Alma integrations directly with their campus systems which include LDAP, CAS, Shibboleth, ADFS, and Azure. One site, ALP, is not implementing authentication as they do not allow any access to their e-resources outside of their physical building. These authentication implementations will allow users from these sites to be able to sign in to Alma and Primo VE using their standard institutional credentials, i.e., via "single signon". This work has been complicated by institutions not typically having stored their campus signon credentials in Voyager, requiring many sites to need to either add data elements into Voyager patron records, or plan to do a user update to bring these data elements into Alma via the SIS process at the time we go live on Alma.

Other related activity includes:

- In response to the COVID closures, CARLI staff have prepared a proposal to the Board to extend all due dates that fell between January 1, 2020 and September 30, 2020 to October 1, 2020 to prevent patrons from being fined overdue fines for items that could not be returned during closures. CARLI staff will be able to do these bulk due date changes in Alma immediately after we go live. The new due date can be further extended for all or selected sites as need be when sites know more about reopening plans.
- CARLI has continued to hold weekly open "office hours" calls to discuss Alma and Primo VE topics and take questions about the products and the migration process. These are held on Thursday afternoons at 2pm and recordings of the sessions are made available on the CARLI website. These calls have been very well attended, often attracting over 160 participants.

* The merger of Robert Morris University (RMC) into Roosevelt University (ROU), and the closure of MacMurray College (MMC), has changed the number of I-Share institutions from 91 to 89 in spring 2020.

- CARLI staff continue to have weekly planning calls with Ex Libris staff each Tuesday and we anticipate this continuing through the summer after go-live.

Looking Ahead

- Ex Libris is on schedule to deliver our real production Alma environments for our review beginning on June 17. I-Share libraries will need to review and formally accept their Alma data migrations before they can go live on Alma. These reviews will occur in two rounds: bib data must be reviewed and accepted by noon on Friday June 19, and fulfillment data must be reviewed and accepted by 5pm on Tuesday, June 23. I-Share libraries' Alma Primo VE contacts and directors were sent an email about this process on June 9. Any I-Share library that will not have staff available to do this review work, should inform CARLI of this by June 12. If an institution does not provide a formal acceptance (or report a major problem preventing acceptance) to CARLI by the deadlines above, the data will be declared accepted to Ex Libris.
- Library staff must not do any "real work" in Alma until we formally go live on the morning of Wednesday, June 24.
- With the COVID closures and ILDS suspension of delivery service, we do not currently know when we will be able to turn on the Alma Automated Fulfillment Network (AFN, the Alma resource sharing equivalent of Voyager's Universal Borrowing). Please watch your email for more news about our AFN launch when we are able to schedule it.
- And last but not least, the project remains on schedule and we still anticipate meeting our scheduled "go live" date for the morning of Wednesday, June 24, 2020.

Thank You!

CARLI staff greatly appreciate the time and effort I-Share library staff have put into this large project, particularly during these unprecedented facility closures and while working remotely. Please don't hesitate to contact us at any time with any question or concern. As a reminder, we always prefer that you send email questions to us at our support@carli.illinois.edu email rather than sending them directly to individual CARLI staff as that gives us the best options for coverage when our staff may be away or exceptionally busy.

Please continue to watch your email and 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 June 10, 2020
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