



CARLI Alma Primo VE Migration Project ***Status Report to the CARLI Board of Directors, June 14, 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 Full Test load environments are delivered in approximately mid-October 2019.

The following Vanguard Phase tasks have been completed since the March 2019 status report to the CARLI Board:

- Vanguard sites completed Ex Libris' worksheets (some quite complex) outlining their migration choices for locations, loan polices (called "Terms of Use" in Alma), acquisitions data, link resolver data, and bibliographic data for electronic and physical collections.
- CARLI staff extracted all Voyager (and where applicable, SFX) data for the Vanguards and provided it to Ex Libris for processing.
- Vanguard Alma test environments were delivered to the five libraries during the week of May 20, 2019.
- Primo VE test environments were delivered to the five libraries during the week of May 27, 2019.
- Ex Libris presented a three-day workshop on Alma workflows for the Vanguards and CARLI staff in Champaign, June 4-6, 2019. Each Vanguard sent participants, with approximately 40 staff attending each day over the course of the workshop.
- Ex Libris and CARLI staff met in person in Champaign on June 7 to strategize on next steps and ideas for scaling the project up from 5 to 91 institutions.
- Vanguard libraries will have access to their test environments through approximately mid-October 2019, when the Full Test environments are delivered to all 91 institutions.
- Vanguards will continue to test system integrations (e.g., exporting data to campus financial systems, patron data updates, etc.) and will be working with CARLI staff to test resource sharing through the summer and fall.

Phase 3: Full Test and Implementation Phase ("kickoff" webinar July 11, 2019 – "Go Live June 24, 2020)

The Full Test and Implementation Phase will include a full test migration of all 91 I-Share libraries' Voyager and e-resource management data, the creation of a new I-Share Network Zone and a thorough

test of the results of the test loads and configurations. The Full Test environments will remain in place for the 91 institutions until the final Production (aka “Cutover”) 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 and testing their workflows and integrations. CARLI and Ex Libris will also continue to have weekly calls with the I-Share library staff and are beginning to plan for some in-person and webinar-based planning and training sessions. If they have not already done so, I-Share library staff should now start working through the online training videos and documents that are available in the Ex Libris Knowledge Center and staff that wish to do Alma and/or Primo VE configuration work, will want to start working towards completing the Ex Libris Administration Certification training. For more information see: <https://knowledge.exlibrisgroup.com/Alma/Training>

Although it has not “officially” yet begun, the following work has been started on the Full Test Load:

- Libraries have completed a worksheet indicating which of their Voyager locations have been used for e-resources. The worksheet was due June 4, 2019.
- CARLI staff are developing a somewhat streamlined version of Ex Libris’ migration form used with the Vanguard libraries. This form will reflect some of the decisions that are consortial defaults and provide some recommendations and explanations on other questions that were problematic for the Vanguards.
- CARLI and Ex Libris have scheduled a “kickoff” webinar for July 11, 2019 at 2pm CT. Please watch your email for more information about this webinar. This session will be appropriate for a general audience, as it will provide a big picture overview of the coming changes and tasks. The webinar will also be recorded for viewing at a later date.
- CARLI has started having scheduled open “office hours” calls to discuss and take questions about the migration process.
- CARLI and Ex Libris will start having weekly webinar/calls with all I-Share libraries on specific topics related to the migration. These will be held on Thursday afternoons at 2pm CT beginning July 18. Please watch your email for meeting topics and how to connect to these sessions.

To meet our June 24, 2020 “Go Live” date, CARLI and Ex Libris will need to begin the process of taking the final snapshots of Voyager and SFX data in mid-May 2020. Currently, we do not have enough experience with this “extract” process to predict exactly how long it will take for 91 institutions, so we are being very cautious with these dates. Once we start making these final copies of the Voyager data to be migrated, we will ask libraries to stop updating (i.e., adding, changing, or deleting) bibliographic and acquisitions data in Voyager. If libraries must update these data in Voyager following this “freeze” they will have to re-do that work in Alma, so this should be done only when absolutely necessary. Circulation work can continue in Voyager up until just a couple days before we go live on Alma. Please note that we will be able to provide more exact deadlines and dates for these events and tasks after the Test Load is completed in October, 2019.

Other Items

It should go without saying, that this migration is inherently complex due to its scope, interactions, and outcomes. Library staff will need to allow sufficient time for this work, libraries will need to involve staff that are familiar with the institutions’ policies and practices, and everyone should start their work well before the deadlines to allow time to ask questions and receive assistance from CARLI and Ex Libris. If your library simply cannot accomplish a task or meet a deadline for whatever reason, please let CARLI know as soon as possible and *before the task deadline* so that we can work with you to keep your library moving forward towards Alma.

Also, as we have mentioned in many communications, Alma and Primo VE training provided by Ex Libris is available to anyone and is free and online with no login required in the Ex Libris Knowledge Center at <https://knowledge.exlibrisgroup.com/> Please start taking advantage of these resources as soon as possible, and 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 June 12, 2019
Kristine Hammerstrand, CARLI Director of User Services*