Welcome!

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources

CARLI

OPEN OFFICE HOURS
THE HOME STRETCH TO "GO LIVE"
JUNE 11, 2020

- Project Reminders

- Data Review Reminders

- SIS Load Reminders

- "Go Live" – What does it mean and when does it happen?

May 22 – Alma & Primo VE should no longer be used

June 15 – Last day to file Voyager Patron Purge WROs

June 17 – Last day to file Voyager Patron Load WROs

June 18 at 11:59 PM – Stop using Voyager Circ

June 19 at 12:01 AM – Cutover Fulfillment Extracts from begin

June 19-24 – Libraries may use Alma Offline Circ

https://www.carli.illinois.edu/products-services/i-share/alma/install-alma-offline-circ-util

June 17-19 – Bibliographic Data Review in Alma

June 22-23 – Fulfillment Data Review in Alma

June 24 – Live on Alma and Primo VE

October 30 – Voyager, VuFind, WebVoyage, SFX shut down

https://www.carli.illinois.edu/products-services/i-share/alma/voyager-sfx-end

- Updated Webpage on Data Review
  - https://www.carli.illinois.edu/products-services/i-share/alma/production-datareview

- CARLI will let you know when Alma is available for Data Review.
  - June 17-19 for Bibliographic Data. Your Alma Primo contact sends an email to CARLI support indicating acceptance of your Bib data load by **Noon on Friday, June 19th**.
  - June 22-23 for Fulfillment Data. Your Alma Primo contact sends an email to CARLI support indicating acceptance of your Fulfillment data load by **5:00pm on Tuesday, June 23rd**.

- With either review: **If there are any concerns, inform CARLI immediately** via email as outlined on Data Review webpage.

Logging in depends on the authentication configured for your IZ:

- Institutions with INTERNAL-only users log in with an Alma password

- Institutions with authentication configured, tested, and not needing a "Day 1" SIS load, library staff users should be EXTERNAL and log in with campus credentials

- Institutions that have been informed that they need a "Day 1" SIS load, library staff users are INTERNAL users during data review and log in with an Alma password

More details on how to log in as an INTERNAL user will be provided on the Data Review Webpage before June 17.

- Alma Configuration will be reopened on June 23 after an institution has accepted their Fulfillment data load.

- **Note: no circulation, no acquisitions, and no cataloging activities of any kind should be performed in Alma until "go live" on June 24.**

- Configuration activities can resume, for example:

    - Updating calendars
    - Primo VE customization
    - Third-party integration testing
    - [Set up import profile to load records cataloged in Connexion during Tech Freeze](#)
    - SIS loading

- Many I-Share libraries did not have a unique identifier attribute in Voyager patron records that they are using to authenticate for single-signon with campus credentials, e.g., a Net ID or other campus ID

- These sites may have successfully tested single signon with Alma and Primo VE if they did a full SIS test that added the data element in Alma that is also in their campus system; and/or if they used a test ID they created that included that data element

- The fulfillment load will bring a new copy of your patron data in from Voyager, so your Alma users will revert to user records that again do not include your authentication attribute

- If CARLI tells you this applies to you, please be prepared to do a SIS data synchronization as soon as you have accepted your fulfillment data.

- CARLI can assist with these loads if you are not able or comfortable doing SIS work yet.

- This applies to about 40 institutions, We are contacting each of you.

- All I-Share Institutions will "Go Live" on Alma the same date: June 24.
  - Remember that when you accept your Fulfillment load, you are still <u>not</u> live. **No circulation, no acquisitions, and no cataloging activities of any kind should be performed** until CARLI informs libraries that we have received the "go live" signal from Ex Libris.
- All I-Share Institutions will "Go Live" with Primo VE on the same date: June 24.
  - Primo VE should not be used as a resource for Data Review as indexing will be ongoing until Go Live.
  - Change URLs on your websites and resources
  - Begin to use Permalinks to individual records in Primo VE

- Will AFN (consortial) requesting be live at "Go Live" on June 24?
    - No. ILDS will not resume regular delivery service until June 29 in RAILS and not until July 6 in IHLS; and then only to libraries that have indicated they are ready for delivery.
    - We will not start AFN until *at least* the week of July 6.
    - AFN can be enabled on an institution-by-institution basis once we have a reasonable number of I-Share libraries open
- Will Local Requesting be live at "Go Live" on June 24? (i.e., our patrons requesting our items)?
    - Local requesting can be enabled soon after go-live on an institution-by-institution basis.
    - With ILDS not fully available until at least July 6, local requests will only be able to be picked up at your institution.
    - Let CARLI know by sending email to support@carli.illinois.edu

- Alma Offline Circ (June 19-24)
  - Remember it is for only LOCAL patrons and LOCAL items
  - Please don't use for Returns (Discharge) during Migration
  - Documentation: https://www.carli.illinois.edu/products-services/i-share/alma/install-alma-offline-circ-util
- Bulk Renewal on items due during COVID-19 closures
  - We don't want to fine people for items they simply could not return with libraries and ILDS closed
  - CARLI is proposing to do a bulk renewals in Alma (not an option in Voyager); CARLI staff would do this work
  - Proposal will be action item at CARLI Board meeting tomorrow (June 12)
  - More information coming soon

- All I-Share Libraries will "Go Live" on the same date: June 24.
  - We're Live – now what?

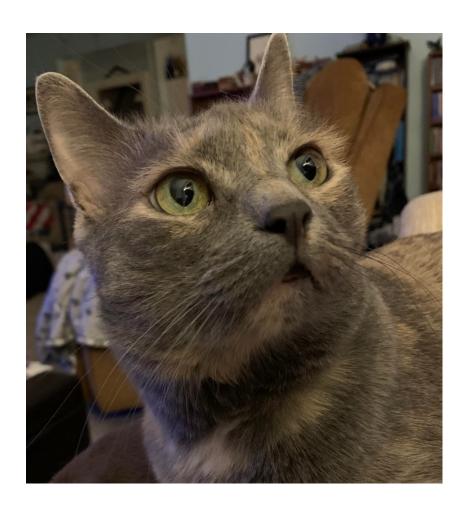CARLI is preparing a webpage of reminders and potential tasks:

- Some Day One Examples:
  - Test Logging in: to Alma; to Primo VE
  - Test Circulating a book

- Some Week One Examples:
  - Update the URLs that point to VuFind so they are pointing at Primo VE
  - Set up and Test your OCLC Gateway Export:

https://www.carli.illinois.edu/sites/files/i-share/documentation/Importing_Bibliographic_Records_from_WorldCat_to_Alma.pdf

  - Test OCLC Backloading Scenarios

https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours

Questions?

Thank you!

Join us next Thursday
at 2pm for another
Office Hour

You can always contact CARLI at support@carli.Illinois.edu

**CARLI
I-Share**