CARLI Alma Primo VE Migration Project
Status Report to the CARLI Board of Directors, March 8, 2019

CARLI's Ex Libris Alma Primo VE migration project has three major phases as defined by Ex Libris:

Phase 1:	Onboarding	January 2019 - February 2019
Phase 2:	Vanguard	March 2019 - ~June 2019
Phase 3:	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. The Onboarding Phase is now complete. The following tasks were completed as part of the Onboarding Phase of CARLI's Alma Primo VE project:

- CARLI surveyed the I-Share library directors to identify an institutional Alma Primo VE project leader for each I-Share member; we then established a new CARLI email list called "AlmaPrimoContacts" and all of these contact people were added to the new list.
- CARLI identified which I-Share libraries have Voyager acquisitions data to possibly migrate to Alma.
  - We have identified all I-Share libraries that have ever used Voyager acquisitions and or serials control. Some of these libraries have minimal data that they may or may not choose to migrate during the Implementation Phase. We have opted to include these institutions as there is no additional cost to add these migrations now, nor cost for removing them later; but adding additional migrations to the project during the Implementation Phase could incur additional migration fees.
- CARLI identified which I-Share libraries have Voyager course reserves data to possibly migrate to Alma.
  - We have identified all I-Share libraries that have ever used Voyager Course Reserves. Some of these libraries have minimal data that they may or may not choose to migrate during the Implementation phase. We have opted to include these institutions as there is no additional cost to add these migrations now, nor cost for removing them later; but adding additional migrations to the project during the Implementation phase could incur additional migration fees.
- CARLI surveyed the I-Share libraries to determine which link resolvers and/or electronic resource management (ERM) systems they currently use, and from which they may possibly want to migrate data to Alma.
  - These e-resource system migrations are also included in the cost of the project. CARLI will coordinate the migration of the 38 SFX libraries' data from our SFX system. Libraries using other products will need to work with Ex Libris, who will provide migration tools and forms, and their e-resource system vendors to migrate their data.
- CARLI asked for Vanguard volunteers and selected five I-Share institutions to serve as Vanguard libraries. Over 20 institutions volunteered. The following five were selected to represent a diverse array of library operations, organization, and e-resource systems.
  - Newberry Library (NBY)
  - North Central College (NCC)
  - Southern Illinois University Carbondale (SIC)
  - University of Illinois at Chicago (UIC)
  - University of Illinois at Urbana-Champaign (UIU)
- CARLI office staff began working through the Ex Libris online Alma and Primo training sessions.
- CARLI and Ex Libris provided the Vanguard sites with a list of tasks they can start doing now including assembling their local project team, reviewing Alma migration planning documents, beginning the Alma online training, and reminders about Voyager data cleanup priorities.
- CARLI created an Alma Primo VE web page on the CARLI website including an FAQ for the project. https://www.carli.illinois.edu/products-services/i-share/alma

Phase 2: Vanguard Phase (begun March 5, 2019)

During the Vanguard phase, CARLI, the Vanguard libraries, and Ex Libris do a rapid data migration of the full set of Voyager and e-resource management data for the Vanguard libraries (only) to provide an early test of migration plans and a test environment for working on configuration settings for Alma and Primo VE. An Alma Network Zone for consortial data and resource sharing is also setup as part of the Vanguard phase. The five Vanguard library and Network Zone test databases will remain in place until the Implementation phase begins.

The Vanguard phase of CARLI's Alma Primo VE project began March 5, when the CARLI staff had their first phone meeting with the Ex Libris staff who have been designated as our Project Manager and Project Sponsor (the person to whom the Project Manager reports.)

The following Vanguard Phase tasks are in process;

- CARLI is polling the Vanguard library contacts to set up a time for our weekly calls with Ex Libris.
- Vanguard sites are assembling their local project teams and starting the online Alma and Primo VE training courses.
- Vanguard sites are reviewing the data migration planning documents, particularly as applicable to systems that CARLI does not run and for which CARLI will not manage the data extracts (e.g., ProQuest 360, EBSCO Full Text Finder, Coral, etc.)
- CARLI has modified (and simplified) an Implementation survey that Ex Libris uses to gather information about Voyager and Alma product integrations. We will soon be piloting this survey with the Vanguards.
- CARLI will be providing ongoing updates to the I-Share libraries on the Vanguard phase process as it progresses.

Phase 3: Implementation Phase (to begin about July 2019)

The 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. Following that, all data will be migrated again for the final production system. Upon migration acceptance, CARLI and the I-Share libraries will deploy Alma and Primo VE for their local and I-Share consortial library management and discovery systems. Voyager and SFX data will be "frozen" from any modification and these products will eventually be decommissioned. We still anticipate all 91 I-Share libraries going live on Alma and Primo VE in June 2020.

Other Items

We do not yet have a complete and final project timeline from Ex Libris; that will be shared broadly as soon as we have it.

All Alma and Primo VE training provided by Ex Libris is available to anyone free and online with no login required in the Ex Libris Knowledge Center at https://knowledge.exlibrisgroup.com/ Note: when seeking information about Primo VE in the Knowledge Center or elsewhere, remember that Primo VE is different from the original Primo product in many ways; make sure the materials you review pertain to the Primo VE product.

CARLI is working to identify Voyager data cleanup projects I-Share libraries can and should be working on in preparation for the data migration. Many of these data cleanup tasks were already on our webpage list of data maintenance priorities, but we are creating a new data cleanup page that is more specific to the needs of the Alma Primo VE project at https://www.carli.illinois.edu/products-services/i-share/alma/datacleanup