

I-Share Alma and Primo VE Test Migration Project Launch Webinar

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Please Note:

This Presentation is an overview; It is *not* a substitute for Alma and Primo VE Training !

- Most Alma and Primo VE training is online and self-paced
- Don't wait, you can start learning about Alma and Primo VE now



Who, What, When, Where...

- Who: All 91 I-Share institutions
- What: Moving from Voyager and VuFind to Alma and Primo VE
- When: Testing underway now with 5 Vanguard (pilot site) libraries, testing for all 91 to begin summer/fall 2019, all 91 I-Share libraries move to Alma and Primo VE in June 2020
- Where: Alma is “cloud” hosted by Ex Libris; used by libraries all around the world

...and...

...And Why?

- Voyager is aging, and was designed for managing print resources only
- Alma provides integrated electronic resource management (activation, link resolving, storing licenses, etc.)
- Primo VE provides discovery for the library's catalog of physical and electronic resources, as well as consortial resources and resource sharing
- Alma and Primo VE are web-based, no loading and managing Windows client software
- Many more reasons than can fit on a slide!

A Bit About Alma

- It is referred to as a “unified resource management system”
 - Designed to manage e-resources as well as physical resources
 - Replaces any link resolvers (e.g., SFX) and other e-resource management systems I-Share libraries are using
- It is also referred to as a “library services platform”
 - “Cloud” hosted software and data
- Supports the “local” and consortial functionality we have in Voyager
 - Union catalog view
 - Resource sharing (remote and onsite, like UB)
- Built in support for consortial resources, policies, settings

A Bit About Primo VE

- Ex Libris recently re-designed their Primo discovery service and rebranded it as Primo VE
 - Includes real time status information from Alma
 - Uses the same configuration setup components as Alma
- Primo VE provides discovery of library and consortial physical and e-resources, reserves, links to other ILL services
- We did not set out to buy a public-facing discovery interface; the plan was to continue to support VuFind
- Included in our Alma purchase, will replace VuFind when we go live with Alma in June 2020
- No extra charge to I-Share libraries for Primo VE

Alma and Primo VE “Zones”

- All customers share access to a “**Community Zone**” that has a central knowledge base that contains metadata for e-resources and details about e-resource packages’ content
- CARLI, like many other consortia using Alma, will be implementing a “**Network Zone**” where consortial collections, policies and more will be able to be managed
- All customers have their own library’s inventory (physical holdings), staff users, and local policies in an “**Institution Zone**”

Our Project Phases and Timeline

- Onboarding phase January-February 2019
 - Define the project scope and basics
 - *COMPLETED*
- Vanguard phase March-July 2019
 - 5 institutions will do a rapid test implementation of Alma and Primo VE
 - Vanguards now have access to test environments of their data
- Full test implementation June 2019-March 2020
 - A full test implementation for all 91 libraries
- Production data migration April-June 2020
- Go live (aka “Cutover”) on Alma and Primo VE June 2020

Vanguard Test Data Migration, March-July 2019

- Five institutions have done a rapid data migration and setup
 - NCC, NBY, SIC, UIC, UIU
- Several libraries volunteered, these 5 were selected because of their diversity of collection, size, systems
- They are working with CARLI staff to pilot the full consortial data migration, configurations and workflows
- In addition to Voyager data, the Vanguards are testing migrating their e-resource management data from various systems
- A test Alma Network Zone (union catalog and consortial services) has also been built

Full Test Data Migration for all 91 I-Share Institutions

- Summer 2019, all 91 libraries will complete data migration/mapping worksheets
- Fall 2019, CARLI and Ex Libris will copy data from Voyager and SFX and apply settings from migration worksheets
- Libraries that use e-resource systems other than SFX (e.g., 360, EBSCO Full Text Finder, OCLC License Manager) will test migrating those data into Alma (by exporting for 360 and mapping for EBSCO and OCLC) CARLI will copy and share all Voyager and SFX data with Ex Libris
- Libraries will have a full copy of their data in an Alma/Primo VE test environment to use for testing and staff training by late October 2019
- Libraries will use this test environment to plan their integrations such as importing patron data, testing their printing setup, other add-on's such as self-check systems, etc.

Go Live on Alma and Primo VE

- We will do one more full data migration in late Spring 2020, the “Production Load”
 - Opportunity to fix issues we found in the Full Test Load
 - Deadlines are still TBD for final worksheets and data extracts
- Go Live is tentatively scheduled for June 24, 2020
- Voyager will ultimately be turned off
- VuFind will be turned off, libraries will switch to Primo VE for discovery of their physical and e-resources, and patron resource sharing

Four of the Areas a Library Management System Change Will Impact

- Hardware
- Software
- Data
- People



Hardware (Computers, scanners, printers...)

- What is not changing
 - Keep your desktop computer, scanner
 - Self check machines will work
- What is changing
 - Desktop computers do not need to be Windows PCs
 - Options to use tablets (e.g., iPads) for mobile staff work, e.g., paging requests, inventory work
 - Printing will be an email-based process
 - Read about this in the Ex Libris Knowledge Center and start planning



Software

- What is not changing
 - The vendor: Alma and Primo VE are ProQuest Ex Libris products like Voyager and SFX
- What is changing
 - Every Alma customer is on the same software version at all times
 - Cloud hosted, multi-tenant
 - Monthly updates
 - Web-browser based, no Windows clients to load and manage
 - Alma has a “Network Zone” that offers a variety of consortial services-not just a union catalog or resource sharing tool



Data

- What is not changing
 - MARC data for bibs and holdings
- What is changing
 - Network Zone is more than a union catalog
 - E-resources are activated rather than loading bibs or using link resolver access
 - Patron data and staff logins will typically be authenticated against campus services



What to Expect During a Data Migration

- Most Voyager and VuFind functionality will continue to be available until we have to take the final “snapshots” of data to move to Alma in Spring 2020
- We will set dates beyond which you should not/cannot do tasks in Voyager as that work will not be transferred to Alma
 - Acquisitions and cataloging work in Voyager will cease
 - New UB requests will cease to be placed
 - New local circulation will cease (and you will use the offline circ option)
- Data from Voyager will be loaded into Alma, we will verify that all data moved, upload the offline circ, and go live on Alma !

People



- What is not changing
 - Patrons can still place requests, view their account activity
 - CARLI staff will still provide ongoing support to member libraries
- What is changing
 - Patron and library staff authorization works with campus identity services
 - Staff privileges are role-based, a staff member's privileges can include one or more roles
 - Training is largely online and self-paced
 - CARLI will have a large, but limited, number of staff user accounts for libraries, so we will more actively encourage libraries to delete unused staff logins

A Bit About the Cost

- The annual consortial Alma and Primo VE license fee we will pay to Ex Libris is set for the next ten years for all 91 I-Share libraries
- Our Ex Libris contract has an annual price increase cap of 3%
- I-Share assessments have been set for the next several years and are posted on the CARLI website



Our Consortium has been through 40 years of Changes: *We CAN Do This!*

- CARLI's resource sharing program dates back to 1980!
- We implemented Voyager in 2002 for 44 institutions. Since then 47 more institutions have moved to I-Share from other systems
- Perhaps you have previously been through a system change?
 - Were you on staff when your library implemented Voyager? Or DRA, LCS...?
 - Have you worked at libraries that used library management systems other than Voyager?
 - Have you worked with Alma and/or Primo VE in other libraries?
- This is a transformational change, not just a new catalog!

The Alma Primo VE Full Test Load: An Overview of the Tasks, Deadlines, and Outcomes

- Test load is a full test migration of all Voyager and link resolver data for all 91 I-Share libraries
- Test load preparation work in summer 2019
- Almost everything we set in Test can be changed for the final Production load in Spring
- Test environments to be available to you by late October



Working With Test Data and Worksheets: The Box File Sharing Service

- CARLI will be using the Box file storage and sharing service to provide libraries with worksheet forms, etc., and to receive uploaded completed forms from libraries
- An email “invitation” to Box is being sent to each I-Share library’s Alma/Primo VE contact
- A designated folder has been established for each I-Share library
- Please confirm you can access your library’s folder on Box as soon as you receive your invitation and let CARLI know if you have access problems

Voyager Locations Report and Worksheet

- Spreadsheet of locations your institution uses/used in Voyager is in your Box folder
- Download and review it with staff that work with e-resources and Voyager locations
- Indicate in the spreadsheet which locations your institution uses for e-resource bibliographic records in Voyager
- **DEADLINE:** Save and upload completed ***e-resource locations*** form to your Box folder by June 4, 2019
- **DEADLINE:** Save and upload completed locations worksheet for ***all locations*** by July 23, 2019

P2E, the “Print to E-Resource” Process

- CARLI will run a report on all the locations that you have indicated are used for e-resources and provide the reports in your Box folder
- You will review the report and make any changes, and upload the revised report to your Box folder by July 9, 2019
- Ex Libris will transform these bib records into e-resource records when they load your data
 - These materials can then be managed as e-resources with license and access terms, etc.
- CARLI will provide a webinar on P2E in early June
- **DEADLINE: Completed P2E worksheets are due to be uploaded to your Box folders by July 9, 2019**

Migration Worksheets

- Migration worksheets help Ex Libris identify what data you will migrate and some of the settings that will be configured in Alma
- Building on our Vanguard experience, CARLI staff have revised this form to be a bit easier to use and we are pre-populating it with answers that are standard for all I-Share libraries, and other recommended responses
- CARLI will distribute the Migration Worksheets and hold a webinar on how to complete them in early June 2019
- **DEADLINE: Completed Migration Worksheets must be uploaded to Box by July 23, 2019**

Link Resolver Data (If You Use ProQuest/Ex Libris SFX or 360)

- Link resolver data is used to help define which electronic collections and titles you will manage in Alma
- If you currently use SFX
 - CARLI will do the export for you
 - See [https://www.carli.illinois.edu/SFX ALMA](https://www.carli.illinois.edu/SFX_ALMA) to learn how to review your active targets/collections
- If you use the ProQuest 360 tools (aka Serials Solutions)
 - You will export your data following Ex Libris' instructions, see
 - [https://knowledge.exlibrisgroup.com/Alma/Implementation and Migration/Migration Guides and Tutorials/360 and Intota to Alma Migration Guide](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/360_and_Intota_to_Alma_Migration_Guide)

Link Resolver Data (If You Use Other Products)

- If you use other products, e.g., EBSCO Full Text Finder or OCLC WorldShare License Manager
 - You will work with an Ex Libris spreadsheet to identify your e-resources in the “Link Resolver to Alma Activations” worksheet
 - Review the documentation at:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Link_Resolver_to_Alma_Activations
- CARLI will have a webinar on link resolver migration in early June
- **DEADLINE: Link resolver data and worksheets must be completed and uploaded by July 23, 2019**

Configuration Worksheets

- Configuration worksheets define many of your circulation policies (called Terms of Use, TOU's in Alma) for patrons and their access to your collections
- These forms are generated by Ex Libris from your completed Migration Forms, so they should be available in early August
- CARLI will have a webinar about the Configuration Worksheets at a date TBD
- **DEADLINE: Completed Configuration Worksheets must be uploaded to Box by September 4, 2019**

When You Get Your Test Environment

- Ex Libris expects Test environments to be available for all I-Share libraries by mid- to late October 2019
- It will contain all your Voyager data, plus any e-resource data you migrated from your link resolver, and will reflect the setting choices you made on the worksheets
- You will review your data, settings and policies and note changes you wish to make before the final Production Load and report these to CARLI
- You will use your Test environment to conduct in-house training
- You can use your Test environment to test product integrations (e.g., sending and receiving data from campus systems, self-check stations, etc.)



Your Next Steps



What Your Library *Should* Be Doing Now

- Identify your project leader and team
 - Alma/Primo VE primary contact person for CARLI communications
 - Acts as library's internal migration project manager
 - Responsible for your library to meeting deadlines
 - Person(s) with knowledge of your acquisitions & cataloging practices, Voyager locations for physical and e-resources, circulation policies
 - Person(s) to coordinate your in-house Alma and Primo VE training
 - Person(s) to work with your institution's IT staff on authentication, printing, integrations with your student information system(s) and fiscal management systems
- If you are a small institution, these may be the whole staff or may all be the same person



Start the Tasks with Deadlines First

- **ASAP:** Make sure your library's Alma/Primo VE contact can access your Box file folder
- **June 4:** Identify your Voyager e-locations
- **July 9:** P2E worksheet due
- **July 23:** Complete the full locations worksheet
- **July 23:** Link resolver work (for 360, EBSCO and OCLC link resolver customers) due
- **July 23:** Migration worksheet due
- **September 4:** Configuration worksheet due



What Your Library *Should* Be Doing Now

- Data cleanup
 - Refer to the cleanup priorities on the CARLI website, focus on more critical tasks, as indicated
 - Run reports to see what and how much cleanup is needed;
 - If you are not comfortable with Voyager reports, ask CARLI for help
- Patron record purge to eliminate long-expired patrons
- If you (and your colleagues and predecessors) have followed data standards and best practices, you will not have as much cleanup to do
- If you have used non-standard, local practices; discuss these with CARLI for recommendations



What Your Library *Should* Be Doing Now

- Know what systems and products currently interact with Voyager at your institution
 - Student data, billing, electronic ordering
- Start talking with your institution's IT staff about what authentication method(s) your institution can use for Alma and Primo VE
 - See the technical resources at
 - [https://knowledge.exlibrisgroup.com/Alma/Implementation and Migration/Implementation Guides/03 Technical Requirements for Alma and Discovery Implementation](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides/03_Technical_Requirements_for_Alma_and_Discovery_Implementation)
 - [https://knowledge.exlibrisgroup.com/Alma/Implementation and Migration/Implementation Tutorials/03 Alma Integrations with External Systems](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Tutorials/03_Alma_Integrations_with_External_Systems)



What Your Library *Should* Be Doing Now

- Start getting familiar with Alma and Primo VE
 - All Ex Libris training is online and does not require a login; you can start learning now
 - <https://knowledge.exlibrisgroup.com/>
 - Ex Libris requires staff that will do “configuration” work for their library in Alma or Primo VE to complete a “certification” program (also online)



More Training Resources

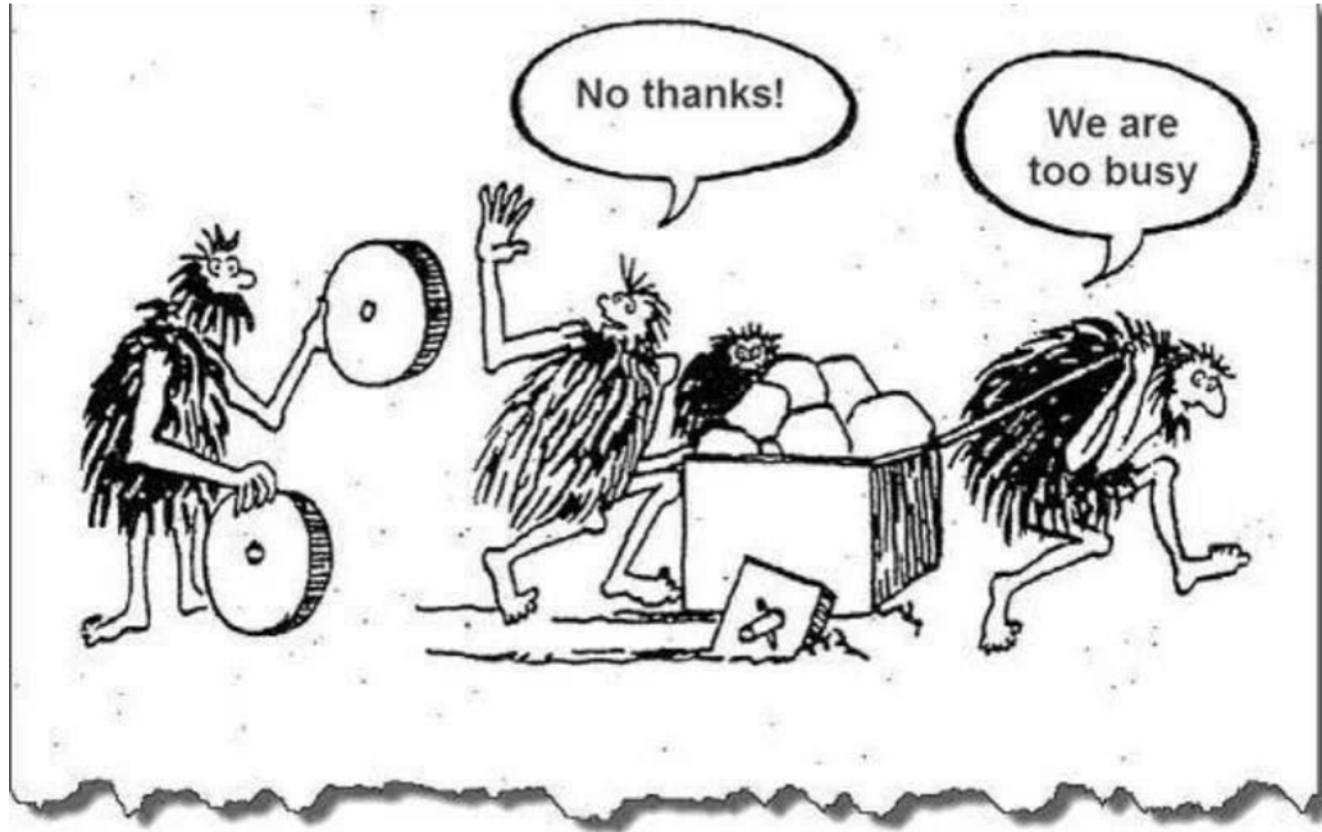
- Ex Libris' "Getting to Know Alma" (online webinar sessions)
 - Basic webinar series designed to help you understand the functional areas of Alma, learn basic Alma vocabulary, and become familiar with day-to-day workflows in Alma before you begin implementation
Register here:
<https://proquestmeetings.webex.com/proquestmeetings/onstage/g.php?PRID=8efd9300896f0a4c507bd73798d56388>
- Ex Libris' Alma Essentials (online only)
 - https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials
 - Self-paced, short videos that introduce the functionality
 - CARLI will provide access to a generic Alma Sandbox for training; and you will use your test environment after it is provided
 - Ex Libris has developed exercises to accompany these sessions
- Ex Libris' Alma Implementation Training (webinars)
 - Live/recorded webinars to focus on detailed functionality and workflows
 - Training series will be provided by Ex Libris around the time the Test Load completes
- CARLI is working with Ex Libris to schedule several in-person workshops around the state after the Test Load data is available (these will assume attendees have watched the Alma Essentials videos)



Alma Certification Training

- Training course required for library staff that will administer and configure their institution's Alma and Primo VE environments
- Self-paced, online training
- Use with your test environment
- CARLI staff will also have certification and be able to assist libraries that do not have Alma and/or Primo VE certified staff

Start *Now* on your Alma and Primo VE Training and Planning Tasks



Don't be like these guys!

Moving from Voyager to Alma/Primo VE is a major operational transformation and the transition is going to be somewhat disruptive to your library and staff.

- Somedays you may have a lot of questions...
- Other days you might not even know what questions to ask...
- You may worry about your decisions...
- Remember, this is a *test* load; you will have a chance to make changes for the Production load and after we are live on Alma!



Please Ask for Help, We All Learn from Your Questions

- CARLI staff are learning, too, please be patient with us during this major change
- Please send your questions to us through our support@carli.illinois.edu address
- Please remember that there are 91 I-Share libraries, all have these same tasks and deadlines. Please don't wait until the deadline to start your work and ask questions.
- If your library simply *cannot* accomplish a task or meet a deadline, let us know as soon as possible *before* the deadline so that we can provide default settings for your library when possible.



Thanks for watching! Now let's get started on I-Share's move to Alma and Primo VE!

