

I-Share Alma Migration/Implementation Form

This form should be submitted once by the I-Share library's Alma/Primo VE Contact no later than 5pm on July 23, 2019.

If you have any questions, please contact CARLI at support@carli.illinois.edu

Questions marked with a red * are Required.

Your Name *

Your email address *

I-Share Library Code *

ABOUT YOUR LIBRARY

1. What are the resource sharing / interlibrary loan / direct borrowing programs, networks, or systems with which you currently work? *

For example: OCLC Navigator, ILLiad, or indicate None

2. Are you using self-check services? Please answer Yes or No. *

If Yes, indicate the vendor, for example: 3M, Bibliotheca

3. Does your library have special collections, archives, or storage facilities? Please answer Yes or No. *

If Yes, provide details regarding the nature of the materials and indicate if there are any third-party applications involved (e.g. remote storage facilities or automated storage)? If so, provide details regarding these applications. (For example, indicate whether the integration is file-based or API-based and also if it is a storage solution other than GFA or HK/Dematic ASRS).

4. Alma allows defining Reading Rooms, which are special viewing areas for which restricted materials can be requested and in which they can be reviewed. Do you have similar functionality in your current system? Please answer Yes or No. *

If Yes, describe your current workflow.

5. Do you currently allow digitization/photocopy requests from patrons? Please answer Yes or No. *

If Yes, provide details of this workflow.

6. Are you using Voyager Media Scheduling? Please answer Yes or No. *

If Yes, please provide details. Is it being used within the library or by an outside department at your institution?

Please note that Voyager Media Scheduling will not be migrated to Alma.

7. Do you currently update your Voyager bibliographic data from external sources/systems (other than OCLC)? Please indicate Yes or No. If Yes, answer the following questions for each source/system: *

- a. What source/system do you regularly update from and what is the purpose of the update?
- b. Is the update currently done in batch load or in real time? What protocols are used to access the data?

- c. What is the frequency of update?
- d. What data format does the system supply (MARC21, other)?
- e. Is the update incremental (new/updated/deleted records only), or is it a full data re-extract and replace?

8. Are there any external systems (apart from OCLC and HathiTrust) to which Alma bibliographic and/or holdings data should be exported? Please indicate Yes or No. If Yes, answer the following questions regarding each system: *

- a. What is the purpose of the export?
- b. What is the frequency of the export?
- c. Is the export incremental (new/updated/deleted records only), or is it a full data re-extract and replace?
- d. Is the export intended for a specific subset of your data?
- e. What data format does the system require?

9. Does your library use 360Link/Core and want to migrate data to Alma? Please answer Yes or No. *

If Yes, please consult the CARLI webinar "Link Resolver and Data Migration: Preparing Your Data" and accompanying documentation at <https://www.carli.illinois.edu/products-services/i-share/alma>

Please indicate below any specific issues you would like Ex Libris to be aware of.

10. Does your library use 360RM or Intota and want to migrate data to Alma? Please answer Yes or No. *

If Yes, please consult the CARLI webinar "Link Resolver and Data Migration: Preparing Your Data" and accompanying documentation at <https://www.carli.illinois.edu/products-services/i-share/alma>

Please indicate below any specific issues you would like Ex Libris to be aware of.

11. If you are using 360 Counter or Intota Assessment to manage COUNTER data, would you like to migrate your COUNTER data to Alma? Please answer Yes or No. *

12. Regarding your library's migration from Voyager to Alma, indicate below any special requirements / issues that you would like Ex Libris to be aware of (for example, unique customizations, special integrations).

13. Please provide any additional information that is unique to your Voyager setup.

ABOUT YOUR INSTITUTION

14. Do you currently upload end-user (patron) information into Voyager from a Student Information System (SIS) at your institution? Please answer Yes or No. *

If Yes, what source system are you currently using?

15. In Alma and Primo VE, users must authenticate via an external system. Alma libraries generally integrate with their campus authentication system. Of the following options supported for integration, which authentication method(s) does your institution use or plan to implement? *

- * Lightweight Directory Access Protocol (LDAP)
- * Shibboleth (SAML)
- * Central Authentication Service (CAS)
- * None of the above (please explain)

16. What financial/accounting system does your institution use? *

For example, Enterprise Resource Planning (ERP) or Banner.

17. If applicable, provide details regarding the exporting of invoices to the financial/accounting system and the receipt of invoice payment confirmation from this system (for example, file-based or API-based).**18. If applicable, provide the list of vendors with which you communicate via EDI. Specify the EDI messages that you are using to communicate with the vendors (such as sending of orders, import of invoices).**

ABOUT YOUR DATA

19. List the prefix for SFX or other link resolver system record numbers. *

The migration program will look for the string in the bibliographic record 035 \$a field and skip records where the string is found.

If your library uses SFX through CARLI for your link resolver system, then put '(SFX)' here.

If you use a different link resolver system other than SFX and have bibliographic records for e-resources in Voyager from that system, put the prefix string that indicates bibliographic records from that system here.

If you do not use a link resolver, put "None".

Multiple strings are allowed, separated by semicolon, for example:

(SFX);(WaSeSS);ssj;ebrary

20. What is the MARC Organization Code for your institution? *

If you do not know your MARC Organization Code, you can look it up at:

<https://www.loc.gov/marc/organizations/org-search.php>

This code is used to build a prefix for the former Voyager system number in a 035 subfield a.

Institutions that have more than a one MARC Organization code should choose one for use in conversion. Typically, there is one that represents the institution as a whole. Ex Libris strongly recommends that all customers use their MARC Organization Code when migrating to Alma, as it helps identify the owner of the record. If you do not have a code or do not want to use one, fill in the word Voyager.

21. Specify the subfield to which 852\$c data will be moved. *

If you have data in your Voyager holdings record 852 \$c, it must be moved to a different subfield to accommodate the two levels of location in Alma: the Alma Library and the Location are in 852 \$b and \$c.

The migration will move any data in 852 \$c to the subfield specified here. CARLI strongly recommends that you clean up 852 \$c data prior to migration; see the Pre-Migration Database Maintenance page at: <https://www.carli.illinois.edu/products-services/i-share/alma/datacleanup>

22. Do you want to use the Price entered in the Voyager Item Record as the actual replacement cost if an item is lost by a patron? *

- Yes - Use the Voyager Item's Price field to calculate a replacement fine.
- No - Do not use the Voyager Item's Price field. The value in the Price field will be migrated as a note for future reference but will not affect the patron's replacement fine.

23. Specify bib tags which will be marked as local.

You may specify bib tags to be marked as local in your Alma Institution Zone (IZ). You may specify tags plus indicators. Use '#' to specify any value, and 'b' to specify a space. Separate multiple tags by semicolon.

Allowed local fields are 09X, 59X, 69X, 9XX. No other fields may be marked as local.

Example input: 69###; 590b#; 595## (which means 69X fields with any indicators, 590 fields with first indicator blank, and 595 fields with any indicators)

24. Do you want to migrate course reserves data from Voyager to Alma? *

"Active" means that the course end date is blank or the date of migration is within the active date range in Voyager.

- Yes - Migrate all course reserves
- Active only - Migrate only course reserves and reading lists for active courses.
- No - Do not migrate any course reserves

ABOUT P2E AND ELECTRONIC RESOURCES

25. Which Holding or Bib field stores electronic link information? *

Input the 3-digit MARC field and subfield.

The default is 856 \$u.

26. Which Holding or Bib field stores electronic link public note? *

Input the 3-digit MARC field and subfield.

The default is 856 \$z.

27. Which Holding or Bib field stores electronic provider name information? *

Input the 3-digit MARC field and subfield.

The default is 856 \$3.

Your library may have also stored these data in Bib fields 791, 793, or 797 (subfield a).

28. Do you want the P2E process to include suppressed bibliographic records from Voyager? *

During the P2E process, the migration programs look for the bib that is listed in the P2E file, and any holding/item which is in a location marked as electronic will be changed to electronic. The P2E migration can ignore (not make any electronic resource for) any bibs which are suppressed, in case a bib was added to the P2E file by mistake.

For more information on P2E, please see the CARLI webinar "Introduction to the P2E Process" and accompanying documentation at <https://www.carli.illinois.edu/products-services/i-share/alma>

Yes = Include suppressed bibs in the P2E process. An electronic resource will be created, and the bib will continue to be suppressed in Alma.

No = Do not include suppressed bib records in the P2E process. Suppressed bibs will be migrated to Alma as physical holdings (bib, mfhd, and item) and continue to be suppressed; they will not be migrated as electronic inventory.

- Yes - include suppressed bibliographic records
- No - do not include suppressed bibliographic records

29. Do you want the P2E process to include suppressed holding records from Voyager? *

During the P2E process, the migration programs look for the bib that is listed in the P2E file, and any holding/item which is in a location marked as electronic will be changed to electronic. The P2E migration can ignore (not change) any holdings which are suppressed, or they can consider the suppressed holding as active for the P2E process only. Keep in mind if we make a resource from a suppressed holding record, the resulting electronic resource will not show as suppressed in Alma.

Choosing Yes will include suppressed holdings in the P2E process. The generated e-resource will not be suppressed.

Choosing No means that the P2E process will not consider suppressed holdings when looking for holdings to convert to electronic, and will make an e-resource from other electronic entities on the bib or from the bib itself.

- Yes - include suppressed holdings records
- No - do not include suppressed holdings records

30. What type of proxy server are you using to provide access to electronic resources? *

For example: EZproxy, libproxy, etc.

If you are using more than one proxy server, please indicate all of them.

If you do not use a proxy server, indicate None.

31. What is the linking string for your proxy? *

For example: http(s)://proxy.insitution.edu/login?url=

If you do not use a proxy server, indicate None.

32. What is the IP address of your proxy server? *

If you do not use a proxy server, indicate None.

33. If possible, please provide test user credentials (i.e., a user that can authenticate to the proxy but has no other permissions). *

If you do not use a proxy server, indicate None.

If you feel more comfortable submitting credential information directly to CARLI, please indicate in the box below that you will send the information separately, and the email support@carli.illinois.edu with the Subject Line: "proxy configuration for Alma" with the test credentials.

ABOUT YOUR PATRON DATA

34. Which identification number should be used by patrons as the primary identifier? *

Select which identifier will be used as the primary identifier for your patron records. If you will be doing patron batch loads into Alma from your institution's registration systems (i.e. Bursar or SIS), make sure the value you choose as the primary identifier in Alma matches the value your registration system considers to be the primary unique identifier for your patrons.

Institution ID is the most common choice for libraries who perform patron batch loads.

The most recent Active Patron Barcode in Voyager is the other option. If the patron does not have an Active barcode, Alma will use patrons' most recent Inactive barcode from Voyager.

OTHER is the value from the SSN field in the Voyager patron record. Customers sometimes use the SSAN field in Voyager for an institutional identifier that is NOT the Social Security Number (SSN). It is illegal to use the SSN for identification purposes, so if you choose OTHER for this question, you are agreeing that this field does not contain an SSN.

- Institution ID
- Most recent, Active Patron Barcode
- Other (SSN field)

35. Augment the patron record's primary identifier? *

During the migration from Voyager to Alma, you can have Alma add a prefix or a suffix to your patron records' primary identifier. After migration, libraries will likely load patron records into Alma from their local bursar's system or student information system (SIS). In order to ensure a proper patron match, libraries must be certain that an identification number in Voyager will migrate to Alma as a matchable identification number in Alma – typically, the identification number in Alma must match an identification number available to LDAP, Shibboleth, or some other external authentication system. The LDAP or Shibboleth identification number is often different than the regular Institution ID, and the difference is almost always indicated by a prefix or suffix.

- Yes, add Prefix
- Yes, add Suffix

No

36. If you answered "Yes, add Prefix" or "Yes, add Suffix" to the above question, list the text string that should be added below.

37. Are any of the identifiers used to identify your patrons not unique among the patrons of your institution? If you have such cases, please provide details.

38. Does your library have patron groups whose records will not be added by batch load? *

Many I-Share libraries have a few patron groups where the records for those patron groups are added to Voyager manually, not as a part of a patron batch load. List the patron group codes at your library where staff add the associated patron records manually in Voyager. Separate them with a comma.

Example: AL,LH,PP,PH

These codes are case-sensitive, so be sure the capitalization is the same as the code in the Voyager database.

If you do not add any patron group records manually, indicate "None".

39. If a patron record has no expiration date in Voyager, the migration will set a default expiration date in Alma. Choose which date to use below. *

Indicate the date in the format YYYYMMDD

CARLI recommends that you choose an expiration date prior to or within a year of migration to Alma.

ACQUISITIONS QUESTIONS REQUIRED FOR ALL I-SHARE LIBRARIES

Questions 40 - 45 must be answered by ALL I-Share Libraries, even if you are not migrating any Voyager Acquisitions data to Alma.

40. Do you want to migrate suppressed serial issues data? *

Serial issues that are migrated from Voyager to Alma will create new item records in Alma. In Alma, item records contain the check-in history.

Decide if serial issues checked-in in Voyager Acquisitions that are flagged as suppressed from OPAC view in Voyager should be migrated to Alma. In the Voyager Acquisitions client, this is specified on the Receipt History tab where the "Display in OPAC" column says "No".

If you answer Yes to this question, these issues will migrate to Alma as new item records with their receipt history and be unsuppressed with a note that they were suppressed in Voyager so that you can find them after migration and re-suppress them.

If you answer No to this question, check-in information and receipt history for the suppressed

issues is lost because the suppressed issues are not migrated to Alma.

Issues that have been collapsed (those in the Receipt History tab where the "Collapsed" column says "Yes") are not migrated no matter how you answer this question.

If you do not have any checked-in serial issues in Voyager Acquisitions, answer No.

- Yes - Serial issues marked as "OPAC suppressed" in Voyager will be migrated to Alma as unsuppressed with a note indicating that they were suppressed in Voyager.
- No - Do not migrate suppressed serial issues; receipt history is also not moved to Alma.

41. Do you want to generate a system-formatted barcode for serial issues? *

The migration to Alma can generate an item barcode for issues checked-in in Voyager Acquisitions based on the serial issue and component identifiers. However, this barcode is not mandatory and the items created from serial issues can remain without a barcode if desired.

If you do not have any checked-in serial issues in Voyager Acquisitions, answer No.

- Yes - Generate a system-formatted barcode for serial issues
- No - Do not generate a system-formatted barcode for serial issues

42. Indicate your Fiscal Period Cycle Pattern using the format DD-MM-C *

This question is mandatory even if your library is not migrating any Acquisitions data to Alma.

DD is for the two-digit day.

MM is for the two-digit month.

Alma only supports one-year fiscal cycles, so C in the pattern DD-MM-C will always be 1.

For example, a one year fiscal period starting on January 1st is indicated as 01-01-1. A one year fiscal period starting on July 1st is indicated as 01-07-1.

43. Which year do you use to name the fiscal year? *

This question is mandatory even if your library is not migrating any Acquisitions data to Alma.

If your fiscal period runs July 1 2018 through June 30 2019, and your fiscal year is named '2018' or 'FY18', select "first".

If your fiscal period runs July 1 2018 through June 30 2019, and your fiscal year is named '2019' or 'FY19', select "second/last year".

- first
- second/last year

44. Which fiscal year is your current fiscal year? *

Valid value: YYYY or "by date of conversion"

The answer to this question may depend on whether or not you will run fiscal period close in Voyager before the migration to Alma, or if you will run it in Alma after migration.

If you do not know how to answer this, input "by date of conversion". In this case, Alma makes the active fiscal period the one that contains the date of conversion.

45. Does your library want to migrate Voyager Acquisitions data? *

If you answer "None", you may skip the remainder of the questions in this survey as they only apply to I-Share libraries that are migrating Acquisitions Data.

If you answer "Full" or "Partial", you must answer all of the remaining questions in this survey.

- Full - Full Acquisitions
- Partial - Vendors, Funds, and Purchase Orders only (no Invoices)
- None - No Acquisitions

ACQUISITIONS QUESTIONS ONLY FOR I-SHARE LIBRARIES MIGRATING VOYAGER ACQ DATA

Questions 46 - 56 are required for I-Share Libraries that choose to migrate "Full" or "Partial" Acquisitions data. If you answered "None" and will not be migrating any Acquisitions data, you may skip the remaining questions in this survey.

46. Indicate if you want to automatically close purchase orders that are NEW and older than N years.

Enter a number from 0 to 5 years.

Enter 0 if you do not want any POs to be automatically closed by the migration to Alma.

CARLI recommends closing purchase orders that are NEW and older than 1 year.

47. Indicate if you want to automatically close purchase orders that are SENT and older than N years.

Enter a number from 0 to 5 years.

Enter 0 if you do not want any POs to be automatically closed by the migration to Alma.

CARLI recommends closing purchase orders that are SENT and older than 1 year.

48. Indicate if you want to automatically close purchase orders that are single part (0), have been invoiced, and are older than N years.

Enter a number from 0 to 5 years.

Enter 0 if you do not want any POs to be automatically closed by the migration to Alma.

CARLI recommends closing purchase orders that single part (0), have been invoiced, and are older than 1 year.

49. If you migrate Voyager Acquisitions data, you may choose a Central Ordering Library.

You may choose to override the ORDER_LOCATION for purchase orders and designate a central ordering library for ALL purchase orders. If so, enter a valid Alma Library code here. If not, fill in the following Default Order Library question below.

The ORDER_LOCATION field specifies the order location for orders in Voyager. The migration attempts to map the ORDER_LOCATION field to the corresponding Alma Library. If you want to override this ORDER_LOCATION field and instead assign an order library to all orders migrated, enter a library code value for this Central Ordering Library question.

Otherwise, if you want to use the ORDER_LOCATION field to determine the order library, leave this Central Ordering Library question blank and enter a library code value in the Default Order Library question below.

Additionally, if the Central Ordering Library is set here, funds and vendors use the Central Ordering Library and no attempt is made to determine an ordering library list from the Voyager funds and ledgers.

50. If you migrate Voyager Acquisitions data, you may choose a Default Order Library

If you do not specify a Central Ordering Library in the question above, then enter a valid Alma Library code for the Default Order Library to use if ORDER_LOCATION is blank.

The ORDER_LOCATION field specifies the order location for orders in Voyager. The migration attempts to map the ORDER_LOCATION field to the corresponding Alma Library.

If you want to use the ORDER_LOCATION field to determine the order library, leave the Central Ordering Library question above blank and enter a library code value in this Default Order Library question. In this case, the migration attempts to determine the library based on the ORDER_LOCATION field and only when a library is not specified or a mapping is not found does it use the default order library.

If you want to override this ORDER_LOCATION field and instead assign an order library to all orders migrated, enter a library code value for the Central Ordering Library question above and leave this question, Default Order Library, blank.

51. Renewal Date for Active Subscriptions

If a date cannot be found during migration, choose the default renewal date for active subscriptions in the form YYYYMMDD

52. List the PO Type which indicates a Legal Deposit order

If your institution has orders that are considered legal deposit, and you have created a PO Type in Voyager specifically for them, list that PO type name here. These orders will be migrated to Voyager as legal deposit.

53. Do you want classic prediction patterns migrated from Voyager to the Alma holding record?

Only regular (classic) prediction patterns are migrated; complex patterns are not migrated to Alma. Alma allows for a single prediction pattern per holding record, so if there are multiple patterns on a single holding in Alma, duplicate holdings are created.

If you are using Voyager Acquisitions serials check-in, CARLI recommends choosing "Current".

- Current - An 853/854/855 tag will be added to the Alma holding record for current classic prediction patterns, and an item will be created for the next expected issue.
- Current and Historical - An 853/854/855 tag will be added to the Alma holding record for current classic prediction patterns, and an item will be created for the next expected issue and the same information will be added for closed patterns.
- None - Do not migrate classic prediction patterns

54. If your library uses accrual accounting, you can make an additional fiscal year during the migration process.

When an additional fiscal year is created, it will be after the current fiscal year. For example, if the current active fiscal year is 2016, then the additional year will be 2017.

- No - do not make an additional fiscal year
- Yes - make an additional (active) fiscal year

55. Do you want to merge vendors with the same vendor code?

It is possible to merge vendors which have the same vendor code in Voyager into a single vendor in Alma. If vendors are merged, vendor account information from all merged vendors

will be retained, but everything else will be kept only from the first vendor found in the export file.

CARLI recommends that you choose "No" and do NOT merge vendors. As a reminder, CARLI also recommends cleaning up your vendor records in Voyager prior to the test load, because vendor records are only loaded once. Please see: https://www.carli.illinois.edu/products-services/i-share/alma/acq_vendor_maintenance

- Yes - merge vendors
- No - do not merge vendors

56. How do you want to migrate your Reporting Funds?

Instead of using reporting funds, Alma uses a reporting code. The reporting code is stored on the transaction record (encumbrance or expenditure) and in the purchase order and can be reported on for statistical purposes. Libraries migrating from Voyager may decide to convert reporting funds to reporting codes (MAP), they may decide that the reporting funds be converted into actual allocated funds in Alma (ALLOC), or they may choose to not migrate reporting funds at all and have all of the fund transactions be assigned to the reporting fund's allocated fund parent (DONOTTRANSFER).

Choosing MAP will translate existing Voyager reporting funds to the reporting codes field in Alma. Reporting funds' transactions will be assigned to the parent allocated fund. You will be able to change the reporting codes after your library is live on Alma, if desired.

Choosing DONOTTRANSFER means your library will not use reporting codes in Alma at all. During migration, Voyager reporting funds' transactions will be assigned to the parent allocated fund in Alma. The reporting code field in Alma will be left blank, and all other information about reporting codes in funds from Voyager will not migrate be lost.

Choosing ALLOC will change the reporting fund in Voyager into an Allocated fund in Alma, and all transactions are assigned to that allocated fund and no reporting codes are created in Alma.

- MAP - Voyager reporting funds will be mapped to Alma reporting codes.
- DONOTTRANSFER - Do not transfer Voyager reporting funds and use reporting codes in Alma at all.
- ALLOC - Change the Voyager reporting funds to allocated funds in Alma.

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