



CARLI Open Office Hours

ALMA PRIMO VE PROJECT UPDATE:
UPCOMING TASKS AND DEADLINES

March 5, 2020



GOALS OF THIS PRESENTATION

- You will be aware of the project deadlines and how they impact your work.
- You will know where to find these deadlines on the CARLI website.
- You will have a basic understanding of how the tasks and deadlines build on each other.
- You will have access to a growing list of alternative tasks and workflows that you might use during “Freeze” periods.



WE ARE ON SCHEDULE!

- We have met all project deadlines so far.
- The project tasks and deadlines we are sharing today are very similar to the information we have shared previously, e.g., at the 2019 CARLI Annual meeting.

Thanks to everyone working together,
we are on schedule to meet our
June 24, 2020 Go Live date!



LOOK AT JUST SOME OF WHAT WE HAVE ACCOMPLISHED!

Milestone	Dates
Contract signing	January 2019
Onboarding phase	January-February 2019
Vanguard phase	February-July 2019
All 91 libraries complete migration & configuration forms	July-September 2019
CARLI sends test data to Ex Libris	August-September 2019
Ex Libris creates 91 Alma test environments	September-October 2019
Libraries gain access to test environments	October 23, 2019
Test phase: Library staff review data and configuration settings, set up patron data (SIS) integration, authentication, printing, other <i>essential</i> “Day 1” integrations (services you connect to with Voyager)	November 2019 – April 2020
I-Share libraries get access to Primo VE	December 2019
CARLI licenses OpenAthens	January 2020
Ex Libris releases new Central Discovery Index	February 2020

QUICK SUMMARY OF UPCOMING MAJOR DATES AND DEADLINES

WHEN	WHO	WHAT
April 1	Library staff	Stop adding new locations and vendors to Voyager; stop adding new libraries, locations, vendors to Alma test environments
April 1	Library staff	Send changes to your Migration Form to CARLI
April 25	CARLI staff; library staff	Stop bib record bulk loads into Voyager; Libraries stop adding e-resource bibs and holdings to Voyager
May 1	Everyone	Voyager “Tech Freeze” begins: stop adding/updating/deleting all bibs, holdings, items to Voyager; stop updating acquisitions and serials data in Voyager. Voyager public catalog remains available, circ and UB continue, patron updates continue
May 1	Everyone	Alma Configuration Freeze begins: stop changing Alma configuration settings
May 1	Library staff	Libraries return updated P2E files to CARLI
May 8	SFX users	Stop updates to SFX
June 11	Library staff and patrons	Stop placing UB requests in Voyager; continue circ in Voyager
June 19	Library staff	Stop circulation in Voyager; optional- use Alma offline circ
June 24	Everyone	Live on Alma for all use!

THINGS THAT ARE NOT REPLACED BETWEEN TEST AND GO-LIVE

- Your Test environment *becomes* your production environment
- These data and settings remain from Test to Production:
 - Libraries
 - Locations
 - Vendor records
 - Configuration/policy settings
 - Integration profiles: SIS, authentication, self-check, etc.
 - Primo VE configurations
 - Staff users and roles



THINGS THAT ARE REPLACED BETWEEN TEST AND PRODUCTION

These are all *replaced* with a fresh copy of data when Test becomes Production

- All Network Zone (NZ) data
- All Institution Zone (IZ) bibliographic data, holdings, and items
- All circ status data
- All patrons (except staff users)
- All link resolver data being migrated



THINGS THAT MAY BE REPLACED BETWEEN TEST AND PRODUCTION

May be replaced or retained, depending on your institution's decisions

- Reserves
- Acquisitions data

These options apply only to libraries that have been performing acquisitions funds and ledger clean-up in **Alma**, or, reserves set-up in **Alma**.

Contact CARLI Support if this might apply to your institution.

DEADLINES IN MORE DETAIL



DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES

Date	Topic	Description
April 1	Data Update	Send changes to your Migration form to CARLI.
April 1	Voyager	Stop adding new locations and vendors to Voyager.
April 1	Alma	Stop adding new libraries, locations, vendors to Alma test environments.
April 22	Voyager	Last day to file any new Voyager work requests (WROs) for physical or electronic MARC record bulk imports or deletes.
April 25	Voyager	Last day that CARLI will run any new or ongoing bibliographic bulk import loads into Voyager.
April 25	Voyager	Libraries stop loading new e-resource bibs and holdings in Voyager.
April 25	Alma	Consortial AFN testing using ILDS Delivery to route Transit slips.

MIGRATION FORM CHANGES (IF NECESSARY)

- New Migration Forms are required by Ex Libris for the production cutover load.
- Any changes to the Migration Forms submitted during the test load must be received by CARLI by April 1.
- CARLI will be providing more information on how to submit any changes to Migration Forms in the near future.
- Some institutions may not require any changes to be made.

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DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- LIBRARIES, LOC, VENDORS

- Reminder that your Test environment *becomes* your production environment
- These data and settings remain in Alma from Test to Production:
 - **Libraries**
 - **Locations**
 - **Vendor records**
 - Configuration/policy settings
 - Integrations profiles SIS, authentication, self-check, etc.
 - Primo VE configurations
 - Staff users and roles
- To ensure your Voyager data matches your Alma data, stop making changes on April 1.

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DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- VOYAGER BULK

- April 22: Last day to file any new Voyager work requests (WROs) for physical or electronic MARC record bulk imports or deletes.
- April 25: Last day that CARLI will run any new or ongoing bibliographic bulk import loads into Voyager.
- April 25: Libraries stop loading new e-resource bibs and holdings in Voyager.



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DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES: AFN TESTING

- January 23: CARLI Office Hours on "Automated Fulfillment Network (AFN) similarities/differences to Voyager; call to begin testing."
- Early February: CARLI Office held seven live "Testing the AFN" sessions.
- Mid-February: I-Share libraries have begun AFN testing by partnering with another I-Share library to do targeted testing of each others' materials.
- March 10 through April 25: All I-Share libraries test the AFN setup, sending the transit slips through ILDS delivery.



DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES

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May 1 at 12:01am	Voyager	Technical Freeze starts Stop making any manual changes to inventory in Voyager (i.e., stop adding/deleting/editing bibs, MFHDs, items, POs, invoices, serials check-in, etc.), and stop setting “OK to export” to send holdings to OCLC WorldCat.
May 1	Alma	Alma Configuration Freeze starts Stop making any changes to Alma configuration settings
May 1	Primo VE/Alma	Stop making configuration changes to Primo VE
May 1	Data Update	Libraries return updated P2E files back to CARLI.
May 8	SFX	Libraries stop updating SFX.

DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- TECHNICAL FREEZE

- On May 1, library staff must stop technical service work in Voyager (acq, ser, cat) including loading link resolver data
 - Any adds, changes or deletes to bibs, items, holdings, PO's, funds, etc. in Voyager after the Freeze will NOT be moved to Alma/Primo VE
 - Backloading holdings to OCLC WorldCat through setting Voyager's "OK to export" flag on bibs will cease so OCLC and CARLI can adjust your Data Sync Collections to work with Alma. During the Freeze, set holdings through OCLC Connexion.
 - If you must make a change in Voyager after the Freeze, you must keep a record and re-do the work in Alma after Go Live.
- Circ and patron data work can continue in Voyager up until June 19



Resources for technical services staff working through the Technical Freeze:

- Ideas for Activities During the Technical Freeze

- <https://www.carli.illinois.edu/products-services/i-share/alma/technical-freeze-ideas>

- [Recommended Online Alma Trainings for Acquisitions and Cataloging](#)
 - [I-Share Network Zone Cataloging Recommendations](#)
 - [Post-Migration Workflow to Restore Special Collection Bibliographic Records](#)
 - *Coming Soon: Workflow for Importing an OCLC Connexion Local File to Alma.*

Remember you can continue to:

- Complete Alma/Primo VE Certification
- Learn more about Alma through online documentation and videos
- Use our generic Alma sandboxes for training and testing
 - <https://www.carli.illinois.edu/products-services/i-share/alma/sandbox>

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DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- ALMA CONFIGURATION FREEZE

- On May 1, all library staff and CARLI staff will stop making changes to Alma Configuration.
 - Ex Libris will turn off Configuration permissions for all users.
- Alma Configuration freeze in place until after go live on June 24.



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May 1	Alma	Alma Configuration Freeze starts Stop making any changes to Alma configuration settings
May 1	Primo VE/Alma	Stop making configuration changes to Primo VE
May 1	Data Update	Libraries return updated P2E files back to CARLI.
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Now – Be testing and evaluating your institution's Primo VE discovery interface!

Now through May 1 – Make any configuration changes to Primo VE.

- Many Primo VE resources on the [CARLI website](#) and [Ex Libris Knowledge Center](#).
- Institutions with Alma- and/or Primo VE-certified staff should make changes directly in Alma.
- Institutions without certified staff will be receiving more information from CARLI in future on how to submit changes.



How will you introduce Primo VE to users at your institution?

- [Ex Libris Knowledge Center Primo VE End User Help](#)
- April 2, 2020 – CARLI Public Services and Instruction Committees Event:
 - [Register for “Getting Ready for Primo VE” in-person forum at Joliet Junior College](#)
 - [Register for “Getting Ready for Primo VE” livestream option](#)

May 1 through May 22 – You may continue to access your institution’s Primo VE for training, testing, and demonstration purposes.

- After May 22, you may still use the five [CARLI Alma and Primo VE Sandboxes](#).



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May 1	Alma	Alma Configuration Freeze starts Stop making any changes to Alma configuration settings
May 1	Primo VE/Alma	Stop making configuration changes to Primo VE
May 1	Data Update	Libraries return updated P2E files back to CARLI.
May 8	SFX	Libraries stop updating SFX.

- P2E will include all electronic resources in the e-resources locations that you indicated last fall
- If you've added, changed, or identified any e-resource ***locations*** in Voyager since your first P2E report was created on July 23, 2019, please inform CARLI by April 20
- New P2E files will be provided to institutions via Box by 5pm on April 27
- The P2E files must be returned to CARLI by 5pm on May 1

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LINK RESOLVER DEADLINES

- SFX customers:
 - May 8 - SFX freeze on CARLI servers
 - May 11 - CARLI will extract data and provide to Ex Libris
- EBSCO link resolver customers:
 - April 16 - CARLI provides draft spreadsheets via Box
 - May 1 – Draft spreadsheets due back to CARLI
 - May 12 – EBSCO link resolver freeze
 - May 12 – Final spreadsheets due to CARLI
- 360 product(s) customers:
 - May 4 – 360 products freeze
 - May 4 – Libraries provide 360 reports to CARLI
 - May 11 – CARLI provides final reports to Ex Libris



DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES

Date	Topic	Description
May 22	Alma/Primo VE	Stop all Alma and Primo VE demo, testing and training activities.
June 11	Voyager	Stop placing UB requests, "request" buttons disabled in VuFind/WebVoyage.
June 15	Voyager	Last day for Voyager patron batch purges.
June 17	Voyager	Last day to file any new Voyager patron load WROs.
June 18 at 11:59pm	Voyager	Stop using Voyager Circulation.
June 19 at 12:01am	Voyager	Circ Freeze Starts Stop making any manual changes to patron records and circ status (adding/deleting/editing records, fines/fees, circ status).
June 19-24	Alma	I-Share libraries MAY opt to use Alma offline circ.

DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- ALMA AND PRIMO VE

- May 22 – Stop any data-related testing, training, or demo activities in your Alma and Primo VE test instance.
- Ex Libris will start work on the test instances in preparation for cutover to production.
- Do not log into Alma or Primo VE after May 22 until instructed to do so.
- Do use the [CARLI Alma and Primo VE Sandboxes](#) at any time.

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June 11	Voyager	Stop placing UB requests, "request" buttons disabled in VuFind/WebVoyage.
June 15	Voyager	Last day for Voyager patron batch purges.
June 17	Voyager	Last day to file any new Voyager patron load WROs.
June 18 at 11:59pm	Voyager	Stop using Voyager Circulation.
June 19 at 12:01am	Voyager	Circ Freeze Starts Stop making any manual changes to patron records and circ status (adding/deleting/editing records, fines/fees, circ status).
June 19-24	Alma	I-Share libraries MAY opt to use Alma offline circ.

DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- UB FREEZE

- On June 11, the CARLI Office will turn off the requesting buttons in WebVoyage, VuFind 0.6, and New VuFind.
- Why?
 - If the call slip is not yet filled by library staff, or,
 - If the item is in route to the pick-up library but not yet routed in for hold,
 - Then the transaction will not migrate to Alma.



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June 17	Voyager	Last day to file any new Voyager patron load WROs.
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June 19-24	Alma	I-Share libraries MAY opt to use Alma offline circ.



DEADLINE DETAILS FOR I-SHARE LIBRARIES: VOYAGER PATRON BATCH PROCESSES

- We stop using Voyager for circulation workflows on June 18, at 11:59pm.
- CARLI staff and library staff time is needed to process patron record batch purges and patron record batch loads.
 - June 15: Last day to submit a patron batch purge.
 - June 17: Last day to submit a batch patron load.
- Recommended and Required Patron record clean-up for Alma Migration.
 - <https://www.carli.illinois.edu/products-services/i-share/circ/secure/datacleanup-finesfeespatrons>

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DEADLINE DETAILS FOR ALL I-SHARE LIBRARIES- CIRCULATION FREEZE

- Work stops in Voyager Circulation, 11:59pm on June 18.
- Circulation Freeze begins midnight June 19!
- Alma Offline Circulation Client: Documentation will be available closer to the date.

SPECIALIZED DEADLINES

These deadlines will only apply to some I-Share institutions:

- March 25 Libraries must notify CARLI if they are concerned about the Network Zone Special Collection workflow not meeting their needs.
- April 22 If you use Voyager Acquisitions: Last date to request rollover/fiscal period close in Voyager via WRO.
- April 24 If you use Voyager Acquisitions: All rollovers in Voyager must be performed on or before April 24.

RESOURCES AND CONSIDERATIONS



- [Ex Libris Knowledge Center](#)
- CARLI's Alma Primo VE Webpages and Calendar
- CARLI's Alma Primo Contacts email list
- CARLI's monthly online newsletter
- CARLI's weekly open office hour webinar and recordings
- CARLI support support@carli.illinois.edu



THINGS TO CONSIDER

- Focus on the “Day One” essentials
- If you don’t use a functionality in Voyager now, you don’t need to start using it Day One in Alma
 - “Just because you can; doesn’t mean you should”
- Don’t forget the monthly Alma and Primo VE software updates, watch the release notes and CARLI notifications
- Remember your patrons, this is all ultimately for their benefit



Thank you!

Join us next Thursday
at 2pm for another
Office Hour



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

