I-SHARE ALMA PRIMO VE OFFICE HOURS WILL START SHORTLY

CARLI I-Share

ExLibris a ProQuest Company

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

OFFICE HOURS

5/21/2020

Agenda

- General Reminders and Project Updates
- Sandbox Refresher
- Data Review
  - Timeline
  - Finding Data
  - Checking Data

Upcoming Project Dates:

- Friday, May 22: Last day to test in your Alma/Primo VE instance until after Go Live
- **NEW May 23-25: Temporary Voyager Circ Freeze**
  - No Charge/Discharge; No adding/deleting/editing patron records, fines/fees, circ status
- Monday, June 15: Last day to file Voyager Patron Purge WRO
- Wednesday, June 17: Last day to file Voyager Patron Load WRO
- **NEW** June 17-19: Bib Load data review and acceptance
- Thursday, June 18 @ 11:59pm: Stop using Voyager Circulation
- Friday, June 19: Cutover Voyager Circ Freeze Starts
- June 19-24: Libraries may use Alma offline circ
- **NEW** June 22-23: Fulfillment Load data review and acceptance
- June 24: Go Live!

Project Update:

- All Voyager Data have been extracted and submitted
  - May 23-25 – Special Voyager Circ Freeze - Extract for additional test of Fulfillment Load “top off”
  - June 19 – Cutover Voyager Circ Freeze Starts – Fresh Fulfillment Extracts for “top off” Load
- P2E files submitted
- Updated Migration Forms have been submitted
- All Link Resolver Data have been submitted
  - SFX extracted and submitted for SFX Libraries
  - 360 Data Files submitted as provided
  - Non-Ex Libris (EBSCO/OCLC) libraries spreadsheet submitted as provided

- Sandbox Information

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

- CARLI has shared login information for all 5 Sandboxes via Box

(Filename: Alma Primo VE Sandbox Information for CARLI Libraries_NovemberRev.docx)

- These five sandboxes:
  - Are available for all I-Share institutions
  - Contain generic data and configurations
  - Are configured to mimic a consortial environment
  - Are not intended for load testing and have size limits and restrictions
  - Have not been refreshed since they were released last fall
  - Have a set of generic staff users with various role configurations
    - Allow more than one person to be logged in to a sandbox via the same staff username at the same time
  - Do not have the Analytics module

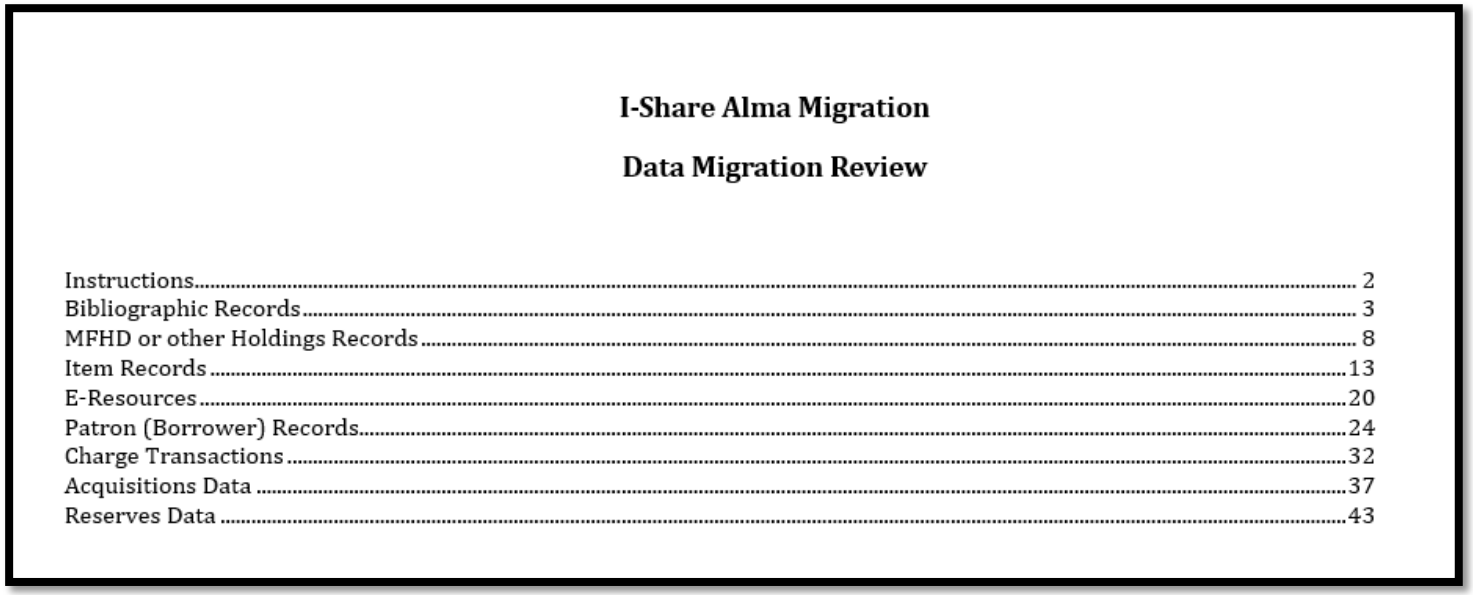
Best Practices and Good Etiquette for sharing the Sandboxes (Highlights)

- You are free to create your own examples (except for staff users).
- Please remove your examples when you are done.
- Do not delete anything you did not create.
- Preserve all existing training examples and configurations.
- It is ok to perform data imports, but please limit the size of these files to a small set of records
    - good rule of thumb is to test 1 record, then 10. If needed, then load more but keep the size under 100.
- Please do not change the roles for the set of generic staff user logins in the sandbox.

- Updated CARLI I-Share Data Review Webpage:

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

- Check the examples you found for the Test load: will they still work for the production load?
  - You will want new examples for Fulfillment review
- Find new and other examples if necessary, based on your experience during the Test load.



I-Share Alma Migration

Data Migration Review

Instructions 2
Bibliographic Records 3
MFHD or other Holdings Records 8
Item Records 13
E-Resources 20
Patron (Borrower) Records 24
Charge Transactions 32
Acquisitions Data 37
Reserves Data 43

- Ensure your data migrated appropriately
- Ensure your institution's data are there
- If you liked what you saw in Test, make sure the same thing happened this time
- If you made different choices for Production Migration, make sure the new choice was implemented
    - In Test Migrated Acq > In Prod Chose NO
    - Changed Any Location Mapping

- Look at your examples in Alma – do you see the same data?

Remember to consider if the Bib is now a Network Zone Bib

Check to verify your local fields (as selected on your Migration Form) appear local with this icon

- https://www.carli.illinois.edu/i-share/alma/prepare-datareviewsearch

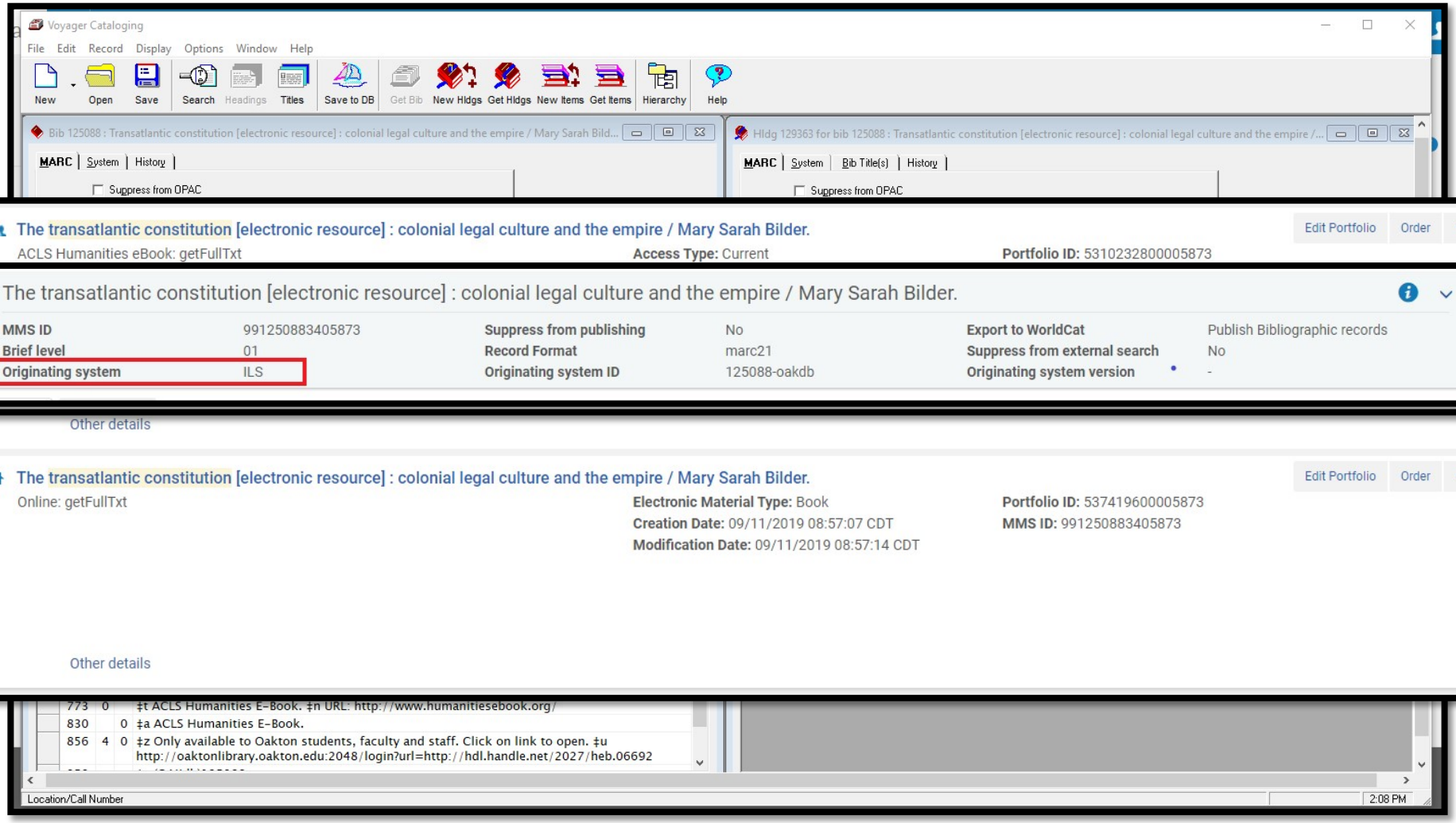
DATA REVIEW EXAMPLES – EXAMPLE ONE PUBLIC NOTE

Blink : the power of thinking without thinking / Malcolm Gladwell.

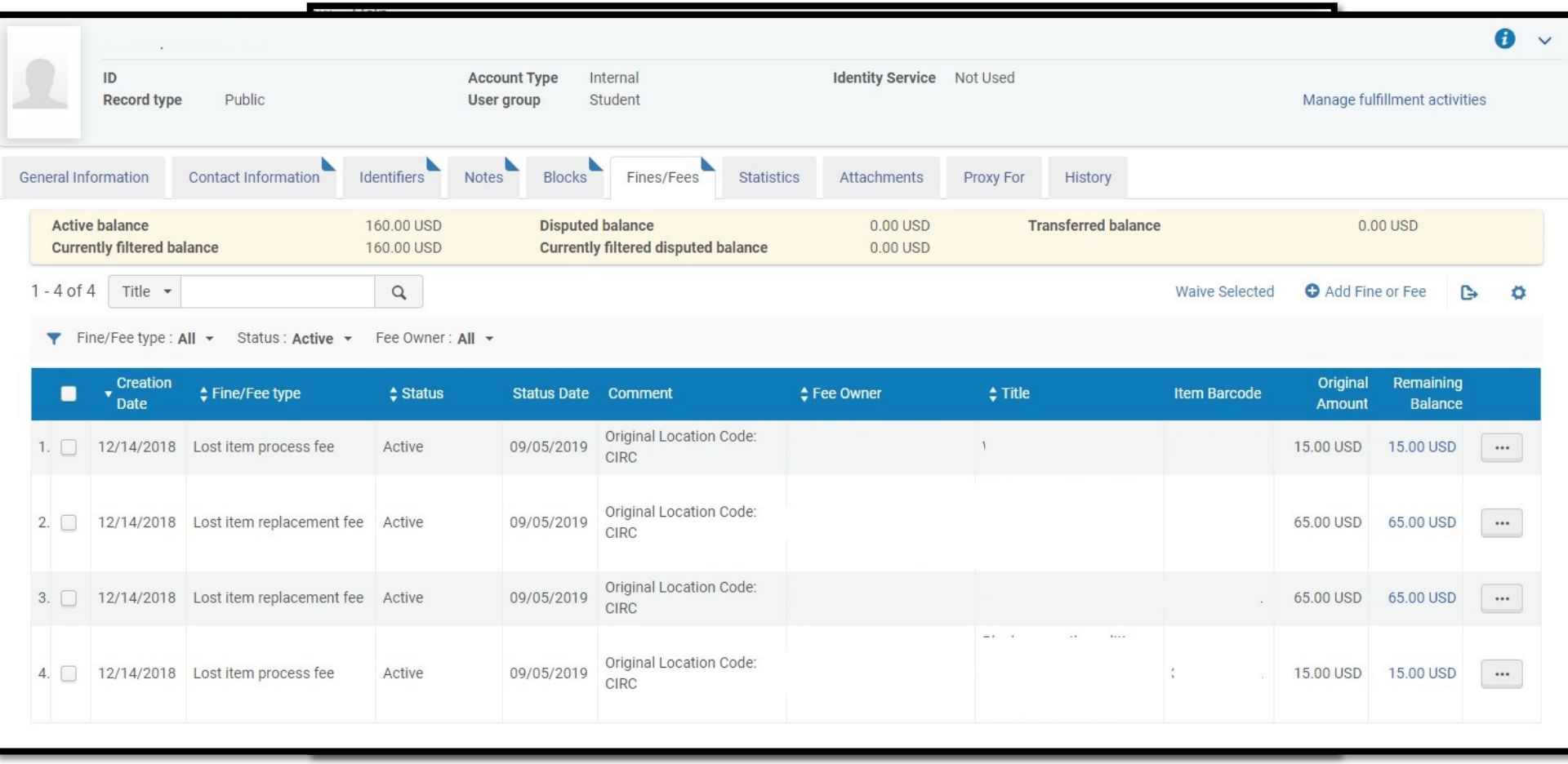
MMS ID	228873230005864	**Suppress from publishing**	No
Record Format	marc21_holding	**Suppress from external search**	No

LDR	00248cx a22000854 4500
001	427655
004	415100
005	20160428113117.0
008	1604284u 8 1001uu 0901128
852	0_ |b MIL |c bookstack |h BF448 |i .G53 2005 |i c.2 |t 2 |z Copy 2 is a gift from the estate of Dr. William Bodamer.

DATA REVIEW EXAMPLES: ELECTRONIC RESOURCE P2E



DATA REVIEW EXAMPLES: PATRON FINES & NOTES



ID
Record type Public
Account Type Internal
User group Student
Identity Service Not Used
Manage fulfillment activities

General Information | Contact Information | Identifiers | Notes | Blocks | Fines/Fees | Statistics | Attachments | Proxy For | History

Active balance	160.00 USD	Disputed balance	0.00 USD
Currently filtered balance	160.00 USD	Currently filtered disputed balance	0.00 USD

Transferred balance 0.00 USD

1 - 4 of 4 Title

Waive Selected | Add Fine or Fee

Fine/Fee type : All | Status : Active | Fee Owner : All

	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
1.	12/14/2018	Lost item process fee	Active	09/05/2019	Original Location Code: CIRC				15.00 USD	15.00 USD
2.	12/14/2018	Lost item replacement fee	Active	09/05/2019	Original Location Code: CIRC				65.00 USD	65.00 USD
3.	12/14/2018	Lost item replacement fee	Active	09/05/2019	Original Location Code: CIRC				65.00 USD	65.00 USD
4.	12/14/2018	Lost item process fee	Active	09/05/2019	Original Location Code: CIRC				15.00 USD	15.00 USD

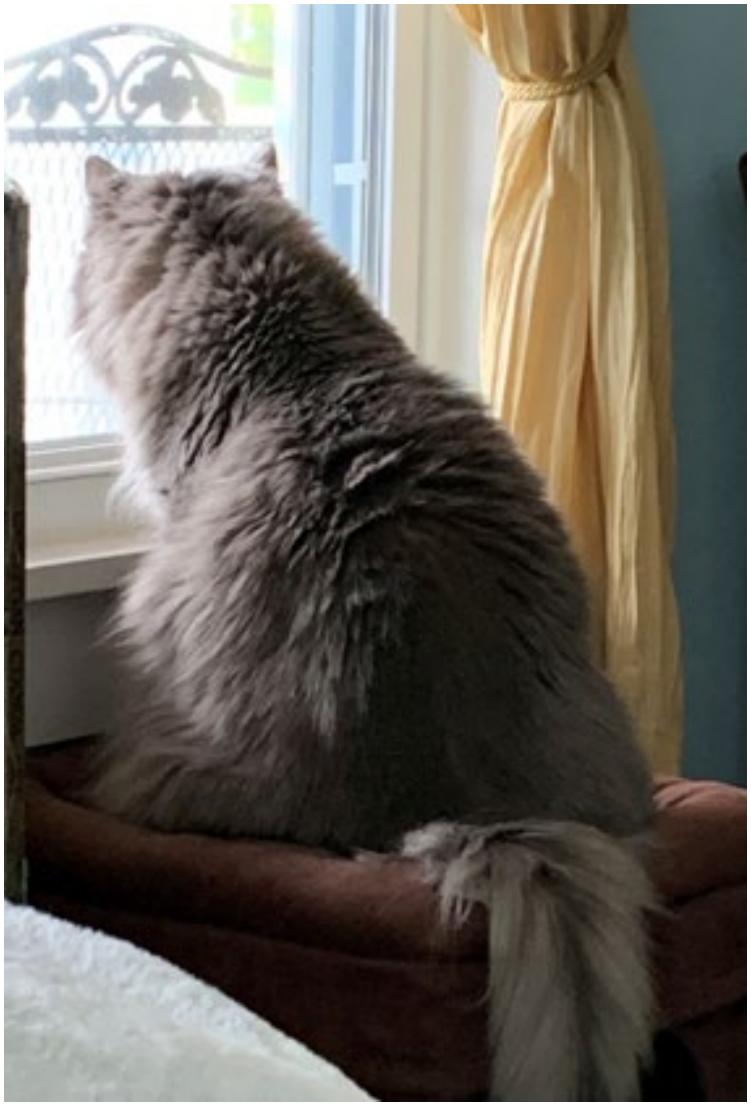
June 17-19: Bibliographic Data Review

Bib, MFHD, Item, Reserves, P2E, Link Resolver

June 22-23: Fulfillment Data Review

Circulation Data, Patrons, Fines/Fees

Questions?



Thank you!

Join us next Thursday at 2pm for another Office Hour

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