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

Open Office Hours 10/24/2019 Agenda

- Test Environments Delivered
  - Phase 1: Data Review, through 11/6
  - Reporting Problems
- Network Zone Refresher
- Upcoming Training - Live Webinars
  - Sandboxes available
- Your Questions

Test Environments Delivered

- Box Folder: XXX Test Load Delivery

- XXX Alma Test Load Delivery Letter.docx
  - One shared Alma login for staff for Phase 1 data review period from Oct.23 - Nov.6
  - Statistical reports from Voyager data extract, Link Resolver export(s), and Alma data migration

Data Review: A Refresher

- Are all data present?

- Are the data correct?

- Was my understanding of how the data were going to being processed correct?

Phase 1: Oct.23 - Nov.6

- Check test cases in your Data Migration Review worksheet
- Perform a general review
- Report problems to CARLI at support@carli.illinois.edu
- Leave data and configurations exactly as they have migrated

Phase 2: Nov.6 - early spring 2020

- Continue reviewing data
- Continue reporting problems to CARLI at support@carli.illinois.edu
- Begin making configuration changes
- Begin training on Alma functionality with your test data

Track any changes needed

Alma Data Migration Review Procedures

https://www.carli.illinois.edu/products-services/i-share/alma/prepare-datareview
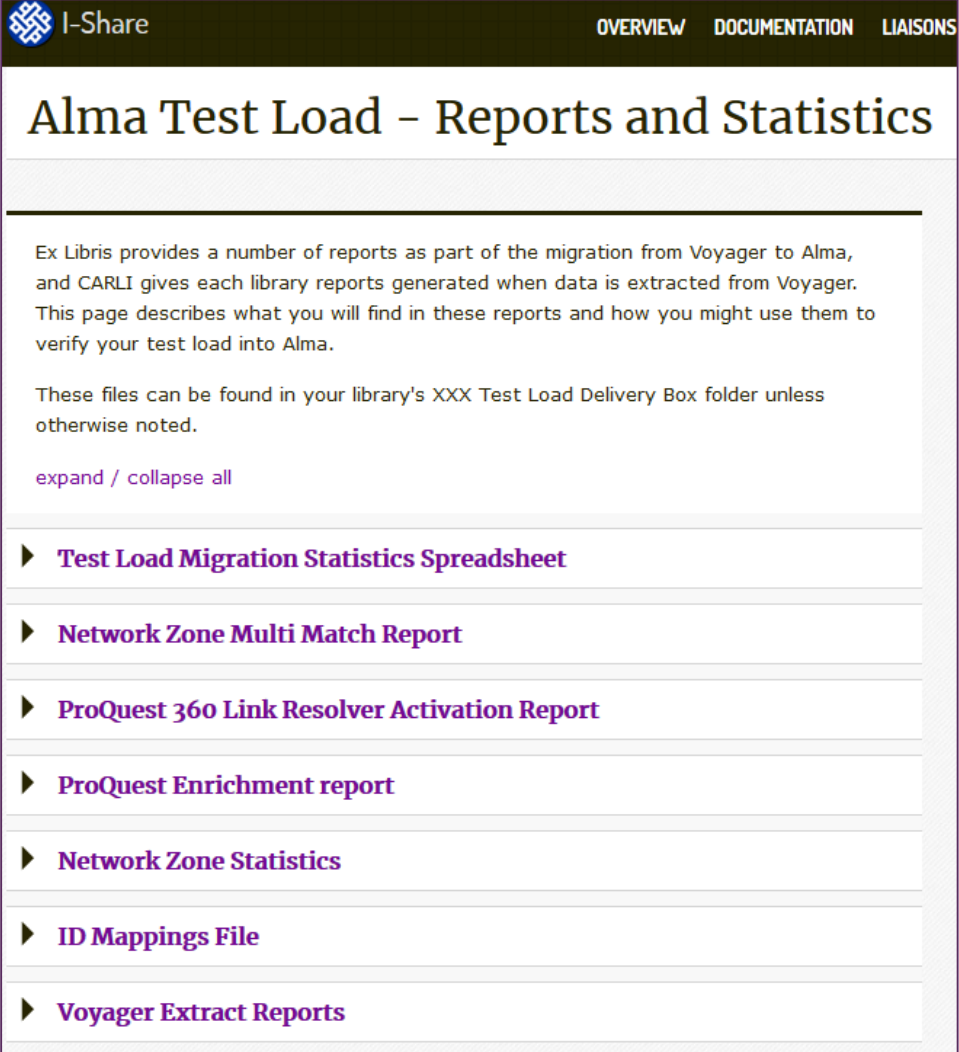
Helpful files and documentation

1. Final Migration Form in Box

2. Final Configuration Form in Box

3. Voyager to Alma Migration Guide

4. Your Data Migration Review worksheets with your examples

5. Ex Libris Testing Scripts

6. Test Load reports and statistics in Box

7. Alma Searches "click paths" web document

Alma Test Load - Reports and Statistics

- Files can be found in Box

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

Alma Data Migration Review – Alma Searches

- Tips for searching
- Click-paths in Alma

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

Reporting Problems, part 1

- The Alma/Primo VE Contact will collect problem reports from your library, and then communicate those problems to CARLI.

- Report these details to CARLI support. This will establish a CARLI Support ticket that allows all CARLI staff to monitor issues and identify if identical issues are present in other databases.

    - When reporting a problem to CARLI, please be as descriptive as possible. The Alma Data Migration Review Procedures website includes suggested data points to include.

    - Problems that look similar should not be assumed to have the same source issue, and should be reported separately.

    - Problems that have already been reported once by your library do not need to be reported again separately, however, library staff may follow-up to the original CARLI Support ticket with additional examples.

- CARLI will review reported problems and attempt to replicate what library staff found in Alma.

Reporting Problems, part 2

- After reviewing the problem, CARLI staff will report the problem to Ex Libris via their tracking system, SalesForce, with one case filed per problem reported.
    - The Alma/Primo VE Contact will be copied on each case and may review and respond to follow-up requests from CARLI or Ex Libris by email.
- Both CARLI staff and Ex Libris staff will likely be responding to several reports at the same time. You may not receive an immediate response about your report.

Network Zone (NZ) Refresher

NZ is a common repository for all members

- Network tab in your Alma Institution Zone (IZ) reveals bibs plus physical holdings and electronic inventory for each institution

NZ enables a shared catalog

- Maintain a single catalog of records for all members
- Single bib record synchronized with each institution
- Local, copy-specific data (e.g., 59X, 69X, 9XX and MARC Holdings) is maintained in the Institution Zone (IZ)

NZ was created from the contents of the Voyager Universal Catalog (i.e., UCdb)

- Initially linked IZ records to NZ records on OCLC number only
- After "go live" records will be linked on additional identifiers

Much more to come on the NZ in future!

Date/Time	Topic	Audience
Thurs, 14 Nov **10 - 11:30am CST**	Using Alma for Data Review: Inventory Model, Searching and Alma Analytics	Anyone who will be working in Alma
Tues, 19 Nov **10 - 11:30am CST**	Purchasing and Managing Physical Resources	Anyone in Technical Services
Thurs, 21 Nov **10 - 11:30am CST**	Purchasing and Managing Electronic Resources	Electronic Resources operators, anyone working in Technical Services
Tues, 3 Dec **10 - 11:30am CST**	Course Reserves	Circulation Desk managers and operators, Course Reserves managers and operators
Thurs, 5 Dec **10 - 11:30am CST**	Creating Sets and Running Jobs	Anyone who will be working in Alma
Tues, 10 Dec **10 - 11:30am CST**	Automated Fulfillment Network Configuration	General System Administrators, Fulfillment Administrators
Thurs, 12 Dec **10 - 11:30am CST**	Day-to-Day Patron Services within an Automated Fulfillment Network	Circulation Desk managers and operators

Please feel free to post your questions in chat or unmute yourself to ask them now!

We'll start by reviewing the questions already in chat.

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Thank you!

Join us next Thursday
at 2pm for another
Office Hour

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

Bon Voyager!

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