



*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](mailto: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](mailto: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>

The screenshot shows the CARLI website header with navigation links: NEWS, JOBS, EMAIL LISTS, MEMBER DIRECTORY, CONTACT. Below the header is a main navigation bar with links: PRODUCTS & SERVICES, MEMBERSHIP, EVENTS, GOVERNANCE, ABOUT, and a search box. A breadcrumb trail reads: PRODUCTS & SERVICES / I-SHARE / ALMA & PRIMO VE / ALMA DATA MIGRATION REVIEW PROCEDURES. The I-Share logo and navigation links (OVERVIEW, DOCUMENTATION, LIAISONS GUIDE, ANNUAL STATISTICS, SEARCH I-SHARE >>) are also visible. The main content area features the title "Alma Data Migration Review Procedures" and a paragraph: "This document provides an overview of the steps libraries should take to identify example records, review your Alma Test Load, and report any problems found in the migration of your data from Voyager to Alma." Below this is a section titled "Identifying Test Cases" with the text: "Your library's staff should identify sample records throughout your Voyager database that exemplify both good data and potentially problematic data. You will want simple and". On the right side, there is a "SYSTEM STATUS" section showing "All Systems Active: All Systems Active" with a green indicator. Below that is a section for "POPULAR DOCUMENTATION TOPICS".

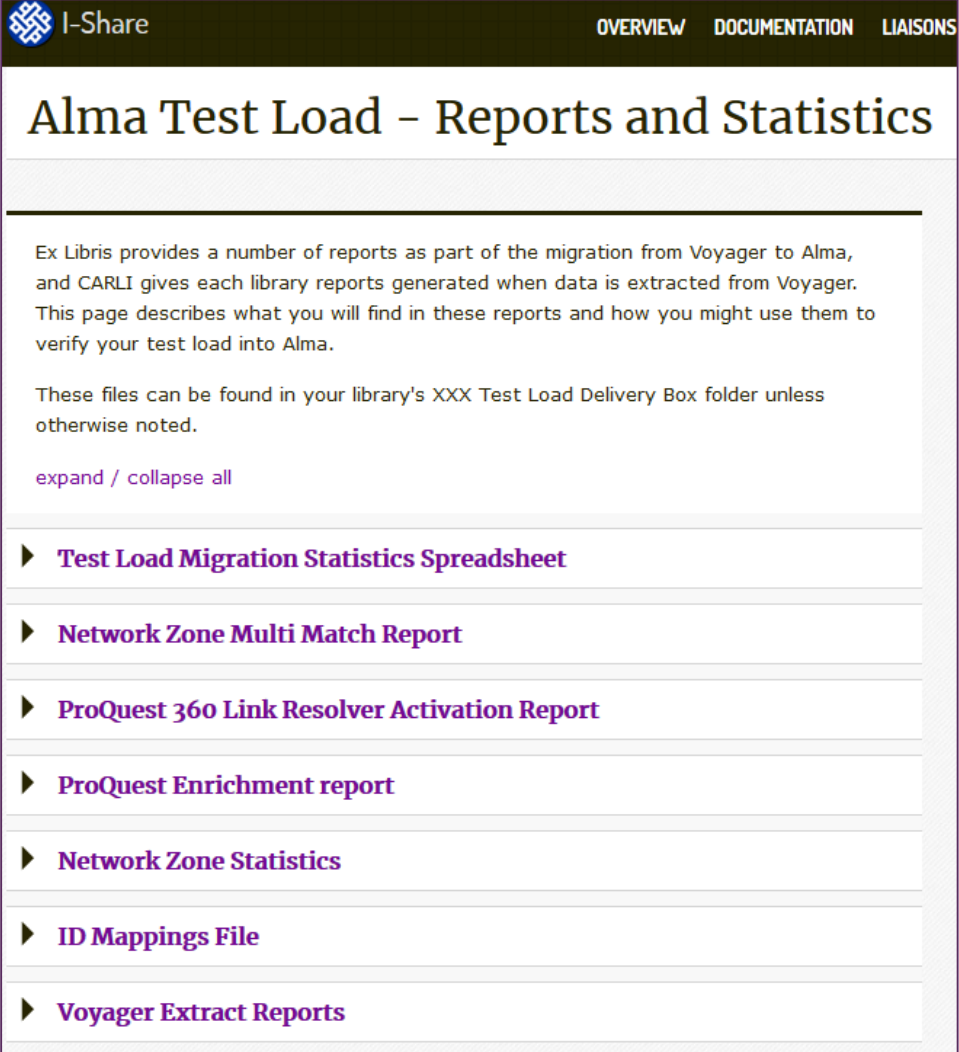
# Helpful files and documentation

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



The screenshot shows the I-Share website interface. At the top, there is a navigation bar with the I-Share logo and the text "I-Share" on the left, and "OVERVIEW DOCUMENTATION LIAISONS" on the right. Below the navigation bar is the main heading "Alma Test Load - Reports and Statistics". The main content area contains a paragraph explaining that Ex Libris provides reports as part of the migration from Voyager to Alma, and CARLI gives each library reports generated when data is extracted from Voyager. It also states that the page describes what to find in these reports and how to use them to verify the test load into Alma. Below this paragraph is a note that these files can be found in the library's XXX Test Load Delivery Box folder unless otherwise noted. There is a link "expand / collapse all" in purple. At the bottom, there is a list of report titles, each preceded by a right-pointing triangle icon:

- ▶ **Test Load Migration Statistics Spreadsheet**
- ▶ **Network Zone Multi Match Report**
- ▶ **ProQuest 360 Link Resolver Activation Report**
- ▶ **ProQuest Enrichment report**
- ▶ **Network Zone Statistics**
- ▶ **ID Mappings File**
- ▶ **Voyager Extract Reports**



# Alma Data Migration Review – Alma Searches

- Tips for searching
- Click-paths in Alma

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

**I-Share**

## Alma Data Migration Review- Alma Searches

During Open Office Hours on September 19 and September 26, both Ex Libris and CARLI staff demonstrated how to use Alma to help your library review your Voyager to Alma migrated data.

Please view the Open Office Hour recordings related to Data Review.

- [August 1, 2019: Introduction to Alma Data Review Procedures](#)
- [September 19, 2019: Data Review- Explanation of Phases and Preparation](#)
- [September 26, 2019: Alma search options for Voyager record examples \(full session from 9/26\)](#)
  - [Cataloging and Acquisitions Search Examples \(part 1 from 9/26\)](#)
  - [Fulfillment \(Patrons, Charge Transactions, and Reserves\) Search Examples \(part 2 from 9/26\)](#)

The click-paths illustrated in the 9/19 and 9/26 calls are recorded below, along with extra FAQ options. This page was updated 10/23/2019

### OVERALL REPORTS

Type of Data You're Trying to Find	Searching for What Kind of Record (i.e., blue search type button)	Search Path (index type, match type, criteria)
Count of Migrated Bibs	All titles	Basic Search: Keywords - Contains Keywords - * (Note: the number of bibs will include those from Voyager and the Link Resolver (if migrated) so will be larger than your count.) 
Count of Migrated Holdings	Physical Titles	Basic Search: Title: Keywords - Contains Keywords - * (Note: the number of physical holdings may be smaller than the number migrated because of the p2e conversion process.) 

# 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!

## UPCOMING TRAINING – LIVE WEBINARS

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

*Thank you!*

Join us next Thursday  
at 2pm for another  
Office Hour

Bon Voyager!



You can always contact CARLI at [support@carli.Illinois.edu](mailto:support@carli.Illinois.edu)