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

Hello everyone- This office hours is very exciting for us! Yesterday afternoon, each I-Share library received access to their Alma test environment!

In today's open office hours call we'll review your next steps in data review, briefly recap some details about the Alma Network Zone, and then have time for open Q&A. Since we're focusing primarily on Q&A we'll focus on our slides first and answer all questions at the end, unless it is an "at the moment" issue that won't wait.

Type your questions in the chat as you have them or later and we'll answer them at the end, then we'll invite folks to unmute after we've reviewed the chat 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

CARLI Alma Primo VE Contacts will now find new documents in your Box folder in a subfolder called "XXX Test Load Delivery," including some migration reports from Ex Libris and a file from CARLI called "XXX Alma Test Load Delivery Letter.docx" (where "XXX" is, of course, your institution's 3-letter I-Share library code). The delivery letter describes how to access your Alma test environment, so **please read the delivery letter document first**.

The delivery letter also includes links to our website documents about how to review your data and what is in the migration reports, and provides you some basic counts of the number of bib records migrated and how many of these matched records in the Network Zone. (We will talk more about the Network Zone numbers in the near future.)

CARLI Alma Primo VE Contacts should share the generic Alma credentials (Username: testAlma_XXX) and the statistics provided in the letter with all library staff who will be doing testing and data review in Alma. Do not share the Developer's Network credentials as these are specifically for the Alma Primo VE Contact to administer your institution's account.

If you are not able to connect to Box, send us a note to support@carli.illinois.edu.

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?

As we discussed in our open office hours on August 1st Data review is about verifying your data through checking the following: are all the data present?, are the data correct?, and were my choices about how I wanted my data migrated appropriate?
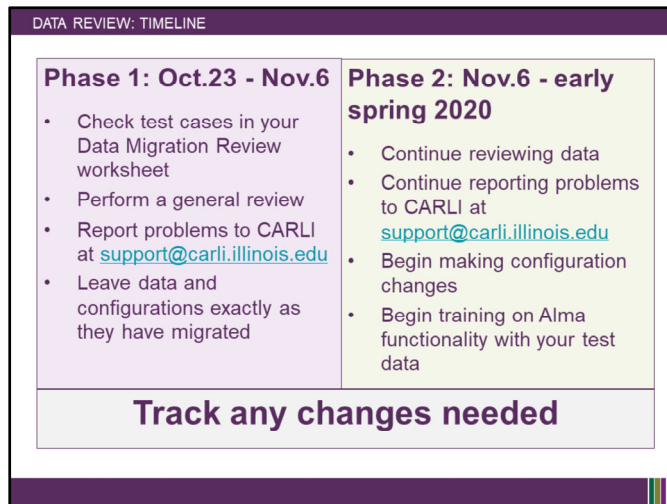
CARLI Office staff has done some preliminary checks, but you are responsible for reviewing and checking that your data migrated accurately. The process of Data review is important for library staff to prioritize; if we learn something migrated incorrectly during the test load, we can fix it for the production load. In summary, put in the time to do it. It is important, even if it is not glamorous. Ultimately, **you** are responsible for making sure **your data** migrated accurately.

When you are looking at your data in Alma you want to verify that the data you migrated is there: for example: for multiple copies: are both copies holdings present and displaying as expected; are your item notes present? Are your patron notes present? These are examples of the types of records we suggested you find examples of on your data migration worksheets.

Is information really missing because of an error in the migration, or is simply not displaying as expected because you're not familiar with where that information is in Alma, or is it missing because of a choice you made on the migration form?

Data review is not only about making sure the data is present, but that it is correct. My colleague Gordon Fellows put it this way "Testing is about making sure not only that the process did what you wanted, but that you wanted what it did" – each institution made a lot of choices on your migration survey, your location list, and your library list. All of those were combined to create your migration form, which informed how your data was migrated TO Alma. Did those choices pan out as you expected??

Remember because this is a test of the way your DATA have migrated, choices can be adjusted.

DATA REVIEW: TIMELINE

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

As previously mentioned, the Alma Test Load review will occur in two phases:

Phase 1:
- In Phase One from now through Nov. 6, all library staff who will access Alma to work on data review and testing will use a single username to log in to Alma.
- These credentials were provided to the Alma Primo VE Contact on October 23 via a letter in Box.
- You should begin reviewing the test cases that were identified in your Data Migration Review worksheets, and perform a general review of your data and settings using the resources we'll review on the next slide.
- Your institution's Alma/Primo contact should collect problem reports within your library and will be the contact person from your library who reports those to CARLI Support.
- During Phase 1, please leave any data and configuration settings exactly how they have migrated. If something looks wrong, CARLI and Ex Libris will need to be able to replicate the exact problem by looking at the examples you provided with data in the way that you have found it.

Phase 2:
- On November 6th, the CARLI Office will announce that Phase Two has begun and libraries can begin making data and/or configuration changes in your Alma test environment.
- At that time, CARLI will provide the Alma Primo VE Contact with personalized credentials to log into Alma and further instructions on how to set up other staff credentials in Alma.
  - Remember that any **data** changes are strictly experimental as all data will be reloaded at the production load.
  - Configuration settings will remain in place between the test load and final production load. So you can adjust these during the test load as you would like them to be for the production load.
- Libraries should continue to review data and report problems to CARLI throughout the entire Alma Test Load period, which will run from now until early Spring 2020.
- Primo VE environments will be made available the week of November 11 after indexing is complete.

Keep track of changes you would like to make
- As you are reviewing your test load, your institution's Alma/Primo VE contact should coordinate an internal process for keeping track of problems reported and any changes needed for your institution.
- Changes might include any modifications to make to your Migration Form settings, your P2E files, or link resolver worksheets before the production load next year.
- Also keep track of any data changes your institution would like to make either in Voyager before the final production load extracts, or changes you will wait and make post-migration in Alma.
- If you track any configuration changes during Phase 1 of testing, those changes can be applied as soon as Phase Two of testing is announced.

This slide is a reminder of our primary webpage for Data Review, where we've pulled together resources to help you with the data review process.

You can navigate to this page from the CARLI homepage > hover over Products and Services > select Alma & Primo VE. It's listed under the "Important Links and Resources" section.

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

On that Alma Data Migration Review Procedures webpage, we have a list of files and documentation that will be helpful for you to have available.
1.   Final Migration Form shared in Box
2.   Final Configuration Form Share in Box
3.   Voyager to Alma Migration Guide on Ex Libris website
4.   Your Data Migration Review worksheets with your examples shared in August
5.   Ex Libris Testing Scripts on Ex Libris website
6.   Test Load reports and statistics shared in Box
7.   Alma Searches click paths on CARLI website

Remember that you can and should let us know your questions throughout this process. We've already received some questions! We'll be able to use some questions to fill in our FAQ going forward.

On the next two slides, we'll highlight two newly-posted pages linked from this list in steps 6 and 7, that we haven't talked about yet in our other data-review-themed office hours.

Linked under step 6 on the previous slide, the Alma Test Load – Reports and Statistics page provides descriptions of the files you'll find in your library's Test Load Delivery Box Folder.

Linked under step 7 on the Alma Data Migration Review Procedures webpage the Alma Data Migration Review-Alma Searches page provides screenshots of "click-paths" and tips to help your library review your Voyager-to-Alma migrated data.

Many of these searches were demonstrated in the September 19th and 26th office hours. The recording of those sessions are available, but this page helps to condense that information.

As we hear any additional search-related FAQ, we'll add those search click-paths to this page as well.

The process of Data review is important for library staff to prioritize; if we learn something migrated incorrectly during the test load, we can fix it for the production load.

So what should you do if you find a problem? These steps are outlined on the Alma Data Migration Review Procedures webpage:

- 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.

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    - 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.

As a reminder, data review is ongoing throughout these phases, and we don't anticipate anyone will be completely finished with their data review after only 2 weeks. CARLI wanted to be sure everyone was focused on data review alone for a set amount of time. How you proceed locally after November 6 is entirely a local decision. Please be sure to continue to report any problems following the procedure outlined after November 6.

NETWORK ZONE

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!

There will be much more to come about the Network Zone in the future, but for today, just a few reminders.

The Network Zone is a common repository that enables a shared catalog where all institutions share a single record.

In the Network tab in your Alma, you'll be able to see holdings and inventory for other institutions without having to look in a public discovery interface.

Local data fields and holdings are kept and maintained in your Institution Zone.

The Network Zone was created using the contents of the existing Voyager Universal Catalog--the UCdb--which you may also remember is currently the source of the union catalog data in our VuFind 0.6 and Classic WebVoyage catalogs.

Each Alma Institution Zone was created from your migrated data, and then your records were linked to the Network Zone based on OCLC number. This limited ability for matching means that a number of your records were not linked due to either "multi-matches" on more than one OCLC number, or the lack of an OCLC to match on. We'll be analyzing the results of the test load linking process and looking for ways to improve the outcomes of linking to the Network Zone. And after we go live on Alma, records will be able to be linked to the NZ on additional identifiers.

Again, we are all learning about and adjusting to the different Alma "zones", so please stay tuned for more about the Network Zone.

UPCOMING TRAINING – LIVE WEBINARS		
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

All of our fall in-person Alma training sessions all have waitlists except for Joliet Junior College on Oct 31-November 1, so please do sign up for that one if you are interested in attending that session! More in-person trainings will be scheduled during Spring 2020.

In addition to the in-person trainings, we are very pleased to announce that registration is now open and available through THE CARLI CALENDAR for a series of 7 live webinars presented by Ex Libris staff. Each webinar will cover a different topic in depth and give you the opportunity to ask questions. If the dates and times do not work for you, don't worry, they will be recorded and links will be made available to watch later. We'll also send out the general registration link for these sessions to the Alma Primo Contacts list.

And a brief reminder for training purposes and learning Alma in general: while you now have access to your TEST Alma Environment (your library's data), you still have access to SANDBOX (GENERIC training database) environments. We will be re-sharing the information for the now 5 sandbox environments CARLI has available (and all their various logins) into each Library's Box folder in the coming weeks. You may find these sandboxes useful when preparing for applying different user roles.