



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

OPEN OFFICE HOURS
PRODUCTION MIGRATION FORMS

March 19, 2020

GOALS OF THIS PRESENTATION

- Introduce online survey that will be used to update your institution's Migration Form, due April 1.
- Answer your questions about the survey and Migration Form.



Migration Forms:

- Used by the extract program and Ex Libris to migrate your data from Voyager to Alma.
- Created by CARLI based on information your institution submitted on:
 - I-Share Alma Migration/Implementation Form
 - Location_List_XXX.xlsx
 - Alma_libraries_xxx.xlsx
- Shared via Box in October to help you evaluate your test migration results.
- Migration Forms are **different** than Configuration Forms.

CARLI Staff have again created an online survey to gather information, this time to update your migration form.

- Some institutions may have *no updates*. This is completely fine. Submit the online survey even if you have no changes.
- Some institutions may have already discussed changes with CARLI staff, or edited your existing Alma Test Migration Form XXX_Final.xlsm: submit this online survey with your changes.
- CARLI Staff will take responses to the online survey input by your Alma-Primo VE contact and use them for your production Migration Form.

If you know you cannot respond by April 1, 2020 please send a note to support@carli.illinois.edu *as soon as possible*.

MIGRATION FORM UPDATE DETAILS

- All questions but one, Question 17, have default answers, usually "No Change".
- No Change means "No change to the answer as found on the Test Migration Form".
- Details for each answer option are provided.
- By design not all questions on the Migration Form have a question on the online survey.
- Where applicable, CARLI recommendations are provided.
- Leaving as "No change" is ok and expected in most cases, except...



Changes that must be reported on this online survey:

- Locations that contain electronic resources for P2E
- New Location(s) and/or changes to location mappings
- New Alma Libraries
- New Vendors



OPTIONAL DATA TO RETAIN?

Two optional questions:

- Retain Course Reserves containers?
- Retain Acquisitions fund structure?

- CARLI expects that most libraries will NOT choose to retain these data. This is the default.

Updating the Migration Form survey webpage
I-Share Alma Migration Form Update Survey

This is an opportunity to make changes; no changes are required.

Submit the online survey by 5pm on April 1.

Contact CARLI with any questions at support@carli.illinois.edu

Thank you!

Join us next Thursday
at 2pm for another
Office Hour



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