Welcome!

Office Hours will start at 2pm and run until 3pm.

Please mute your microphone and turn off your camera.

During the Q&A session, 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

ALMA PRIMO VE PROJECT UPDATE:
REVIEW OF UPCOMING TASKS AND DEADLINES

April 9, 2020

QUICK SUMMARY OF VOYAGER/ALMA "FREEZE" DATES

WHEN	WHO	WHAT
✓ April 1	Library staff	Stop adding new libraries, locations, vendors to Alma test environments, migration forms revised
April 25	CARLI staff; library staff	Stop bib record bulk loads into Voyager; Libraries stop adding e-resource bibs to Voyager
May 1	Everyone	Voyager "Tech Freeze" begins: stop adding/updating/deleting all bibs, holdings, items to Voyager; stop updating acquisitions and serials data in Voyager. Voyager public catalog remains available, circ and UB continue, patron updates continue
May 1	Everyone	Alma Configuration Freeze begins: stop changing Alma configuration settings
May 8	SFX users	Stop updates to SFX
June 11	Library staff and patrons	Stop placing UB requests in Voyager; continue "local" circ in Voyager
June 19	Library staff	Stop circulation in Voyager; use **Alma** offline circ
June 24	Everyone	Live on Alma for all use!

Recordings of CARLI Alma & Primo VE Office Hours

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

March 5, 2020

Big Picture of Spring Calendar:

Migration deadlines, freeze dates, and expectations

Slides

April 1   ✓ Send changes to your Migration form to CARLI

April 1   ✓ Stop adding new locations and vendors to Voyager; any added to Voyager need to be in Alma

April 25   CARLI stops all bib record bulk loads in Voyager

April 25   Libraries stop loading new e-resource bibs in Voyager

April 30   Last day for work that stops during the "Tech Freeze"

May 1   Start of the "Tech Freeze"

May 1   New P2E files due back to CARLI

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- P2E will include all electronic resources in the e-resources locations that you indicated last fall
- ✓ With your Migration Form update submitted on April 1, you've indicated if you've added or changed any e-resource **locations** in Voyager since your first P2E report was created on July 23, 2019
- By April 27, 5pm: New P2E files will be provided to institutions via Box by 5pm on April 27
- By May 1, 5pm: P2E files must be returned to CARLI

- SFX customers:
    - May 8, 2020 - SFX freeze on CARLI Servers
    - May 11, 2020 - CARLI will extract data and provide to Ex Libris
- EBSCO link resolver customers:
    - April 16 - CARLI provides draft spreadsheets via Box
    - May 1 – Draft spreadsheets due back to CARLI
    - May 12 – Final spreadsheets due to CARLI
    - May 12 – EBSCO Link Resolver Freeze
- 360 customers:
    - May 4 – Libraries provide 360 Reports to CARLI
    - May 4 – 360 Link Resolver Freeze
    - May 11 – CARLI provides Final Reports to Ex Libris

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| April 22 | Last day to file any new work requests (WROs) for bibliographic bulk imports or deletes |
| April 25 | Last day that CARLI will run any new or ongoing bibliographic bulk import loads into Voyager |

May 1, 12:01am — Technical Freeze starts

Stop making any manual changes to inventory in Voyager (i.e., stop adding/deleting/editing bibs, MFHDs, items, POs, invoices, serials check-in, etc.)

New Info: Reserve lists and materials are included.

| June 15 | Last day for patron batch purges |
| June 17 | Last day to file any new Voyager patron load WROs |

June 19, 12:01am — Circ Freeze starts

Stop making any manual changes to patron records and circ status (adding/deleting/editing records, fines/fees, circ status)

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May 1 is the deadline to complete Alma configuration changes before go-live.

This includes:

- **Alma and Primo VE Configuration**
- **Authentication setup**
  - OpenAthens or an institution's system set up and tested for authenticating users for Alma and Primo VE
- **SIS configuration setup**
  - Student Information System synchronization (patron/user updates) set up and tested
- **Other third-party integrations**
  - E.g., Self check stations (if accessible during closures)

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Now – Be testing and evaluating your institution's Primo VE discovery interface!

Now through May 1 – Make any configuration changes to Primo VE.

- Many Primo VE resources on the CARLI website and Ex Libris Knowledge Center.

- Institutions with Alma- and/or Primo VE-certified staff should make changes directly in Alma.

- Institutions without certified staff received information from CARLI for how to submit changes.

Universal Borrowing and ILDS delivery were shut off on March 16 due to COVID closures. No date for restart yet.

June 11	Stop placing UB requests, "request" buttons disabled in VuFind, requests in process get to their destinations; this will include loans to I-Share libraries and ILLINET libraries through Voyager UB
June 19	Stop local circ in Voyager
June 19-24	I-Share libraries MAY opt to use Alma offline circ

These deadlines will only apply to some I-Share institutions:

March 25 ✓ Libraries must notify CARLI if they are concerned about the Network Zone Special Collection workflow not meeting their needs.

April 22 If you use Voyager Acquisitions: Last date to request rollover/fiscal period close in Voyager via WRO.

April 24 If you use Voyager Acquisitions: All rollovers in Voyager must be performed on or before April 24.

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- Ideas for Activities During the Technical Freeze
  https://www.carli.illinois.edu/products-services/i-share/alma/technical-freeze-ideas
  - Recommended Online Alma Trainings for Acquisitions and Cataloging
  - I-Share Network Zone Cataloging Recommendations
  - Post-Migration Workflow to Restore Special Collection Bibliographic Records
  - *New:* Importing Bibliographic Records from WorldCat to Alma using
    - OCLC Connexion Gateway Exports
    - Alma's Search Resources in the MD Editor
    - *Coming soon:* OCLC Connexion Local Files

Remember you can continue to:

- Complete Alma/Primo VE Certification

- Learn more about Alma through online documentation and videos

- Use your own Alma instance for testing and training until May 22

- After May 22, you an continue to use our generic Alma sandboxes for training and testing:

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

- Ask each other questions using the CARLI Interest Group email lists: https://www.carli.illinois.edu/email-lists

Getting Ready for Primo VE program, 4/2/2020

- Recordings posted:
  https://www.carli.illinois.edu/products-services/pub-serv/Getting_Ready_for_Primo_VE

- Thanks to all who presented and attended!

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Reminder: AFN Testing Workflows

- How To: Testing the Automated Fulfillment Network (AFN)
  https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN

Optional AFN Testing sessions:

- Friday, April 10, 2020 - 12:00pm to 1:30pm

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New CARLI Documentation on Alma Letters

- Alma: Letters
  https://www.carli.illinois.edu/products-services/i-share/alma/config/letters

- Alma: Overdue and Lost Loan Rules, with associated configuration settings
  https://www.carli.illinois.edu/products-services/i-share/alma/config/lostoverdue
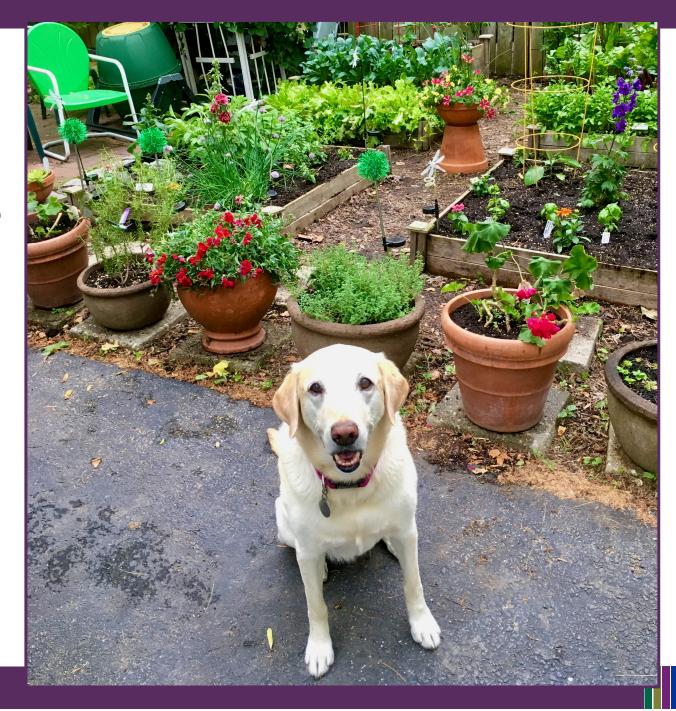
Optional Sessions on Overdue and Lost Loans in Alma

- Tuesday, April 14, 2020 - 10:00am to 11:00am

- Wednesday, April 15, 2020 - 2:00pm to 3:00pm

- Friday, April 17, 2020 - 9:00am to 10:00am

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Questions?

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Thank you!

Join us next Thursday
at 2pm for another
Office Hour

Bon Voyager!

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

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