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

VOYAGER FROZEN: LET IT GO!

Office Hours 4/30/2020

Agenda

- Reminders
- What are CARLI Staff doing now?
    - Data Extracts
    - Patron Clean up in Voyager
- What can you be doing now?
    - Circ Continues in Voyager
    - Tech Freeze Ideas
- The "Go Live Readiness Check List"

Upcoming Deadlines and Deliverables

- **Tonight (Thursday, 4/30) at 11:59:59pm**
  - Technical Freeze Begins
    - Stop making any manual changes to inventory in Voyager.
    - Stop setting "OK to export" to send holdings to OCLC WorldCat.
  - Alma Configuration Freeze Begins
    - Stop logging into Alma's Configuration Settings

- May 1, by 5pm: Updated P2E file due back to CARLI

Link Resolver Deadlines

- **SFX**:

  - Updates to your instance need to be completed before May 8.

- **EBSCO**/**OCLC**:

  - May 1: Draft file due

  - May 11: Final file due

- **360**:

  - May 4: Draft reports due

  - May 8: Final reports due

https://www.carli.illinois.edu/products-services/link-resolver-sfx/alma_migration

CARLI Staff Work during Technical Freeze: Data Extracts

- What are those extracts?
    - Institution catalogs: Bibs, Holdings, Items, Serials Issues
    - Institution acq: Ledgers, funds, order lines, invoices
    - Institution circ: Reserves, Patrons*, Transactions*
        - Patrons and transactions extracted twice
    - CARLI union catalog for the Alma Network Zone
- Watch our Production Extracts page for dates
    - https://www.carli.illinois.edu/products-services/i-share/alma/prod_migration_extracts

CARLI Staff Work during Technical Freeze: Voyager patron record clean-up

- In February, I-Share Liaisons filled out survey for patron record clean-up in preparation for the migration.
  - https://www.carli.illinois.edu/products-services/i-share/circ/secure/datacleanup-finesfeespatrons
- Work will begin in May and continue through mid-June.

Circulation Continues in Voyager

- Continue to use Voyager for Circulation activities until Friday, June 19.

- Last day to file a WRO for a patron load in Voyager is Wednesday, June 17.

- Last day to fine a WRO for a patron purge from Voyager is Monday, June 15.

Tech Freeze: Keeping Busy

- Your Alma & Primo VE instance will be available until May 22
  - Continue to test and develop workflows; practice routine workflows
  - No more Configuration
- Generic Sandboxes available
- Other ideas from Technical Services Committee (some may work more than others with restrictions in building access due to COVID-19): https://www.carli.illinois.edu/products-services/i-share/alma/technical-freeze-ideas
  - Revise internal training and documentation
  - Review online trainings

- Ex Libris uses a standard checklist form to help assess progress on a library's preparation for going live on Alma.

- This is not a test. It is not like Alma certification.

- CARLI staff have edited the form to remove tasks that don't apply to our project.

- Not all tasks on the list will apply to every library.

- Use this to measure your progress and see any gaps.

- Ex Libris would like us to return these by early July.

- CARLI and Ex Libris will use your responses (and your support tickets) to identify areas where you need assistance.

- Find it at: Go Live Readiness Checklist (PDF) and Go Live Readiness Checklist Word document

Questions?

Thank you!

Join us next Thursday
at 2pm for another
Office Hour

Bon Voyager!

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