3/15/2019 Library Services Project Update

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LSP Implementation Project Director

SUNY Libraries Shared Services

- Met with SLC Board this week to discuss SLC and SUNY Libraries Shared Services.
- Identifying and clarifying the role and relationship that SUNY Libraries Shared Services staff will have with SLC working groups, task forces, and board.
- SLC will be taking more managerial responsibility of working groups and task forces, but oversight and management of the SUNY Libraries Shared Services will be administered at SUNY System through OLIS.
- SUNY Libraries Shared Services staff will be hosted on a SUNY campus, with Shannon Pritting serving as director.
- SUNY Libraries Shared Services staff hiring being finalized now.

Banner-Alma Integration Update

- Agreement with SICAS is that Alpha test needs to work at Oneonta before release. Alpha test after fixes will happen today or next week, after which we'll begin release.
- Will release SICAS application to 5 beta testing campuses in next couple of weeks. Time to develop documentation and refine Alma based processes.
- Estimated timeframe is to begin working with campuses on Banner-Alma integration in early April.
- This will be our top project management priority when we have the application delivered.
- Reminder: If you have not yet implemented authentication in Alma/Primo, then we will wait for you to set up authentication before we schedule your campus for Banner-Alma integration.

Link Resolver Forms

- Project Management team completed link resolver forms based on:
  - Fresh pull of your Ebsco data as of ~2/1/2019
  - Your input on the e-resources consultation.
- Link Resolver Forms and Portfolio Loader Files Delivered to Institutional Leads on 3/8:
  - https://public.3.basecamp.com/p/yyf9ZX59tjiq68UrKfmMjk1c
- Presentation by SUNY about LR forms 3/18 at 10:00.
- Any further adjustments, clean up, or modifications are responsibility of campus.
- Final forms are due in your Migration Salesforce case by May 10th.
- If campuses do not submit a Link Resolver form in Salesforce by 5/10, we'll submit the form that was shared on 3/8 as is.

P2E

- Reminder that all Aleph content that is not deleted will be migrated.
- OLIS reaching out now to campuses who may need to revise their P2E strategies.
  - Campuses will need to determine if they're going to delete or create a P2E of electronic content, or acknowledge that the content will come over as physical/print.
- 1 April: shared server campuses notified to determine what will be in their final P2Es.
- 19 April: shared server campuses all campuses must indicate what will be in P2E or submit their P2E.
- 26 April: All shared server campus P2Es verified.
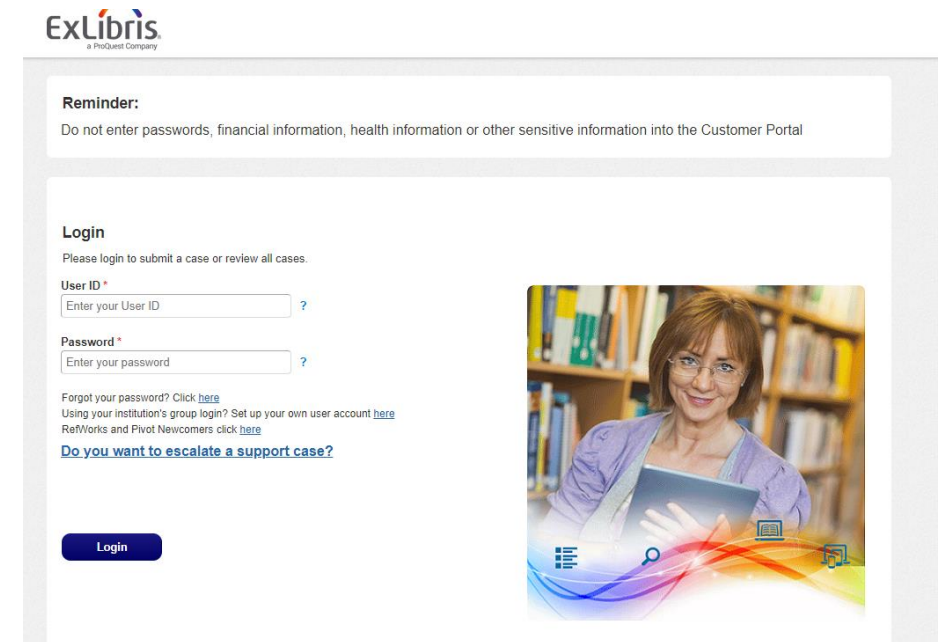
Tying up the Guided Path

- What SUNY Project Mgrs. Said they would do:
  - Complete Aleph to Alma Migration form, config. form, and link resolver form
  - Limited data cleanup such as STA deletes—which has already been completed.
  - Review your current ERM environment and suggest path forward.
- **Guided path work now completed**
- We will make no changes to the Aleph to Alma migration form unless you request a change. And, you must be specific—tell us exactly what needs to change in the form.
- We're going to help guide everyone through the cutover and collaborate with ExLibris to make sure all the required information is submitted.

Cutover Planning

- ExLibris is in the process of creating Salesforce cases for your cutover migration. So, far 18 have been created.
- These will be where you communicate any special circumstances or issues that you would like ExLibris to know about related to cutover migration.
    - But, if it's not related to cutover migration, please open a separate Salesforce case.
- All campuses have Salesforce accounts, and please test your access now to make sure you can interact with ExLibris via Salesforce.
    - Add any people not in Basecamp that need to contribute to case as additional emails.

Potential Things to Note in Salesforce Cutover Case

- If you want to keep funds in Alma (note that you cannot retain funds in Alma if you are migrating funds from Aleph).

- Any special circumstance such as a large deletion of records that would create a large disparity with estimated record numbers.

- Specific questions on migration forms.

- Data review issues.

- Link to ExL Salesforce:
  - https://exlidp.exlibrisgroup.com

Cutover/Go-Live Groupings Details Finalized

- Will be updating migration guide with full details:
  - https://slcny.libguides.com/migration
- Cutover final schedule will also be added to/updated in Basecamp ExL schedule by this weekend.
  - Note: dates already on BC will be updated slightly
- Campuses should have day-by-day schedule for cutover planning now.

SUNY Libraries Consortium / SLC Guides / Training / Migration Forms and Cutover Planning / Key Dates

Migration Forms and Cutover Planning

Search this Guide [Search]

Key Dates
Aleph to Alma Migration Form
E-Resource Migration
Configuration Form
Primo Forms
3rd Party Integration Form

Overview

Migration Process - The process of transforming source data to Alma format

Test load:
- Timeframe: October 2018
- All data from all sources is loaded into your Alma environment
- Initial configuration loaded and adjusted throughout implementation
- Purpose:
  - #1 – Test how the data technically migrates and adjust if necessary
  - #2 – Test your workflows in Alma with your data

Cutover load:
- Timeframe: June 2019
- All data from all sources is loaded again at cutover
- Configuration retained

Fall Test Load

For the most up-to date list of deadlines and due dates, refer to the To Do list in the Ex Libris Basecamp. Note: to view this list, you must have been granted access by Ashley DeHaye through your institutional lead.

Migration Form - August 17

P2E File - August 17

Cutover Dates: April

- ~17 April: Aleph to Alma migration forms generated and distributed to SS campuses. Our approach will be to use the previous form as input.
- 19 April: SS campuses finalize P2E and submit requests through Footprints.
- 26 April: P2E files verified on servers.
- 26 April: Aleph to Alma migration form changes finalized, begin verification on servers.
- 26 April: Deadline for campuses to end updates to Aleph that will affect Aleph to Alma migration form. Recommendation is that campuses end this work on 16 April, if possible.
- 26 April: COB deadline for requests to OLIS for data cleanup. There will be no further cleanup requests after this date.

Cutover Dates: May

- 10 May: SS all data cleanup activities completed (whether campus managed or OLIS managed).

- 10 May: all forms (LRAA and Aleph to Alma) or 360 link data submitted.

- 17 May: OCLC Master Record query submitted. OCLC cataloging can continue at campuses, but added/deleted records will not be included in initial NZ load.

- 24 May: Alma freeze for all institutions.

Group 1 Dates

- 24-May Group 1 - Last weekly update for EDS/Summon
- 27-May Group 1 – Aleph Tech Services Freeze begins COB
- 28-May Group 1 – Local field move job (manage 37) runs
- 29-May Group 1 - Circ Freeze begins COB / OPAC Circ Functions Disabled
- 30-May Group 1 - Data Extracts Begin.
- June 10—Alma environments delivered. Data Review begins with acceptance before go-live.
- June 13—Go Live

Group 2 Dates

- 31-May Group 2 - Last weekly update for EDS/Summon
- 3-Jun Group 2 - Tech Services Freeze begins COB
- 4-Jun Group 2 - Local field move job (manage 37) runs
- 5-Jun Group 2 - Circ Freeze begins COB / OPAC Circ Functions Disabled
- 6-Jun Group 2 - Data Extracts Begin (Ex Libris)
- 16-June: Alma environments delivered. Data Review begins with acceptance before go-live.
- 19- June: Go Live

Group 3 Dates

- 7-Jun Group 3 - Last weekly update for EDS/Summon
- 10-Jun Group 3 - Tech Services Freeze begins COB
- 11-Jun Group 2 - Local field move job (manage 37) runs
- 12-Jun Group 2 - Circ Freeze begins COB / OPAC Circ Functions Disabled
- 13-Jun Group 2 - Data Extracts Begin (Ex Libris)
- 23-June: Alma environments delivered. Data Review begins with acceptance before go-live.
- 26- June: Go Live

Group 4 Dates

- 14-Jun Group 3 - Last weekly update for EDS/Summon
- 17-Jun Group 3 - Tech Services Freeze begins COB
- 18-Jun Group 2 - Local field move job (manage 37) runs
- 19-Jun Group 2 - Circ Freeze begins COB / OPAC Circ Functions Disabled
- 20-Jun Group 2 - Data Extracts Begin (Ex Libris)
- 30-June: Alma environments delivered. Data Review begins with acceptance before go-live.
- 3 -July: Go Live

What will affect the Aleph to Alma Migration Form

- No updates (additions/deletions) to Aleph tables for SS should not occur past April 26th:
  - Collection Codes (tab40),
  - Patron statuses (tab31),
  - Item statuses (tab15),
  - material types (tab25);
- Updates to the following tables can continue until appropriate Aleph freeze dates:
  - Circulation related functions in tab16, tab17 and tab32.

Upcoming Training

- Scheduled
  - 3/15: FY Rollover Process
  - 3/18: Link Resolver Form Review (SUNY)
  - 3/19: Plattsburgh in-person training
  - 3/20: Authorities
  - 3/22: Overdue and Lost Loan Profiles
  - 3/29: What to Look at on Link Resolver Forms
  - 5/10: IDS Project Virtual User Group (will cover fulfillment and RS topics)
  - 5/21, 5/22, 5/23: IDS in-person RUGs (2 person per campus cap)
  - Fulfillment and Resource Sharing Course to start in mid-late April details released soon.
  - We're looking at what to schedule for Wed-Friday sessions, so please send us a libanswers request for any additional training.

- We're reviewing and adding more topics as needed, and as comes up in sessions.

- Send session requests to: info@slcny.libanswers.com

- Note that some of these are "Alma-Primo VE Weekly Meetings" on the Project Schedule.

Two New Courses Released

- Electronic Resources Management: begins March 21st
- Resource Management (Cataloging Focused): begins late April

- Registration Required for each course, with total caps of 60, and then per-campus limits.
- Rationale for caps is that one person is leading the course, and keeping up with questions and interactions is time consuming, in addition to preparing presentations.
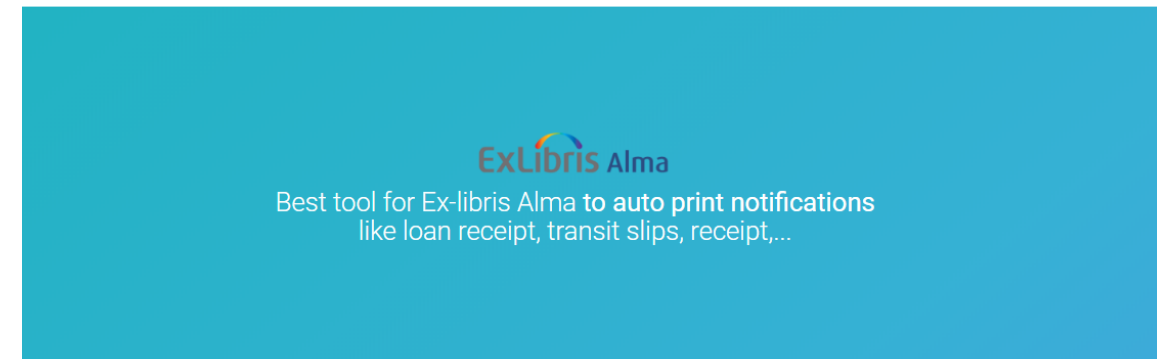
I'm working on local training, what's available?

- Libanswers has 215 FAQs, some of which have step-by-step documentation:
  - http://slcny.libanswers.com/
- Main Training Page has links to variety of other training material:
  - https://slcny.libguides.com/training
  - Training materials are broken down into functional area or other grouping such as health checklist or Getting Started in Acq. Course.
  - Course materials being added to the training materials as the courses are going on.

Reminder as We Move into Cutover

- Please communicate with SUNY at:
  - Libanswers: info@slcny.libanswers.com

- OLIS:
  - Footprints

- ExLibris:
  - Most questions and default to request: Basecamp
  - Specific issue or direct question: suny-alma-primo@exlibrisgroup.com
  - Salesforce will also be used for communicating about cutover migration

- Emailing individuals (from a SUNY perspective) will lead to a much slower response as we will prioritize these channels.

Automatic Email Manager

- Finalizing procurement now.
- Won't be offering annual option: one-time purchase only via SUNY.
- Will add to Alma/Primo charges in recharge.
- Will be reaching out to interested campuses in the next few days to begin finalizing everything.
- 30-day trial has full functionality if you want to get started on configuration now.
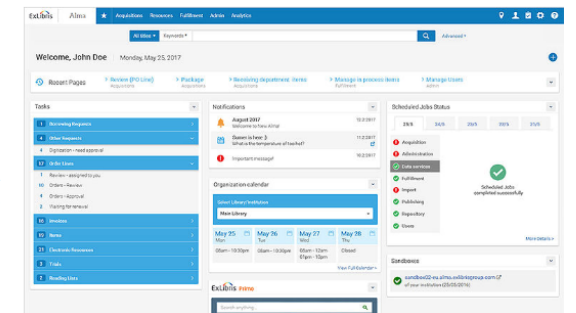
Questions