Alma & Primo VE Kickoff

**University of California Libraries (01UCS) –
Full Implementation Phase**
Date: 5 November 2020
Marci Deignan: EXL Project Manager

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Today's Kickoff Meeting will cover:

- Project and Timeline Overview
    - EXL Project Manager (~45 mins)
- Test Load Migration Scope and Test Load Timeline Overview
    - EXL Migration Consultant (~45 mins)
- Q&A
    - UCS and EXL Team (~30 mins)

Project and Timeline Overview - Agenda

- Welcome

- Project Milestones & Timeline

- Project Communication & Documentation

- Common Topics

- Next Steps

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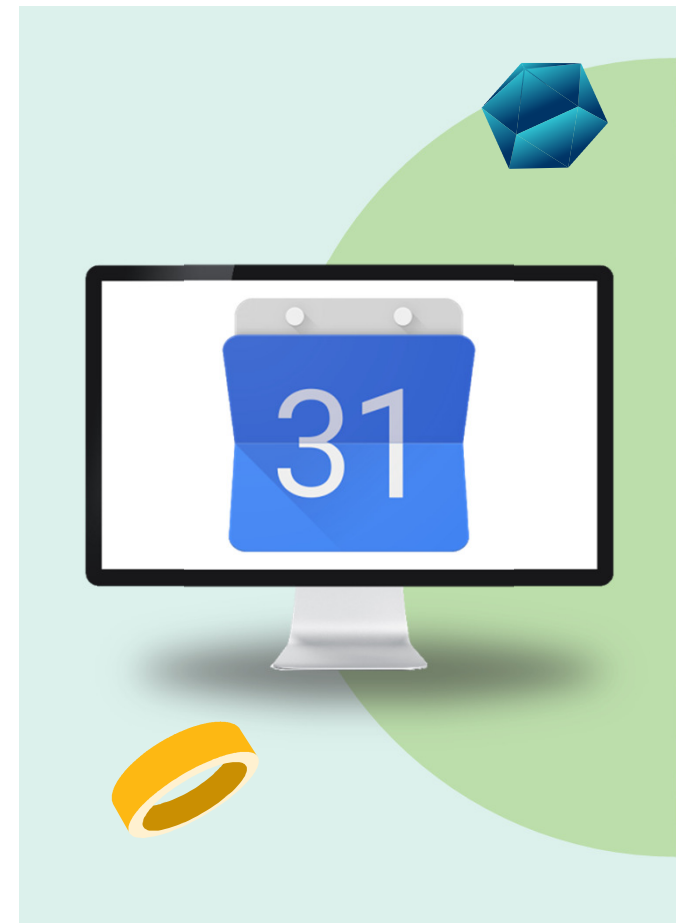
WELCOME

Welcome back to our Vanguard participants:
- UC-Berkeley
- UC-Los Angeles
- UC-San Diego
- UC-San Francisco
- UC-Santa Barbara
- CA Digital Library

Greetings to our new project members:
- UC-Davis and Davis Law
- UC-Irvine
- UC-Merced
- UC-Riverside
- UC-Santa Cruz

Meet the Ex Libris Core Team

Marci Deignan - Project Manager

- Project Timeline & Scope
- Reporting and Communications
- Issue Tracking
- Prioritizations and Escalations

Le Tran – Sr. Implementation Consultant

- Product Configuration
- Technical Training
- Workflows Analysis
- Troubleshooting, Support

Svetlana Smirnov – Sr. Implementation Consultant

- Product Configuration
- Technical Training
- Workflows Analysis
- Troubleshooting, Support

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Meet the Ex Libris Core Team

Laurie Welling – Sr. Implementation Consultant

- Migration

Ping Gao – Implementation Consultant

- Product Configuration
- Technical Training
- Workflows Analysis
- Troubleshooting, Support

Marina Spivakov – Director Implementation Services

- Project Sponsor
- Technical Issues
- Escalation Path

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Our Extended Ex Libris Team

NA Professional Services Management:

- **Adriana Pilecky-Dekajlo**
  - Director of Project Management

- **Leah Bokar**
  - Implementation Manager, Migration

- **Dolph Chaney**
  - Implementation Manager, Consultants

- **Amanda Robertson**
  - Implementation Manager, Consultants

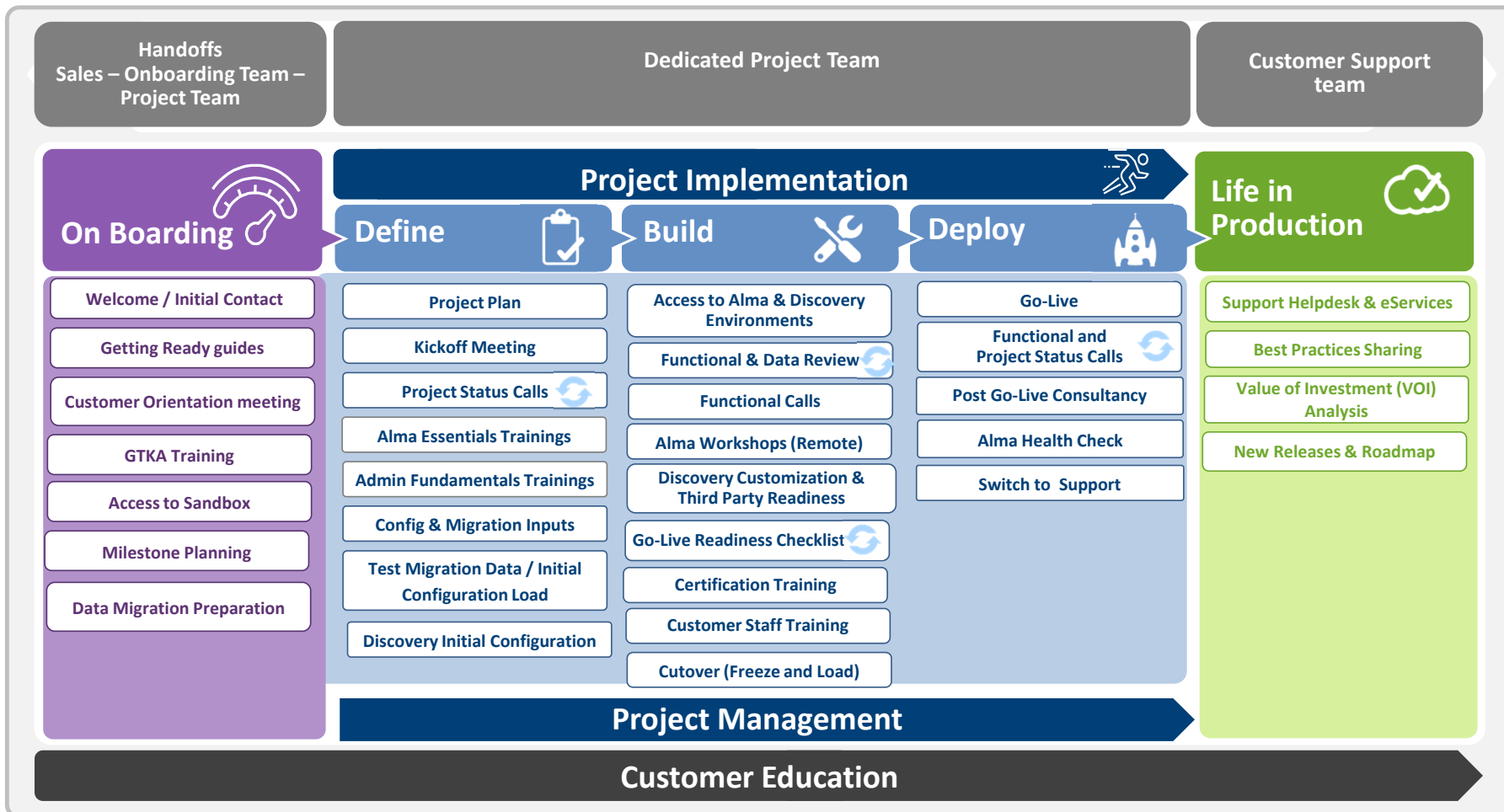- **Melissa Hilbert**
  - Regional Professional Services VP

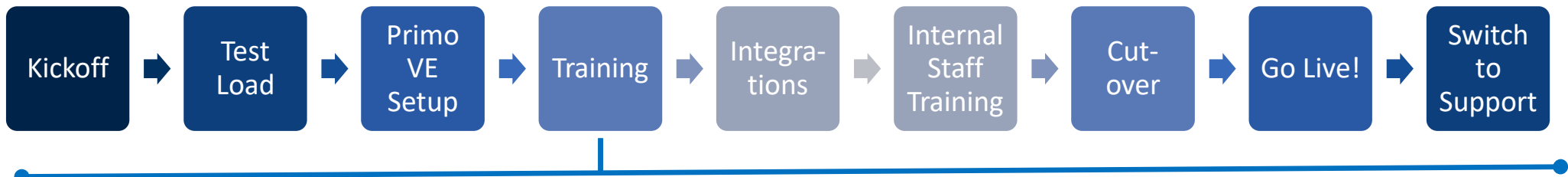**Authentication**

- **Wei Dai**
  - Technical Support Manager

Project Milestones & Timeline

Project Overview

Handoffs Sales – Onboarding Team – Project Team	Dedicated Project Team	Customer Support team

Project Implementation

On Boarding	Define	Build	Deploy	Life in Production
Welcome / Initial Contact	Project Plan	Access to Alma & Discovery Environments	Go-Live	Support Helpdesk & eServices
Getting Ready guides	Kickoff Meeting	Functional & Data Review	Functional and Project Status Calls	Best Practices Sharing
Customer Orientation meeting	Project Status Calls	Functional Calls	Post Go-Live Consultancy	Value of Investment (VOI) Analysis
GTKA Training	Alma Essentials Trainings	Alma Workshops (Remote)	Alma Health Check	New Releases & Roadmap
Access to Sandbox	Admin Fundamentals Trainings	Discovery Customization & Third Party Readiness	Switch to Support	
Milestone Planning	Config & Migration Inputs	Go-Live Readiness Checklist		
Data Migration Preparation	Test Migration Data / Initial Configuration Load	Certification Training		
	Discovery Initial Configuration	Customer Staff Training		
		Cutover (Freeze and Load)		

Project Management

Customer Education

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High-Level Project Milestones

Kickoff → Test Load → Primo VE Setup → Training → Integra-tions → Internal Staff Training → Cut-over → Go Live! → Switch to Support

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Project Schedule At-a-Glance

	Nov	Dec	Jan	Feb	March	April	May	June	July
Kickoff	5 Nov 2020								
Alma Core Trainings *(Alma Essentials and Admin Fundamentals)*	2 Nov 2020* – 8 Feb 2021								
Test Load Data and Forms Preparation (*Nov/Dec*) **and Initial Configurations** (*Jan/Feb*)	5 Nov 2020 – 5 Feb 2021								
Test Load Data Delivery (Alma)				~19 Feb 2021					
Data Testing, Configuration Adjustments, Discovery Customizations, Integrations, Workflows, Internal Staff Training, Day 1 Preparations (**Some tasks will end prior to June 30*)				~19 Feb – 30 June* 2021					
Cutover Work *(including planning)*							~1 May – 26 July 2021		
Go Live!									27 July 2021

Project Communication and Documentation

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Project Meetings – Weekly Calls

- **Weekly Project Update Meetings**
  - Mondays: 1-2pm PT
  - May run up to 1 hour
  - Agenda: Project updates from the EXL PM, functional Q&A sessions based on trainings, and more
- **Reserved Time for Weekly Office Hours or Special Meetings**
  - Thursdays: 10am-12pm PT
  - May run up to 2 hours
  - Examples of a "special meeting" would include this Kickoff meeting and the post-Test Load "Using Alma for Data Review" session
- **PM to PM Meetings**
- **Additional project meetings will be scheduled as needed**

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Communication – Basecamp

Why are we using Basecamp?

For:

- Project-related topics and resources

- Posts and discussions on specific topics

- Assignments and/or deliverables

- Project plans, scheduling

- Meeting minutes/summaries

- Presentations, spreadsheets, and other project related documents

- Asking product-related questions

  - How does *x* work

  - Where to find documentation about *y*

  - This *z* function is not doing what I expect

- Reporting initial test load migration issues

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Communication – Basecamp

UCS' Project Basecamp is located at:
https://3.basecamp.com/3765443/projects/15553579

Good to Know:

- Basecamp includes the following sections: Message Board, To Dos, Docs & Files, and Schedule

- Public links are being made available for To Do lists and Meeting Notes *(Note: shows top level details only)*

- UCS' Basecamp "Message Board Rules of the Road":
https://3.basecamp.com/3765443/buckets/15553579/messages/2695373914

- **Please DO NOT check anything off of the To Do lists – as it will make the To Do disappear for everyone (EXL and UCS).** The EXL and SILS PMs will work on updating completed tasks/action items.

- Do note that EXL will not be utilizing "Pings" (or direct messages) in Basecamp:
https://3.basecamp.com/3765443/buckets/15553579/messages/2745875155

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01UCS - Alma/Primo VE Project Implementation

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Basecamp To Do Lists – Tour

➢ **Milestones**

➢ **Meetings**

➢ **Alma Trainings**

• Test Load

➢ **Configurations**

➢ **Primo VE**

➢ **Integrations**

• Certification

• Cutover (full list avail in Spring, high-level dates included on Milestones)

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Communication – SalesForce Cases

- The opening and use of the Ex Libris Support Portal or SalesForce **cases** will vary throughout the course of the project.

- Implementation projects tend to be Basecamp *Message Board* heavy in the beginning of the project and then move into using Sales Force *Cases* later in the project where more detailed, complex troubleshooting, and sensitive info is needed, and gathered/shared.

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Communication – SalesForce Cases

TIPS for when to open cases:

- It may help to check with EXL if a case is warranted or not (this could be via Basecamp, in a meeting, etc.).

- During your test load data review, please continue to post related questions/issues to Basecamp, unless in special circumstances in which you are requested to open a case.

- For configuration adjustments, please open a case - if you are a campus where your configurations are closed/locked (*NOTE*: this will be more prevalent during the full implementation).

- For Technical/Integration issues, please begin to ask questions or report issues on Basecamp in the relevant Integrations' To Do list line item. Should a technical issue require further analysis (i.e. needs to be routed to Support or a technical expert) we will request that you open a case.

- Instructions for use of cases related to Cutover will be posted later in the project (Spring 2021).

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Communication – SalesForce Cases

Related Resources:

- Basecamp Post: ***When should UCS open "cases" in SalesForce?:***
https://3.basecamp.com/3765443/buckets/15553579/messages/3090164050
  - Includes details on how to reset your password and create accounts for others to be able to open cases.
  - Also see the ***SalesForce Accounts -How To ResetPW and AddUsers.pptx*** at
https://3.basecamp.com/3765443/buckets/15553579/vaults/3132465787
- **Support Portal User Guide**:
https://knowledge.exlibrisgroup.com/Cross_Product/Support/030_Salesforce/Support_Portal_User_Guide
- ***What is Case Status, and What Does It Mean?:***
https://knowledge.exlibrisgroup.com/Cross_Product/Knowledge_Articles/What_is_Case_Status_and_What_Does_It_Mean

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Escalation Paths with Ex Libris

1. Within Basecamp: add a boost or update your post
2. Within the Customer Support Portal / SalesForce: add an update to your case
3. Contact your SILS PMs: they will discuss the issue with the EXL PM
4. Escalations at Ex Libris are handled by the following:

Project Manager → Marci.Deignan @ExLibrisgroup.com

Project Sponsor → Marina.Spivakov @Ex Librisgroup.com

Regional Professional Services VP → Melissa.Hilbert @Ex Librisgroup.com

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Documentation

Located on the ExLibris Knowledge Center:

- Alma: https://knowledge.exlibrisgroup.com/Alma

- Primo VE:
https://knowledge.exlibrisgroup.com/Primo/Product_Docum
entation/020Primo_VE

- Product Documentation
    - Alma and Primo VE product documentation
    - Alma-Primo Integration
    - How-To Presentations
    - Alma Online Help (OLH) – accessible via the Alma interface

- Project Documentation (Guides & Instructions)
    - Getting Ready for Alma Implementation
    - Technical Requirements
    - Migration & Configuration
    - Testing Data
    - Primo/Alma, and 3rd Party Integrations
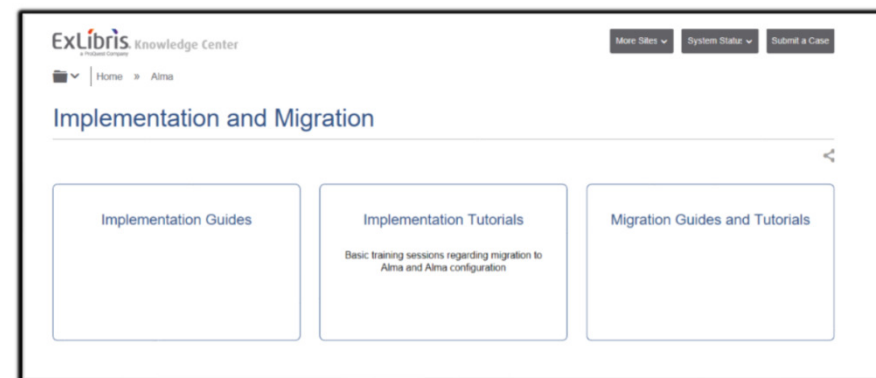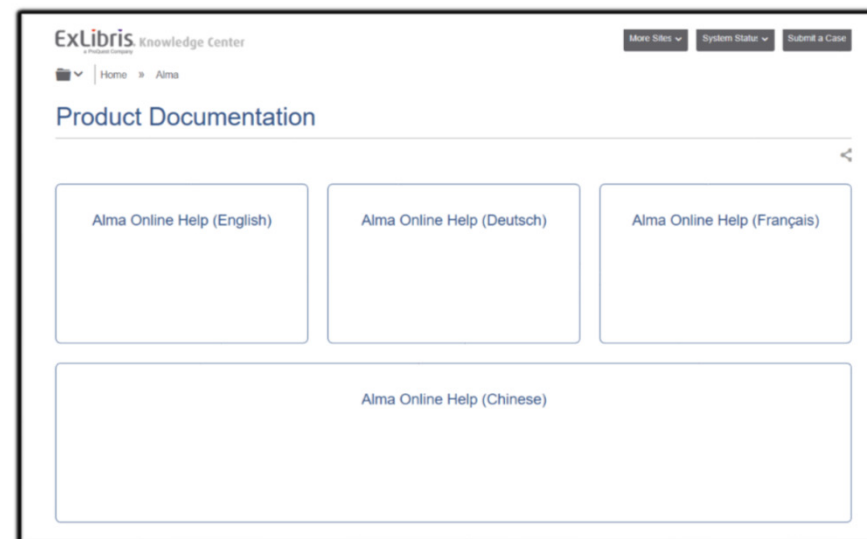
Common Topics

- Alma & Primo VE Environments
    - Sandboxes
    - Production
- Configurations
- Integrations
- Cutover Migration
- Go Live

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Alma & Primo VE Environments – Sandboxes

Alma & Primo VE
Training Sandboxes

- The UCS currently have standard sandboxes (2 IZs and 1 NZ) that are being used during both the Vanguard and Implementation phases (both Alma and Primo VE)

- These sandboxes are populated with generic data from Ex Libris

- These sandboxes are used primarily for training, hands-on exercises and testing new configurations – especially prior to test load.

- The sandboxes can also be used during Cutover for staff training and testing while your production environment is not available.

- Your sandboxes' connection details are available on Basecamp at: https://3.basecamp.com/3765443/buckets/15553579/vaults/2757385149

- Following Go Live, EXL will work with the UCS consortia in delivering your premium sandboxes.

- For more information about your sandboxes during Implementation and following Go Live, please refer to Basecamp post: https://3.basecamp.com/3765443/buckets/15553579/messages/2777178489.

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Alma & Primo VE Environments - Production

Alma & Primo VE
Production

(aka prod)

- Work during Implementation is done on Production *(for existing Alma campuses, it will be on a copy of your production instance)*

- Access granted after test load data is transformed and loaded into the environment

- Used for data review and configuration set up and testing

- Used for Library staff training

- Data reloaded at cutover
  becomes true production environment at Go Live

- Documentation: Your Alma Environment During Cutover (including Data and Configuration Elements Retained at Cutover):
  https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides/01Alma_and_Discovery_Cutover_Process#Your_Alma_Environment_During_Cutover

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Alma Configurations

➢ **Important:** For those campuses who are new to Alma, or do not have an Alma certified staff member by Test Load completion, your configurations will be locked at Alma Test Load delivery.

- Access to some of the Alma configuration menus in the production environment is provided to customers only after successful completion of the Alma Certification Training course and others upon Go Live.
- During the implementation stage of the project, Alma configuration modifications can be made by the Ex Libris implementation team in response to customer testing and feedback.
- SalesForce cases should be opened to request configuration adjustments.
- Configurations will remain unlocked in your Alma sandboxes for review and testing.
- Existing Live Alma campuses are excused from these requirements.

➢ **Resources:**

- *Getting Ready for Alma and Discovery Implementation* guide: https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides/02Getting_Ready_for_Alma_and_Discovery_Implementation#Responsibilities
- Ex Libris Support Portal: https://support.exlibrisgroup.com/

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Integrations

- Review documentation and resources with your IT staff [UCS]

- Attend an integrations overview session [EXL/UCS]

- Review and complete the initial integration spreadsheet (if non-Alma campus and have not done submitted the form already) [UCS]

➢ Critical Integrations: Authentication and Patron Loader/SIS [UCS]

➢ Prioritize other Go Live "must-haves" (Self Check, Bursar, etc.) [UCS]

- Additional integration session(s) will be scheduled as needed [EXL/UCS]

- Integrations configuration and testing [UCS]

Integrations

Resources:

- Integrations To Do List:
    - Includes relevant documentation and trainings
    - https://3.basecamp.com/3765443/buckets/15553579/todolists/3122127824
- Integrations docs & files folder:
    - https://3.basecamp.com/3765443/buckets/15553579/vaults/2379093815
    - Includes integrations form template, and completed campus forms
- Meeting notes from the initial Technical Integrations Overview session on 29 October 2020:
    - https://3.basecamp.com/3765443/buckets/15553579/documents/3054447230

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Migration - Cutover

| Review Detailed Cutover Schedule (~One month before Cutover start) | Submit Final Migration Forms | Freeze work in tech services | Final data migration to Alma | Final data checks and data acceptance | Fulfillment freeze | Use offline circulation module in Alma | Re-extract & re-load Circulation data | Load Alma off-line circulation to Alma | Pass final data checks | Delete and re-create Primo VE index | Go Live! |

Alma and Discovery Cutover Process documentation:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides/01Alma_and_Discovery_Cutover_Process

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Go Live

Go Live with Alma and Discovery

Celebrate with your staff and students

Post Go-Live: Knowledge Acceleration Program

- ## What is it?

  A live webinar program created specifically for libraries who have gone live with Alma in the last six months. This series of six live sessions will focus on a range of topics that libraries often look to optimize in their first year of production, including reviewing and adjusting configuration, Acquisitions workflows, maintaining resources, using Analytics and more

- ## Who Should Attend?

  All library staff are eligible and encouraged to register, attend and participate

- ## What is the time commitment?

  One day a week, for about 60 minutes including live Q&A, over the course of 6 weeks

- ## When should we plan on attending?

  Based on your project timeline, we expect having your staff participate in either a late Fall 2021 or early Spring 2022 Cycle. More details regarding timing, session descriptions and registration will be provided to you by your EXL Project Manager post Go Live (July 2021).

Next Steps – Ex Libris

- Make Kickoff meeting presentations available

- Follow-up on any unanswered questions from the Kickoff meeting

- These will all be added to today's meeting notes located on Basecamp:

    - **5 November 2020: Project Kickoff Meeting**:
      https://3.basecamp.com/3765443/buckets/15553579/documents/3080221451

        - Public link:
          https://public.3.basecamp.com/p/R1hNbk6RkyAZdyHVzzxPceAf

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Next Steps – UCS

From the ***UCS Implementation: Alma Trainings*** To Do list at: https://3.basecamp.com/3765443/buckets/15553579/todolists/3080153168

- Complete the "*Getting to Know Alma, Orientation, and Navigation & Searching*" trainings
- Complete the "*User Management*" trainings and hands-on exercises
- Begin to review the "Fulfillment" module

Familiarize yourself with the upcoming Test Load schedule and deliverable due dates.

The ***UCS Implementation: Test Load Activities and Schedule*** To Do list is at:

https://3.basecamp.com/3765443/buckets/15553579/todolists/3078940349

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Thank you!

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