



Overview of Test Load Migration

University of California Libraries (01UCS)

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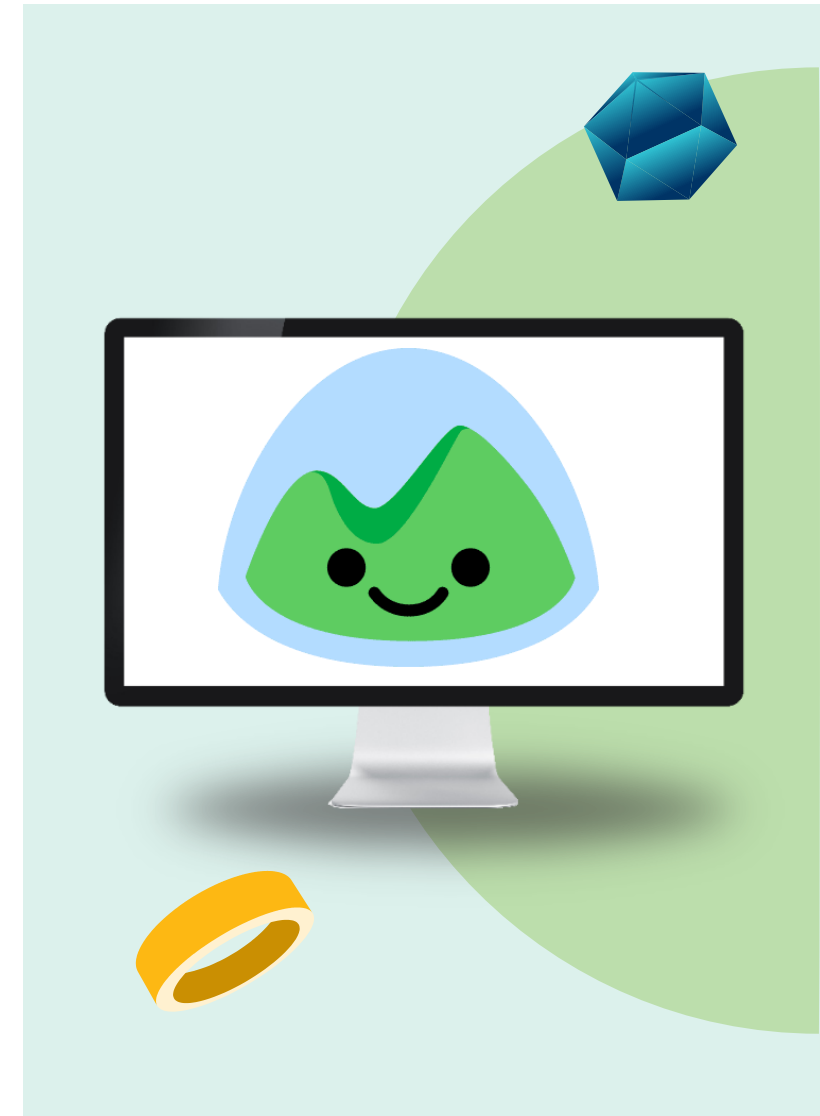


Agenda

- Test load preparation
- Test load deliverables
 - Logistics – Who? What? Where? When?
- Migration process
- EXL delivery of Test load environments to campuses
 - What to expect?
 - How will we be notified?
 - How to report issues?

Test load preparation

- Administrative tasks
 - Confirm campus contacts for Test load cases for non-Vanguard campuses [UCS]
<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940551>
 - Create Test load cases [EXL]
 - Provide NZ population order [UCS]
<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940539>
 - Create MFT shares for non-Vanguard campuses [EXL]
 - All campuses to confirm they can access MFT shares [UCS]
<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940493>
- Review relevant documentation [UCS]
<https://3.basecamp.com/3765443/buckets/15553579/todolists/3078940873>
- Attend Migration meetings [UCS]
<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940440>



Test load preparations continued

- Retain local extensions [UCS]

<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940524>

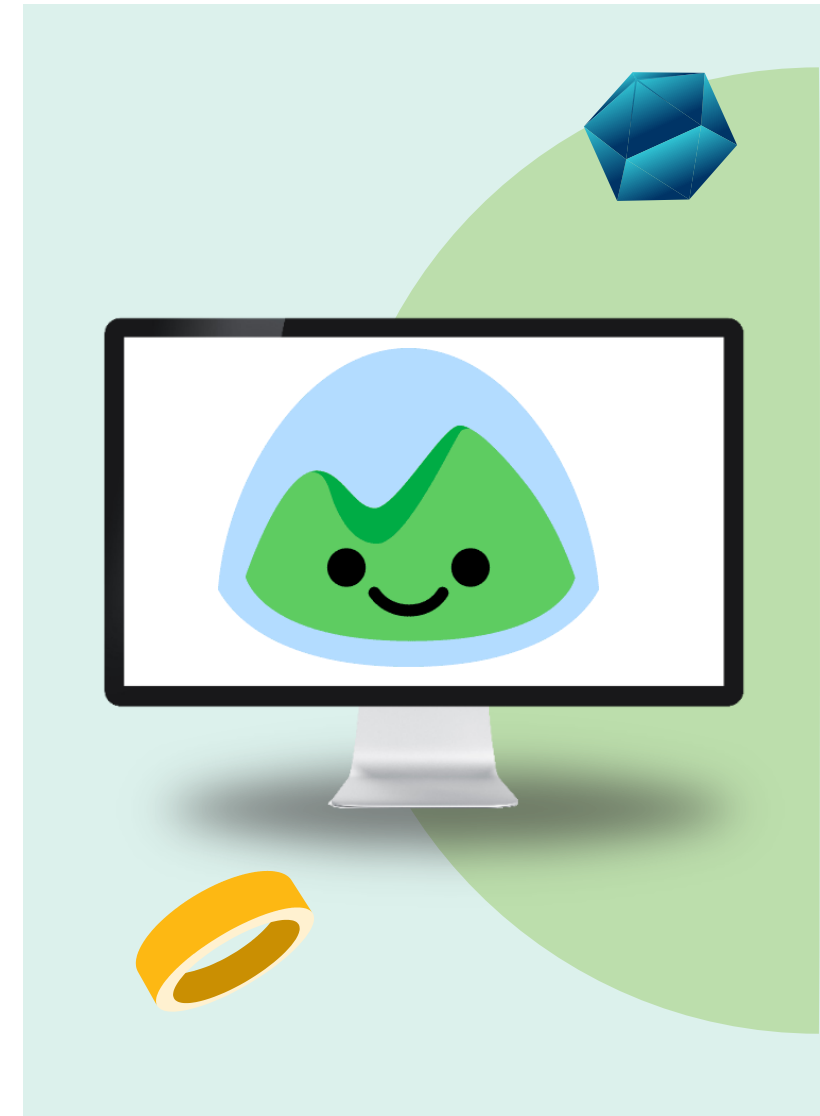
- ILS specific preparations

- Download latest auto-extract kit [Voyager]

<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940398>

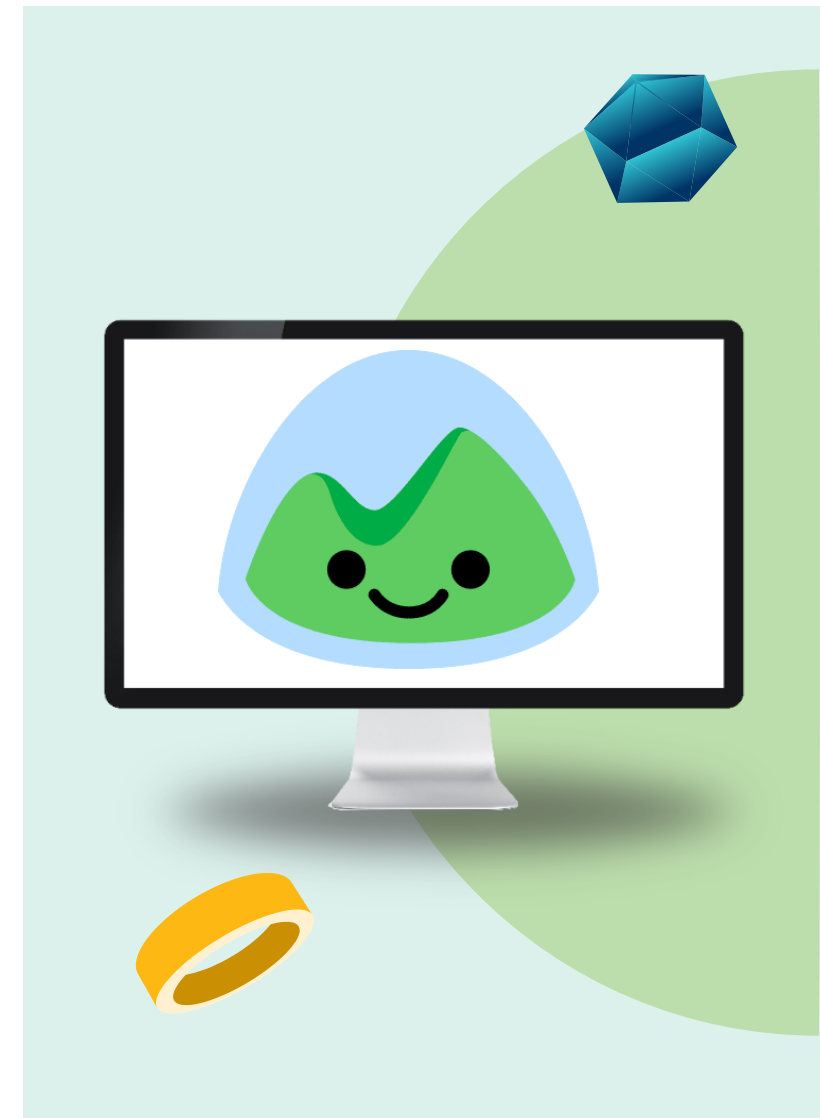
- Download and install the latest Migration File Validation tool [Ill and Alma]

<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940411>



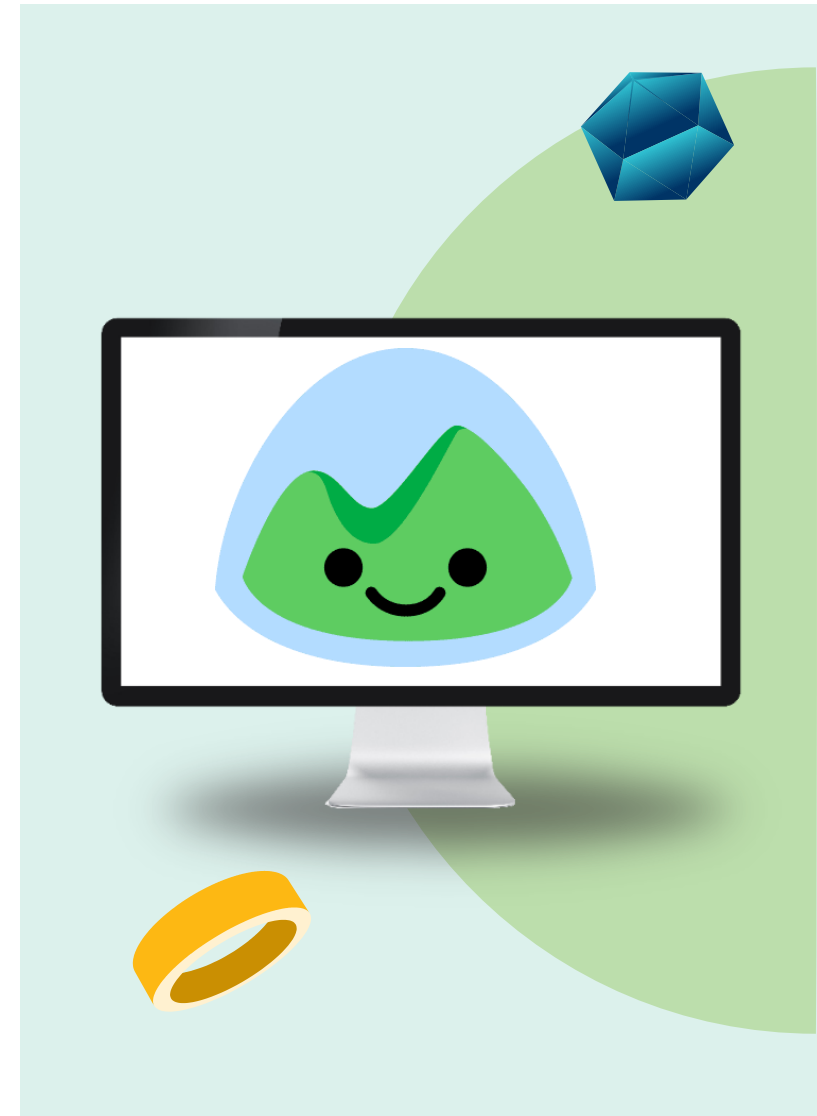
Test load deliverables

- Migration Form
 - Who?
 - All non-Alma campuses except CDL
 - What?
 - Validated DRAFT & FINAL forms are required
 - Where?
 - Download III and WMS specific forms here:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials
 - Generate Voyager migration form on server
 - Attach validated forms to Test load cases
 - When?
 - Validated DRAFT – due Dec 7
 - Validated FINAL – due Dec 14



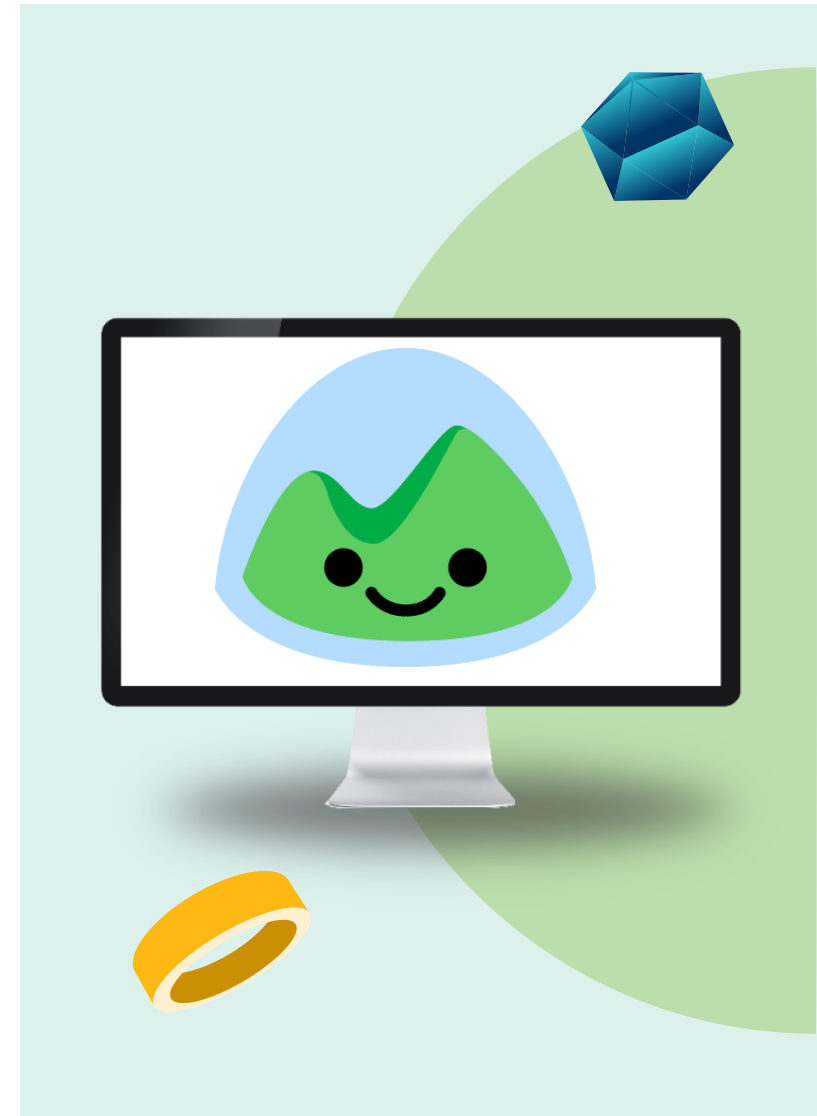
Test load deliverables continued

- Field Mapping forms
 - Who?
 - WMS and III campuses
 - What?
 - FINAL form only
 - Where?
 - Download WMS field mapping form here:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials#ILS_Migrations
 - III field mapping form will be generated using Migration File Validation tool (Import Vanguard form into tool to get started)
 - Attach forms to Test load cases
 - When?
 - Due Dec 14



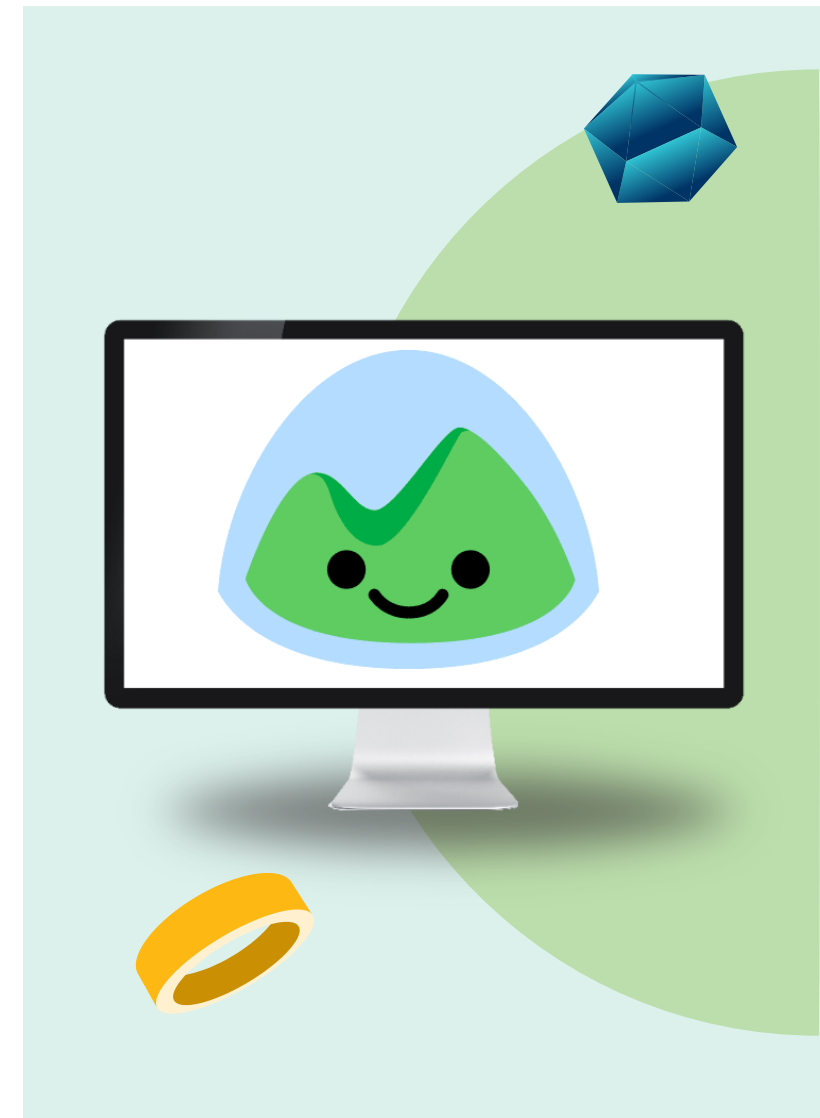
Test load deliverables continued

- P2E files
 - Who?
 - All Voyager and Ill campuses
 - WMS – will be discussed during Migration meeting
 - What?
 - Text file(s) containing bibliographic record IDs for resources in your ILS that represent electronic resources.
 - Where?
 - Manually upload P2E file(s) to MFT
 - When?
 - Due Dec 14



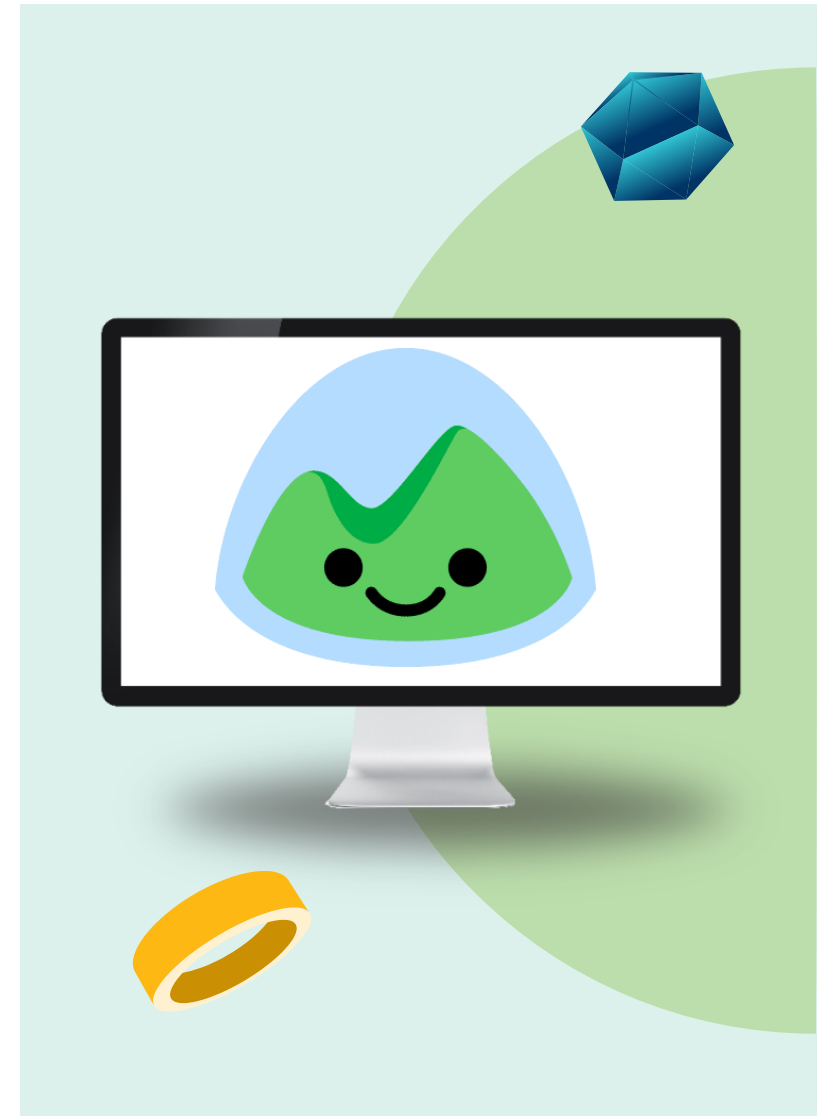
Test load deliverables continued

- ILS Data Extracts
 - Who?
 - All Campuses (Note: only bibliographic records required from Alma campuses and CDL IZ)
 - What?
 - ILS Data extracted according to data delivery specifications in individual ILS Migration guides
 - Where?
 - Voyager campus to transfer from server to MFT
 - III, WMS and Alma campuses to manually upload to MFT
 - When?
 - Due Dec 14



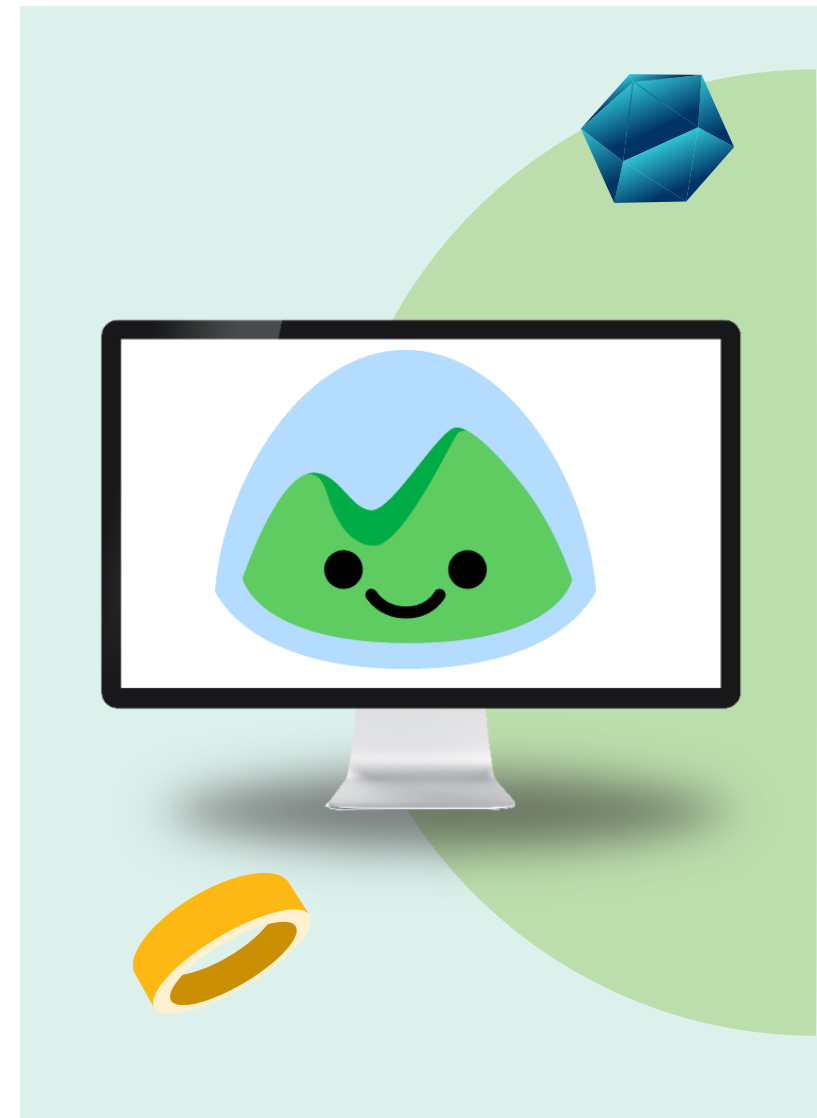
Test load deliverables continued

- Delivered Files List
 - Who?
 - All campuses except UCLA (Voyager)
 - What?
 - Excel spreadsheet to record delivered file names, dates generated, file sizes, number of records in each file and encoding.
 - Where?
 - Download here:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials#ILS_Migrations
 - Manually upload Delivered Files list to MFT
 - When?
 - Due Dec 14



Test load deliverables continued

- 360/Intota Reports and 360 and Intota to Alma Migration form
 - Who?
 - UCLA
 - CDL for 01UCS_NETWORK
 - What?
 - For migration of 360 Core/Link electronic resources and 360RM/Intota resources
 - Where?
 - Generate required reports in 360/Intota Admin interface
 - Download 360 and Intota to Alma Migration form here:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/360_and_Intota_to_Alma_Migration_Guide
 - Manually upload reports and migration form to MFT
 - When?
 - Due Dec 14



Summary of Test load deliverables

Campus	Migration Form	Field Mapping form	P2E file(s)	ILS Extracts	360	Delivered Files List
UC-Berkeley	YES	YES	YES	YES	NO	YES
UC-Los Angeles	YES	NO	YES	YES	YES	NO
UC-San Diego	YES	YES	YES	YES	NO	YES
UC-San Francisco	YES	YES	YES	YES	NO	YES
UC-Santa Barbara	NO	NO	NO	BIBS ONLY	NO	YES
CDL IZ	NO	NO	YES	BIBS ONLY	NO	YES
CDL NZ	NO	NO	YES	BIBS ONLY	YES	YES
UC-Davis	NO	NO	NO	BIBS ONLY	NO	YES
UC-Davis Law	YES	YES	YES	YES	NO	YES
UC-Irvine	NO	NO	NO	BIBS ONLY	NO	YES
UC-Merced	YES	YES	TBD	BIBS ONLY	NO	YES
UC-Riverside	NO	NO	NO	BIBS ONLY	NO	YES
UC-Santa Cruz	NO	NO	NO	BIBS ONLY	NO	YES

Migration process

- Building the Network Zone (NZ)
 - Migration process for non-Alma campuses (IZ)
 - Migration process for Alma campuses (IZ)
 - IZ to NZ linking
 - Migration process for CDL IZ
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- Any ILS specific information will be discussed during the individual migration meetings



EXL delivery of Alma Test load environments to campuses

- What to expect?
- How will we be notified?
- How to report issues?



Schedule of Migration Meetings

- Fri Nov 6 at 10-11 UCB
- Fri Nov 6 at 11-12 UCLA
- Tues Nov 10 at 11-1 UCD Law
- Fri Nov 13 at 10-11 UCSD
- Tues Nov 17 at 11-12 Alma campuses (UCD, UCI, UCR, UCSB, UCSC)
- Wed Nov 18 at 9-11 UCM
- Wed Nov 18 at 11-1 eResources
- Thurs Nov 19 at 10-12 CDL IZ & NZ
- Fri Nov 20 at 10-11 UCSF

<https://3.basecamp.com/3765443/buckets/15553579/todos/3078940440>



Resources

- Review Relevant Documentation

<https://3.basecamp.com/3765443/buckets/15553579/todolists/3078940873>

- Campus Test Load Preparations

<https://3.basecamp.com/3765443/buckets/15553579/todolists/3078940388>

- Campus Test Load Deliverables

<https://3.basecamp.com/3765443/buckets/15553579/todolists/3078940610>

- Final Test Load Work

<https://3.basecamp.com/3765443/buckets/15553579/todolists/3078940795>

- Test Load Migration Resources

<https://3.basecamp.com/3765443/buckets/15553579/vaults/3026427455>

- When should UCS open "cases" in Salesforce?

https://3.basecamp.com/3765443/buckets/15553579/messages/3090164050#_recording_3122472719





Thank you!
