

# **Alma/Primo VE Implementation: Project Objectives, Timeline and IT Impact**

**01CACCL - California Community Colleges  
February 1, 2019**



## Focus on Day 1

- What do we mean by “Day 1”?
- **Go Live** = First day solely using Alma & Primo VE by staff and faculty/patrons

ExLibris  
Alma Primo





# CCC Implementation: Project Objectives

Handoff from Sales to Project Team

Dedicated Project Team

Customer Support & Success teams

### Getting Started/ Planning



Organizational Planning

Current Workflows Review

Data Preparation

Getting Ready Review

 Recurring  
 Onsite

### Implementation & Project Management



Define



Build



Deploy



Kickoff

Access to Alma Production & Primo

Migration (Cutover) & Go Live

Project Plan

Workflow & Data Review



Project Status Calls and Q&A



Training & Sandbox Access

Alma Workshop



Health Check



Configuration & Migration (Test)

Go Live Readiness Checklist

Switch to Support

Certification & Staff Training

### Life in Production



Support Helpdesk & eServices

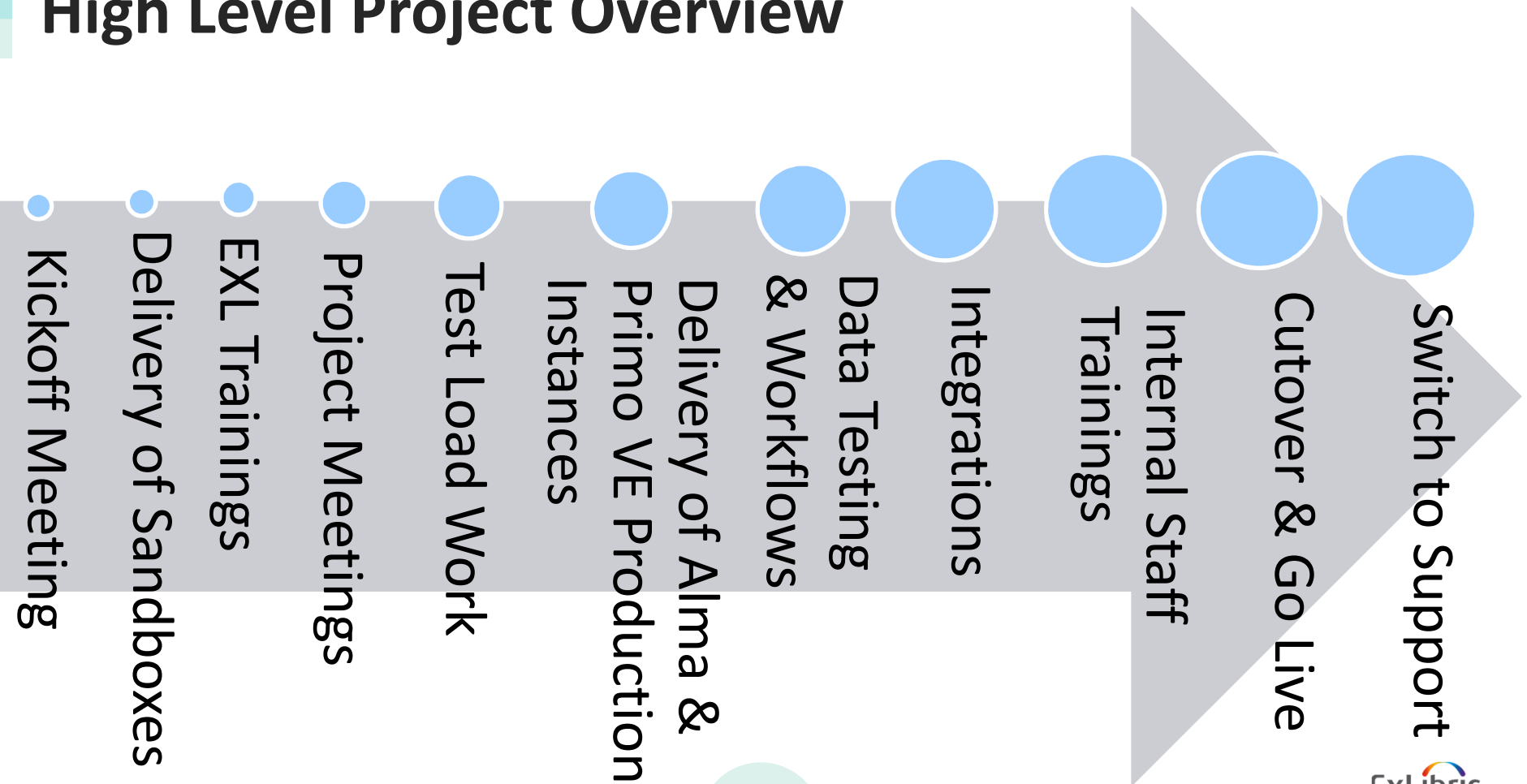
Best Practices Sharing

Value of Investment Analysis

New Releases & Roadmap

Expert Services

# High Level Project Overview



## Access to Sandbox Environments

- Alma & Primo VE sandbox environments will be provided between Kickoff meeting and approx. first weekly call
- 10 Alma institution sandboxes
- Corresponding Primo VE sandboxes
- Project participants will be directed to use specific sandboxes
- Content of standard training sandbox environment provided by and managed by Ex Libris
- NEW: EXL password policy - January 2019\*

## Alma Environments



- Provisioned at the start of the project
- Seeded with generic data
- Access to configuration is granted after “Alma Administration Fundamentals” training is completed
- Used for training and testing new configurations

## Alma Environments



- Access granted after test load data is transformed and loaded into the environment
  - Used for Alma data review, configuration testing, integrations set up, and library staff training
  - Access to configuration is granted after “Alma Administration Certification” is completed
  - Data reloaded at cutover
- **Becomes true production environment at go-live**





# EXL Trainings (Pre-recorded & Live)

## Pre-recorded Trainings

- Alma Essentials
- Alma Administration Fundamentals
- ILS-specific Migration Meetings (*NEW*)
- Primo VE
- Alma Certification
- Primo Certification



# EXL Trainings (Pre-recorded & Live)

## Live Trainings\*

- Link Resolver & P2E Migrations
- Configuration
- Alma Implementation Series (*NEW\**)
- Using Alma for Data Review
- Alma Workshop(s)
- Cutover Preparations & Planning



## Project Meetings (Weekly & Special)

- Weekly Project Status Meetings (1 hour)
- Tuesdays @ 11am PT
- Meetings will include:
  - Project status updates
  - Q&As\*
- Meetings will be recorded

## Project Meetings (Weekly & Special)

- Weekly EXL Office Hours (2 hour block)
- Wednesdays @ 10am – 12pm PT
  - Will initially be used for live trainings and/or special meetings (i.e. Link Resolver and Configuration form) – *will be recorded*
  - Avoids having to schedule additional meetings throughout the project
  - Will change to on-call EXL consultants for as-needed stop-ins



## Test Load (Migration & Configuration)

- Site migration preparation work in advance of test load (data extracts, forms, etc.)
- Trainings will be a combination of pre-recorded and live sessions
- Configuration work will be phased to occur after migration prep work is completed

## Test Load (Migration & Configuration)

- Additional time for migration/configuration-related Q&A during EXL office hours
- Timing set up to accommodate both draft and final forms (for EXL review and site revision)
- Delivery of Production Environments (incl. Primo VE) occurs at the end of test load work



## Project Overview (cont'd)

- **Data Testing & Workflow Reviews**
  - Occurring after delivery of test load (production environments)
  - “Using Alma for Data Review” session
  - Alma Workshop
  - Configuration adjustments
  - CCC Working Group decisions (incl. Network Zone and Resource Sharing)



## Project Overview (cont'd)

- **Integrations** work (production environments required first)
- **Internal Staff Training**
  - “Train the Trainer” approach
  - Site implementation team rolls out training to full staff



## Cutover & Go Live

- Cutover plan and schedule review meeting
- Review Go-Live Readiness Checklist
- Requires new data files and migration-related forms (plus P2E & LR)
- No new configuration form needed
- Will require a data freeze in sites' current ILS (and no access to Alma prod)
- May require an additional data extract (Fulfillment / Circulation)

## Cutover & Go Live

- Go Live = all staff using Alma for daily work, Primo VE made available to end users
- Detailed Cutover & Go Live schedule TBD after test load
- Planning by EXL & Migration occurs after the test load – due to run times per institution, and need for calculating full timing required for Cutover.

## Data Extracts for Test Load & Cutover

- Each institution is responsible for providing their (non-EXL ILS) data extracts to EXL
- ILS data extract terms are based on the agreement between each institution and their ILS vendor.
- Non-EXL ILS sites should review the terms to determine:
  - If the ILS is hosted by the vendor vs. locally installed
  - If the ILS vendor allows direct data extraction vs. mediated by the vendor
- **KEY:** Be aware that ILS vendor costs and restrictive timelines may be associated with your data extractions

## Data Extracts for Test Load & Cutover

- For the upcoming test load, sites should begin planning for data extracts now
- What data does EXL need? See:  
[https://knowledge.exlibrisgroup.com/Alma/Implementation and Migration/Migration Guides](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides)
- Refer to the documentation specific to your ILS
  - *[Your ILS] to Alma Data Delivery Specifications*
  - *[Your ILS] to Alma Migration Guide*

## Data Extracts for Test Load & Cutover

- How many data extracts will each site need in total?
- Projects require 3\*
  - [Extract 1] Test Load
  - [Extract 2] Cutover (full extract),
  - [Extract 3] Fulfillment Cutover (Circ/patrons data only)\*

## Data Extracts for Test Load & Cutover

- Fulfillment Cutover data extract is optional ONLY if site agrees to use Offline Circulation for the entire length of the Cutover until Go Live (could last a month)
  - [Extract 1] Test Load
  - [Extract 2] Cutover (full extract)

TIP: Vanguards may consider reusing their VG TL data



# CCC Implementation: Project Timeline Overview



## Implementation Project Timeline

- Canvas use for recording/tracking:
  - Meetings / Trainings
  - Assignments & Hands-on Exercises
  - Deliverables
    - CCC
    - EXL
  - Project Milestones



# Implementation Project Timeline

Month(s)	Milestone
Week of 5 Feb 2019	Delivery of Alma & Primo VE Sandboxes
5 Feb 2019	Begin Alma Training Series
5 Feb 2019	Canvas Tour & Project Calendar Review
5 Feb 2019	Start of Weekly Project Status Calls & EXL Office Hours

## Implementation Project Timeline

Month(s)	Milestone
5 Feb 2019	Begin Planning for ILS Data Extracts (TL)
15 Feb 2019	Watch Migration Trainings (TL)
15 Feb 2019	Attend Link Resolver & P2E Training (TL)
1-8 March 2019	Draft & final migration data and forms completed/submitted (TL)
15 March - 15 April 2019	EXL Migration Work (TL)

## Implementation Project Timeline

Month(s)	Milestone
3 April 2019	Attend Configuration Meeting (TL)
12-19 April 2019	Draft & final Configuration data forms completed/submitted (TL)
15-30 April 2019	Production Alma & Primo VE environments delivered (TL)
April 2019	“Using Alma for Data Review” training

# Implementation Project Timeline

Month(s)	Milestone
April-May 2019	Onsite Alma Workshop
April-Oct 2019	Integrations Work*
April-Nov 2019	Alma Data Testing & Workflows
May-August 2019	NOTE: Institutional Summer Schedules / Breaks

## Implementation Project Timeline

Month(s)	Milestone
May-Nov 2019	Primo Customization Work
Aug-Dec 2019	Internal Staff Trainings
Sept 2019	Complete Alma Certification
Sept 2019	Complete Primo Certification
Sept-Oct 2019	Finalize Configurations

## Implementation Project Timeline

Month(s)	Milestone
Sept-Oct 2019	Attend Cutover/Go Live Planning Review Meeting (CO)
Sept-Oct 2019	Attend Go Live Readiness Meeting (CO)
Sept-Nov 2019	Cutover Preparations / Submitting Data files & forms (CO)
Nov-Dec 2019	EXL Migration Work (CO)

# Implementation Project Timeline

Month(s)	Milestone
Nov-Dec 2019	Alma Data Review & Acceptance (CO)
Nov-Dec 2019	Primo Review & Acceptance (CO)
Nov-Dec 2019	Go Live – Alma & Primo



# CCC Implementation: Project IT Work and Integrations



# EXL Integrations: Day 1 Approach

## Configured at Test Load (by EXL)

- Search Configuration: External Resources Search
- Publish records to Primo Central
- Z39.50 Server
- Resolver Proxy & Augmentation
- Importing Records from OCLC Connexion



# EXL Integrations: Day 1 Approach

## Required for Day 1 (per EXL)

- Student Information Systems (SIS)
- Authentication (Alma / Primo VE)



# EXL Integrations: Day 1 Approach

## Sites Will Also Need for Day 1

- Label Printing
- General Printing
- Self-Check Machines\*
- RFID\*
- ILL\*



## EXL Integrations: Day 1 Approach

### **Sites May Need Soon/Immediately After Go Live**

- Publish holding/bibliographic records to OCLC
- Publish electronic records to Google Scholar

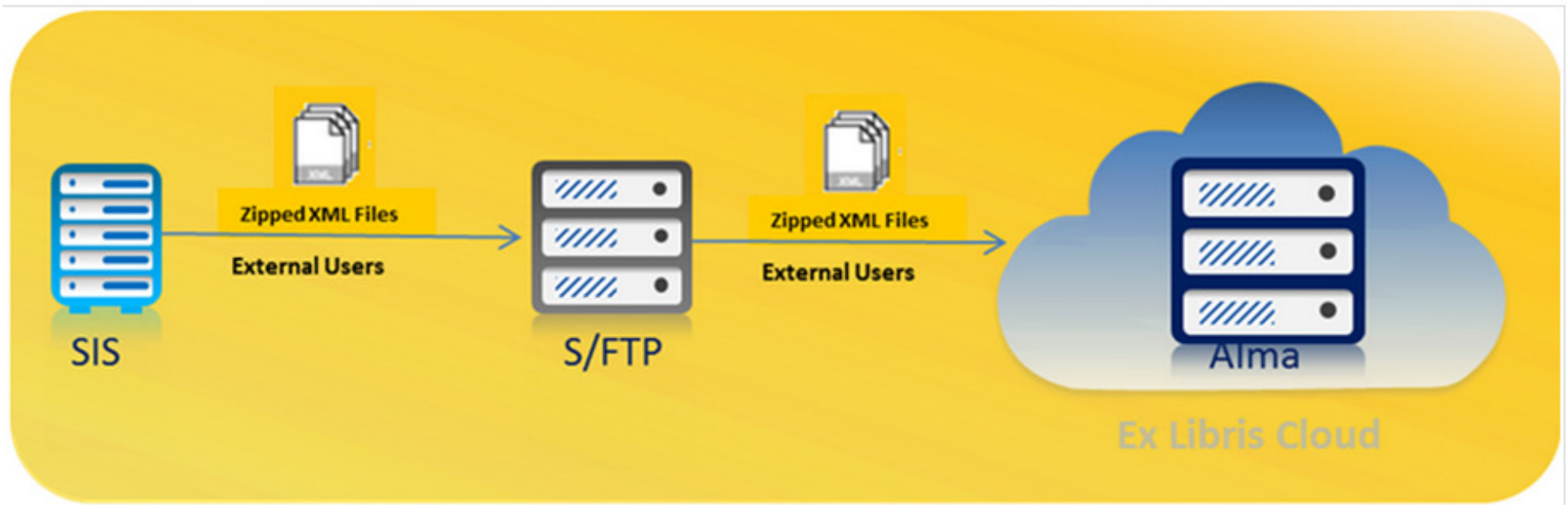


## Integration Technical Details – SIS

- Student Information System
  - Colleague, Banner, PeopleSoft, homegrown systems
  - CCC ID presence in data

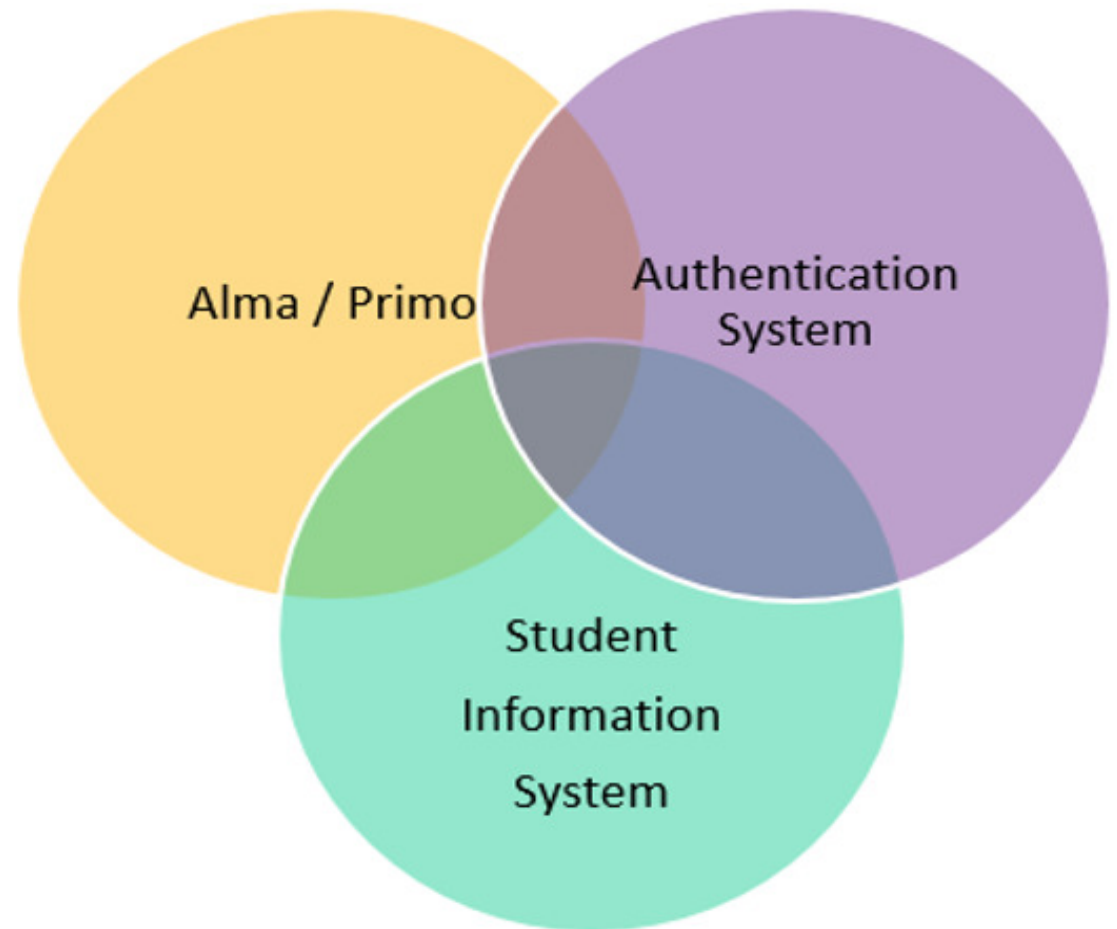
# Integration Technical Details – SFTP

- S/FTP server is needed



## Integration Technical Details – Authentication

- External Authentication:
  - LDAP
  - Shibboleth/SAML
  - CAS
- Internal Authentication:
  - EXL IDP



## IT Impact Timeline

Month(s)	Milestone
Jan – March 2019	Day 1 integrations* for Vanguard institutions can be configured and tested in production environment
March 2019	IT report on status of integrations for Vanguard institutions, provide timing estimates for implementation phase
April 2019	Alma production environments available for implementation phase participants



## IT Impact Timeline

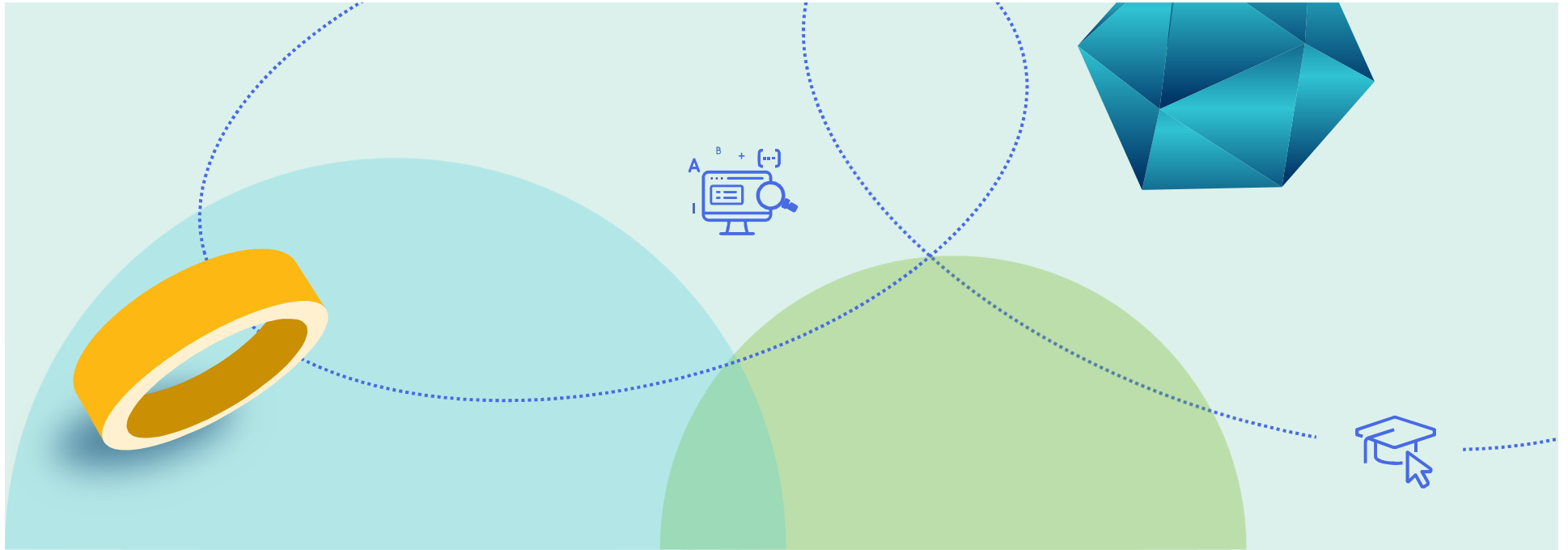
Month(s)	Milestone
April 2019	IT planning for integrations for implementation phase
May 2019	IT begin integrations work for implementation phase
May 2019	S/FTP server needs to be in place

## IT Impact Timeline

Month(s)	Milestone
June - Sept 2019	Authentication set up and testing for all sites
June - Sept 2019	SIS load /API testing for all sites
September 2019	Additional integrations configured if needed *

## IT Impact Timeline

Month(s)	Milestone
October 2019	Finalize integration configurations and testing
Oct-Dec 2019	Cutover / Go Live
January 2020	Adjustments as needed



## Additional Questions / Discussion



Thank you!