



Migration and Configuration Overview

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Migration Overview



Migration Overview

- Migration Process
 - The process of transforming source data to Alma format
- Test load:
 - Timeframe: March-April 2019
 - 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: November-December 2019
 - All data from all sources is loaded again at cutover
 - Configuration retained

Migration Overview

Building the Network Zone

Step	Description
Bib data migrated to institutional Alma instances	Bibliographic data is migrated based upon extracts and provide migration form(s)
Bib data loaded to shared catalog	California Community Colleges determines the order in which the colleges should be loaded to the network zone
Bib data is dedup-ed	Data de-duped via linking to NZ, if matches already existing record in the NZ based on OCLC number. <ul style="list-style-type: none">• Linking is done based on 035 a,z OCLC number• Prefix (OCoLC), ocn, ocm in 035 a,z is <u>mandatory</u>

Migration Overview

Environments

Sandbox
GENERIC DATA

Production Environments:
YOUR DATA
(both test load and cutover)

Implementation
(For Ex Libris)

Hosted in our North American Data Center



Migration Overview

- **ILS**
 - **Bibliographic records**
 - **Item Records**
 - **Patron Records**
 - **Fulfillment:** *Active* loans, requests currently on the hold shelf, fines and fees
 - **P2E:** a process to convert electronic resources from physical to the Alma electronic resource format
 - Only for electronic resource records contained in your ILS
- **Link Resolver**
 - Activates electronic resources in the Alma Community Zone

Migration Inputs by ILS

ILS	Migration Form	Field Mapping Form	P2E File	Delivered Files List	Auto Extract Kit Available	Data Validation Tool Available
Ex Libris Voyager	✓		✓		✓	
III Polaris	✓	✓	✓	✓		
III Sierra/Millennium	✓		✓			✓
Sirsi Symphony	✓		✓			✓
Sirsi Horizon	✓		✓			✓
Koha	✓	✓	✓	✓		
OCLC WMS	✓	✓	✓	✓		
AutoGraphics	✓	✓	✓	✓		
TLC Library Solution	✓	✓	✓	✓		
Alexandria	✓	✓	✓	✓		



Link Resolver Migration Inputs

- **SFX**
 - Extracted and loaded by the migration team
- **ProQuest 360Link**
 - 360Link files from Customer Center
 - Fill out Local Parameters Form
- **Other (Ebsco LinkSource, OCLC, etc.)**
 - Fill out Local Link Resolver Activation Form
 - Fill out Local Parameters Form



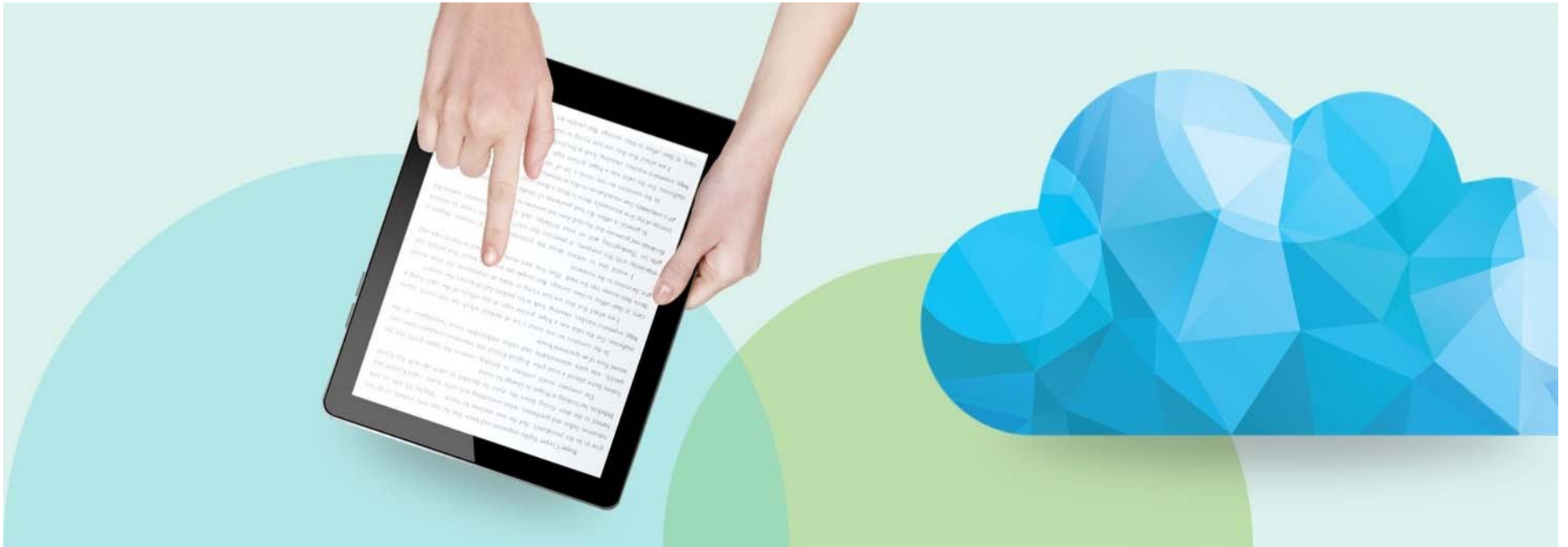
Migration Overview

Logistics

- Salesforce Case for CALCOMM for Test load
- 1 case per institution
- All files and communication about specific adjustments/scenarios via institution-specific case
- General questions – Canvas

Filenames

- Suggested format
 - INST_FORM_DATE_V
 - Ex. VCCC_P2E_03032019_v2
- Refer to filename in comments to avoid confusion
- Avoid using copy/paste in the forms – it can cause forms to lock up.



Migration Overview: Form Previews



Migration Form

- Migration Forms are used to determine how to map your current data into Alma
- Migration Forms differ by ILS!
 - Each ILS has it's own unique data structure that we need to account for!
- However, there are a lot of commonalities:
 - Libraries: *your physical libraries including address information*
 - Locations: *how your physical items are shelved within the library*
 - Item Types
 - User Groups
 - General information: *MARC organization code, the current fiscal year, currency, and a few other details!*
- Preview of Generic and Voyager Migration Forms



Field Mapping Form

- The Field Mapping Form is required for most ILSes, with the following exceptions:
 - Voyager
 - Millennium and Sierra
 - Symphony
 - Horizon
- Use this form to tell us what the field names are in your data extracts

Field Mapping Form

##Fill in the local field name which corresponds to the expected field name.##

##ExL Expected field name##	##Local Field##	##Notes##
ItemRecordID	ItemRecordID	matches item ID in loans, fines
ItemStatus	ItemStatusDescr	use in Item Base Status map
AssociatedBibRecordID	AssociatedBibRecordID	
MaterialType	MaterialTypeDescription	use in Alma Item Type map
ShelfLocation	ShelfLocationDescription	use in Alma Location map, with Assigned Collection
Barcode	ItemBarcode	
AssignedCollection	CollectionName	use in Alma Location map, with ShelfLocation
StatisticalCode	ItemStatCodeDescr	
LastCircTransactionDate	LastCircTransactionDate	
ShelvingScheme	ShelvingSchemeDescr	use in Shelving Scheme map
CallNumberPrefix	CallNumberPrefix	
ClassificationNumber	ClassificationNumber	
OwningBranch	ItemAssignedBranch	
LastInventoryDate	LastInventoryDate	
LoanPeriod	LoanPeriodDescription	



|ItemRecordID,ItemStatusDescr,AssociatedBibRecordID,ItemAssignedBranch,MaterialTypeDescription,ShelfLocationDescription,



Link Resolver

- Purpose of the form:
 - List the eResources you subscribe to so that Migration activates them in Alma Community Zone
- Form Preview!
 - SFX: *no form or files are required*
 - 360: *Tracked Resources and Database Details reports from Client Center*
 - No LR or Other LR: *Local Link Resolver form*



P2E File

- Purpose of the file:
 - Convert ILS records that represent electronic records into true electronic records in Alma
- File Overview
 - List bib record numbers in a csv file
 - Note electronic location in Migration Form
- File Example
- Worried about duplication?
 - All migration forms allow you to skip records with a certain 035 prefix
 - You'll want to skip all ILS records since you'll be using the Alma community zone!



Post Test Load Meetings



Using Alma For Data Review

Timing: *April 2019*

Purpose: *in depth review of searching techniques to find/analyze data in Alma*

Examples:

- Are items in the correct process type?
- Are there any standalone bibs?
- Were records missing on the P2E file?
- Do you have only your patrons (or do you have patrons that don't belong to you)?



Common Post Go Live Cleanup Processes

Timing: *Fall/Winter 2019*

Purpose: *Review common clean-up tasks*

Examples:

- Technical Migration Process Type
- Duplicate eResources
- Adding P2E portfolios to a local collection
- Updating item material types



Configuration Overview



Configuration Form

Purpose of the form:

- Evaluate current policies and consider streamlining
 - The majority of the form is designed around setting up initial *fulfillment and circulation* policies
- Starting point for configuration
- Adjusted as needed throughout the implementation!



Configuration Form

Pre-populated from the migration form: *libraries, locations, user groups and item policies will be there!*

Recommended order of completion

1. Fulfillment: location types & patron types
2. Libraries: libraries & open hours
3. Printers
4. Circ Desks
5. Locations
6. Users
7. Policies, TOU & Rules
8. Booking (optional)
9. Acquisitions
10. Resource Management
11. General



Fulfillment Configuration Demonstration

Demo in Alma!

Configuration Form: Location Types/Fulfillment Units

- Alma uses a Location-based approach
- Location Types = Fulfillment Units in Alma
 - Group together locations that *largely* circulate in the same way
 - These locations can be in separate libraries!
 - Location Type populates dropdowns in the *Locations* and *Policies, TOU & Rules* tabs
 - You'll map locations to the location types on the *Locations tab*
 - Max of 5 Location Types on the configuration form
 - More can be added in Alma as needed!



Configuration Form: Users

- Patron Types
 - Patron Types only exist as a grouping mechanism on this form – you will use User Groups in Alma
 - Group together User Groups for whom materials circulate similarly
- Max of 4 on the configuration form
 - More granularity can be added in Alma
- Populates the Patron Type field in the *Users* Tab and the *Policies, TOU and Rules* Tab

Configuration Form: Item Exception Types

Exception Types

- Use to create exceptions to the default fulfillment rules set up for Location Type/Patron Type combo
- Max of 5 on the configuration form
- Populates drop-downs in Item Policies Tab and Policies TOU & Rules Tab
- Item Policies Tab maps exception types to item policy codes

Exception TYPES are applied to ALL Fulfillment Units

- More granular exceptions can be set up in Alma later!
- In Alma, you will be able to create exceptions based on: *User Group, Material Type, Item Policy, Location, Process Type, and Job Category*



Configuration Form: General

- Auto Renew Rules
- Overdue & Lost Loan Rules
- Requests
 - What triggers a recall?
 - What actions should be blocked?
 - Which types of requests should show up on the Pick from Shelf List?
- Standard Library Hours (as well as closures and extended hours)

Configuration Form: Printing

- Alma uses email printing. New printers are email-enabled.
- If you don't have email-enabled printers, you will use...
 - A dedicated email address for printing.
 - External software (Outlook or Thunderbird)
 - Note: If using Outlook, in order to automatically print, Outlook should be installed on the server.

Want to get a head start on external software for printing?

- <https://developers.exlibrisgroup.com/blog/Printing-in-Alma>
- <https://developers.exlibrisgroup.com/blog/outlook-as-a-print-proxy>
- <https://developers.exlibrisgroup.com/blog/Alma-Printing-via-Outlook>

Note: PaperCut will not work – it does not print emails (only images & attachments)



Configuration Form

In Summary, we'll use the configuration form to:

- Set up your Circ desks
- Define your ***BASELINE*** circulation policies
- General Acq Settings
 - Currency
 - Which libraries purchase for other libraries
- General RM Settings
 - Local Indexes
 - Barcode Generation
- General Settings
 - Time Zone
 - Date Format

A hand is holding a sheet of white graph paper. The background is light blue with a protractor in the top left and a bouquet of purple flowers in the top right. The text 'Thank you!' is centered on the graph paper.

Thank you!

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