



**Alma & Primo Project Status Monthly Report
California Community College Libraries (01CACCL)
Vanguard Phase
January 2019**

| | | |
|--------------|---|---|
| To: | Amy Beadle | LSP Project Director/Statewide Program Manager; Project Lead, California Community Colleges Technology Center |
| From: | Marci Deignan | Project Manager, Professional Services, Ex Libris North America |
| CC: | Amy Carbonaro | CCCTC, Statewide Program Manager, California Community Colleges Technology Center at California Community College Libraries |
| | Melissa Hilbert | VP Professional Services, Ex Libris North America |
| | Mike Hommel | Senior Account Manager, Ex Libris North America |
| | Ex Libris Calcomm Alma-Primo Project List | |
| Date: | 3 February 2019 | |

Project Milestones Summary: January – all milestones on track

| # | Milestone | Owner | Timeframe | Status |
|---|--|-----------------------|-------------------|------------------|
| 1 | Kickoff meeting | EXL / CACCL- VG | September 2018 | Completed |
| 2 | Delivery of Alma & Primo VE sandboxes | EXL | September 2018 | Completed |
| 3 | Review of Basecamp and Alma training schedule (with first weekly call) | EXL / CACCL- VG | September 2018 | Completed |
| 4 | Alma Migration Meetings (5 separate – based on ILS) | EXL / CACCL- VG | September 2018 | Completed |
| 5 | Completion/Return of Alma Migration & Link Resolver forms | CACCL- VG | October 2018 | Completed |
| 6 | Completion/Return of P2E Spreadsheets | CACCL- VG | October 2018 | Completed |



| | | | | |
|----|--|----------------|---|---|
| 7 | Alma Configuration Meeting | EXL / CACCL-VG | November 2018 | Completed |
| 8 | Completion/Return of Configuration Form | EXL / CACCL-VG | November 2018 | Completed |
| 9 | Test Load | EXL Migration | November 2018 | Completed |
| 10 | Alma Production Environment Delivered | EXL | December 2018 | Completed |
| 11 | Using Alma for Data Review Training | EXL / CACCL-VG | Updated - February 2019 | Meeting occurs 4 February 2019 |
| 12 | Initial Data Testing and Feedback (for VG Test Load) | CACCL-VG | Updated - January 2019 (through Spring test load) | Work available until 15 March 2019 |
| 13 | Alma Workshop | EXL / CACCL-VG | December 2018 | Completed |
| 14 | Alma Certification | CACCL-VG | January 2019 | Completed (11 institutions / 26 staff) |
| 15 | Primo-Alma Integration Begins | EXL / CACCL-VG | Updated - January 2019 | Completed |
| 16 | Begin review of Primo VE trainings | CACCL-VG | Updated - January 2019 | <i>In Process</i> |
| 17 | Primo VE Handoff / First Look | EXL / CACCL-VG | January 2019 | Completed |
| 18 | Primo VE Certification | CACCL-VG | February 2019 | To be completed by 28 February 2019 |
| 19 | CACCL Full Implementation Phase Kickoff | EXL / CACCL | Updated - February 2019 | Completed |

Planning and work to begin during Vanguard phase – and will continue through the full implementation phase

EXL Chicago Office: 1350 E. Touhy Ave. Suite 150W, Des Plaines, IL 60018

Toll Free: 800 762 6300 Tel: 847 296 2200 Fax: 847 296 5636

EXL Boston Office: 313 Washington Street, Suite 308, Newton, MA 02458

Toll Free: 866 232 0202 Tel: 617 332 8800 Fax: 617 332 9600



| | | | |
|-------------------------------------|----------------|-------------------------|---|
| Alma Collaborative Network planning | EXL / CACCL | Updated - January 2019+ | *Trainings are avail on EXL KC; NZ decisions coming from CCC Working Group(s) |
| SIS Work | EXL / CACCL-VG | Updated - January 2019+ | SIS details shared on Basecamp; will discuss during 11 Feb VG meeting; VGs can complete initial set up by 15 March 2019 |
| Authentication for Alma | EXL / CACCL-VG | Updated - January 2019+ | Authentication details shared on Basecamp; will discuss during 11 Feb VG meeting; VGs can complete initial set up by 15 March 2019 |
| Authentication for Primo VE | EXL / CACCL-VG | Updated - January 2019+ | Authentication details shared on Basecamp; will discuss during 11 Feb 11 VG meeting; VGs can complete initial set up by 15 March 2019 |
| 3 rd Party Integrations | EXL / CACCL-VG | Updated - January 2019+ | *Trainings are avail on EXL KC; EXL provided CCC Day 1 options; VGs can complete initial set up by 15 March 2019 |
| Internal Staff Training | CACCL-VG | Ongoing | Ongoing |

This is an official record of the status of your project. Please review the above status report and respond to Ex Libris if this report does not accurately reflect your understanding.

EXL Chicago Office: 1350 E. Touhy Ave. Suite 150W, Des Plaines, IL 60018

Toll Free: 800 762 6300 Tel: 847 296 2200 Fax: 847 296 5636

EXL Boston Office: 313 Washington Street, Suite 308, Newton, MA 02458

Toll Free: 866 232 0202 Tel: 617 332 8800 Fax: 617 332 9600