Agenda

Welcome

Team Introductions

General Project Overview

Your Project
- Scope

- Timeline Review

- Communication

- Documentation
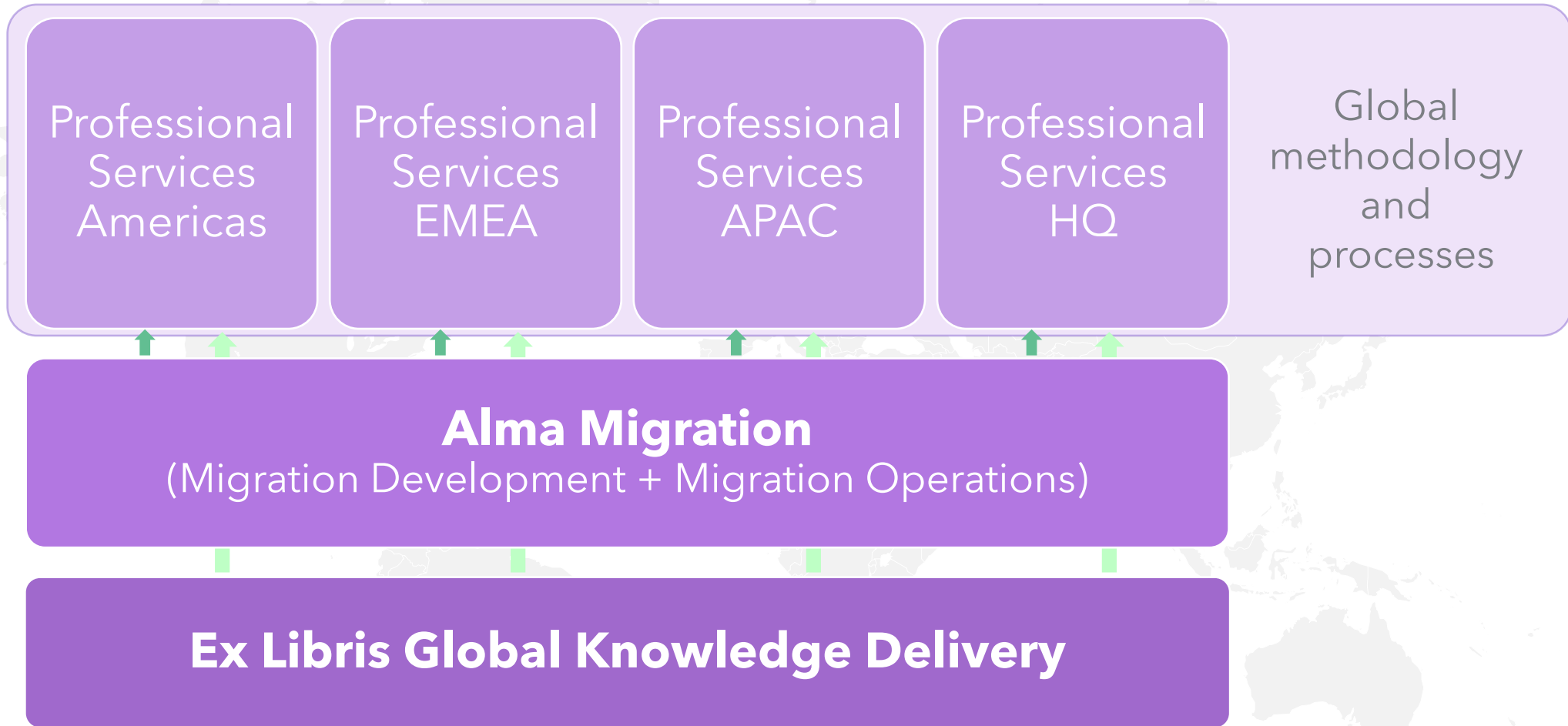
- Next Steps

Q&A

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ExLibris Global Professional Services
Think global – Act local

Professional Services Americas	Professional Services EMEA	Professional Services APAC	Professional Services HQ	Global methodology and processes

Alma Migration
(Migration Development + Migration Operations)

Ex Libris Global Knowledge Delivery

Meet Ex Libris Team

Ashley DeHaye
Sr. Team Lead, Project Mgmt

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

Laney Knight
Implementation Consultant

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

Barbara Andress
Migration Consultant

- Data Migration & Support
- Migration form overviews and feedback
- Test Load and Cutover

Meet Ex Libris Team

Infrastructure Team

- Authentication configuration
- Work with your IT team

Dolph Chaney

Director, Project Management

- Jessica Alverson: Implementation / Functional
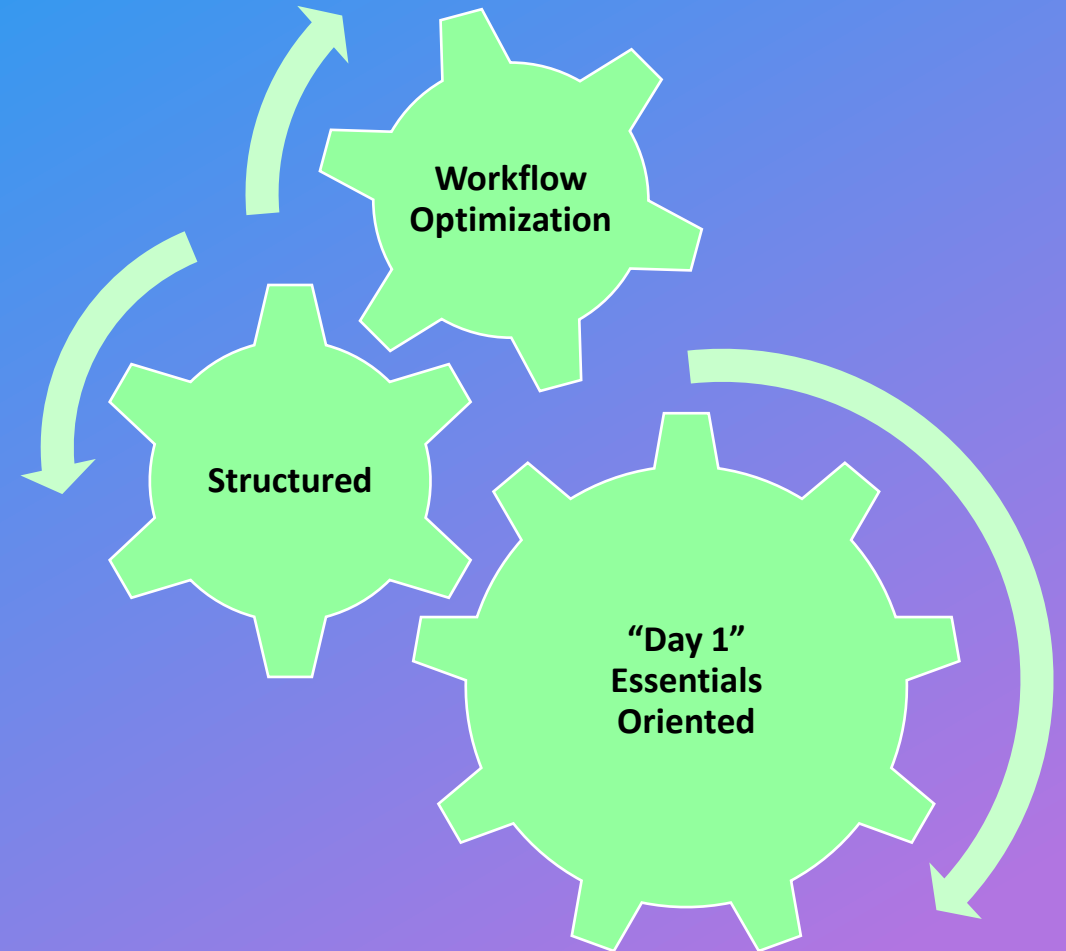- Leah Bokar: Migration / Technical
- Ashley DeHaye: Project Management

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Roles and Responsibilities

Customer Team Responsibilities

- Manage library project team
- Manage 3rd party integrations
- Use and complete implementation tools
- View training and conduct staff training
- Collaborate and define configuration after optimizing library workflows
- Review and approve data migration and configuration

Ex Libris Team Responsibilities

- Provide project management
- Implement Alma and Discovery
- Supply implementation tools
- Provide training and consulting services
- Map and migrate data
- Establish initial configuration

Initial Planning and Focus

- Suggested Organizational Planning

  - Identify stakeholders and engage them

  - Communicate project goals and status to management and stakeholders

- Workflow Analysis

  - Analyze current work (flow and outcomes)

  - Identify possible Workflow optimizations

- Plan Internal staff training

  - Identify internal trainers and trainees
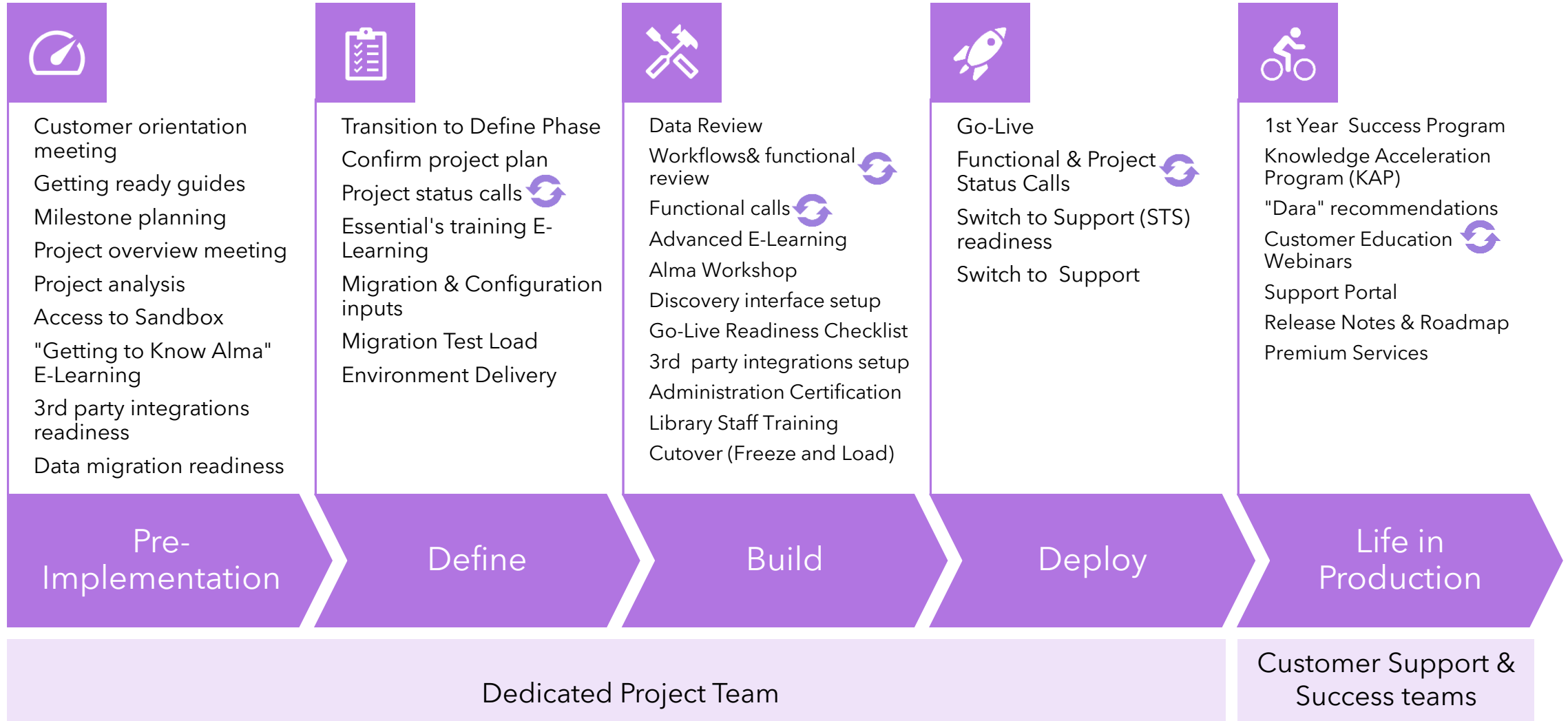
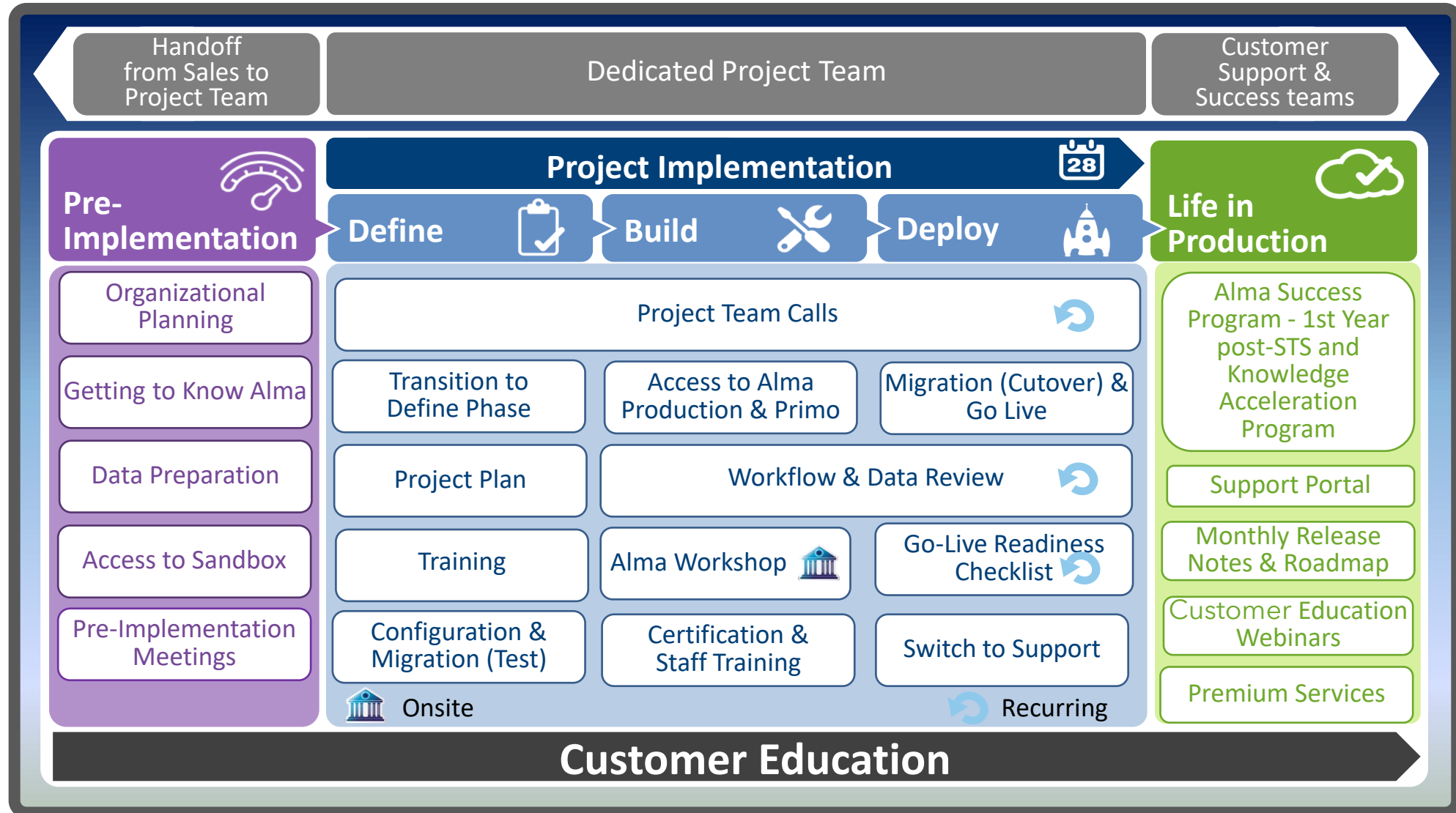 - Develop training scheduling

Implementation Focus

Workflow Optimization

Structured

"Day 1" Essentials Oriented

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General Project Overview

Project Overview

Pre-Implementation

- Customer orientation meeting
- Getting ready guides
- Milestone planning
- Project overview meeting
- Project analysis
- Access to Sandbox
- "Getting to Know Alma" E-Learning
- 3rd party integrations readiness
- Data migration readiness

Define

- Transition to Define Phase
- Confirm project plan
- Project status calls
- Essential's training E-Learning
- Migration & Configuration inputs
- Migration Test Load
- Environment Delivery

Build

- Data Review
- Workflows& functional review
- Functional calls
- Advanced E-Learning
- Alma Workshop
- Discovery interface setup
- Go-Live Readiness Checklist
- 3rd party integrations setup
- Administration Certification
- Library Staff Training
- Cutover (Freeze and Load)

Deploy

- Go-Live
- Functional & Project Status Calls
- Switch to Support (STS) readiness
- Switch to Support

Life in Production

- 1st Year Success Program
- Knowledge Acceleration Program (KAP)
- "Dara" recommendations
- Customer Education Webinars
- Support Portal
- Release Notes & Roadmap
- Premium Services

Dedicated Project Team

Customer Support & Success teams

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Project Overview

Handoff from Sales to Project Team	Dedicated Project Team		Customer Support & Success teams

Pre-Implementation

Project Implementation 📅28

Define ✓	Build 🛠	Deploy 🚀

Life in Production ☁✓

Pre-Implementation	Project Implementation			Life in Production
Organizational Planning	Project Team Calls ↻			Alma Success Program - 1st Year post-STS and Knowledge Acceleration Program
Getting to Know Alma	Transition to Define Phase	Access to Alma Production & Primo	Migration (Cutover) & Go Live	
Data Preparation	Project Plan	Workflow & Data Review ↻		Support Portal
Access to Sandbox	Training	Alma Workshop 🏛	Go-Live Readiness Checklist ↻	Monthly Release Notes & Roadmap
Pre-Implementation Meetings	Configuration & Migration (Test)	Certification & Staff Training	Switch to Support	Customer Education Webinars
				Premium Services

🏛 Onsite   ↻ Recurring

Customer Education

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Customer Education Experience

Pre-Implementation

- **Watch** "Getting to Know Alma" online tutorials to get an introduction to Alma and learn about the major functional areas

- **Practice** using Alma in your sandbox, using the guided exercises provided in "Getting to Know Alma"

Implementation

- **Watch** Alma Essentials, Configuration tutorials, Integrations with External Systems and Extended eLearning videos

- **Work** with your Ex Libris project team to home in on site-specific questions and scenarios

- **Participate** in your institution's Alma Workshop to fine-tune your workflows

- **Become** a **certified** Alma Administrator by completing and passing the self-paced online training course and exam

Post Go-Live

First Year Focus

Participate in the Alma Success Program and attend the Knowledge Acceleration Program series of live training and Q&A sessions

Ongoing

Check out our knowledge resources, eLearning catalog, LibGuides on the Customer Knowledge Center to learn about new Alma capabilities and implementing fresh workflows

Attend regularly scheduled Customer Education webinars and our annual Knowledge Days online learning event

Review monthly 'What's New' Release Notes and videos

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Alma Implementation Training Approach

Learn
Watch the assigned recorded training videos each week (accessible via the Ex Libris Knowledge Center)

Practice
Perform exercises in your sandbox*, learn and experiment with new workflows in Alma.
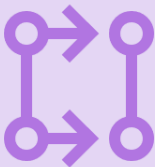
Refine
Work with your project team to refine your workflows, solidify understanding, and begin to configure Alma to work for you. **Alma Functional Workshop** typically takes place after test load is delivered

Train-the-Trainer
Start building your staff training plans early and finalize them after test load data review is complete. Utilize Alma training videos, workflows, and implementation project team expertise.

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Alma & Primo VE Environments

Training Sandbox

- Populated with generic data

- Access to Configuration is granted during training

- Used for training and testing new configuration

Production

- Implementation is done on Production

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

- Used for data review and configuration testing

- Used for Library staff training

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

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Migration Scope

Bibliographic records

Inventory (Print, Electronic)

Patrons

Fulfillment
current loans, current hold requests, current fines & fees

Course reserves

Course information
Reading lists
Citations

Acquisitions
- **Print** – vendors, funds, purchase orders, invoices (Vendors are migrated once only)
- **Electronic** – interfaces, licenses, electronic inventory enrichment (i.e. from current ERM, Serials Solutions 360 resource manager)

Authority Data
- local authorities files can be loaded using Alma standard tool (Alma Community Zone contains global authorities)

- For more information about Alma migration, read in the ExLibris Knowledge Center

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Test Load Migration

Flow

- Validate migration form with validator (Ex Libris/Customer)
- Provide final migration forms and files (Customer)
- Migration forms review session (Ex Libris)
- Provide final data extract (Ex Libris/Customer)
- Load data to Alma Production environment based on inputs (Ex Libris)
- Production Delivery (Ex Libris)
- Test Load checks: Initial Focus on data checks, before jobs are enabled (Customer)

- See more about testing migrated data: https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials#Testing_Migrated_Data

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Configuration Flow

Review recorded sessions, guide, documentation and sample form (Customer)

Configuration form partial pre population (with Migration form inputs) (Ex Libris)

Configuration form overview session (Ex Libris)

Submit draft configuration form (Customer)
Configuration form review session (Ex Libris)

Submit final configuration form (Customer)

Load configuration to Alma Production environment based on inputs (Ex Libris)

Configuration adjustments based on requests (Ex Libris)

See the Alma configuration tutorials here:
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides

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Discovery Setup – Primo VE

Training

- Review Training (Customer)
- Configuration options live session(Ex Libris)
- UI customization options live session(Ex Libris)

Configuration

- Submit configuration form (Customer)
- Primo VE initial configuration based on the input received (Ex Libris)
- Configuration review and report issues via Basecamp (Customer)

UI customization

- Using customization package (Customer)

External resources

- OAI configuration (Customer)

Environment Testing

Migrated Data	Focus initially on Data Checks, before enabling jobs in Alma (Customer) Report migration issues via Basecamp posts (Customer)
Configuration (Functionality)	Check configuration loaded from configuration form (customer) Request configuration adjustment (customer)
Go Live Readiness Checklist	Reviewed through out the project Identify areas of focus during the project

Authentication

Engage IT department (Customer)

Complete and submit the authentication form (Customer)

Authentication configuration (Customer & Ex Libris)

Authentication testing (Customer)

Authentication End to End testing after patron loader integration (Customer)
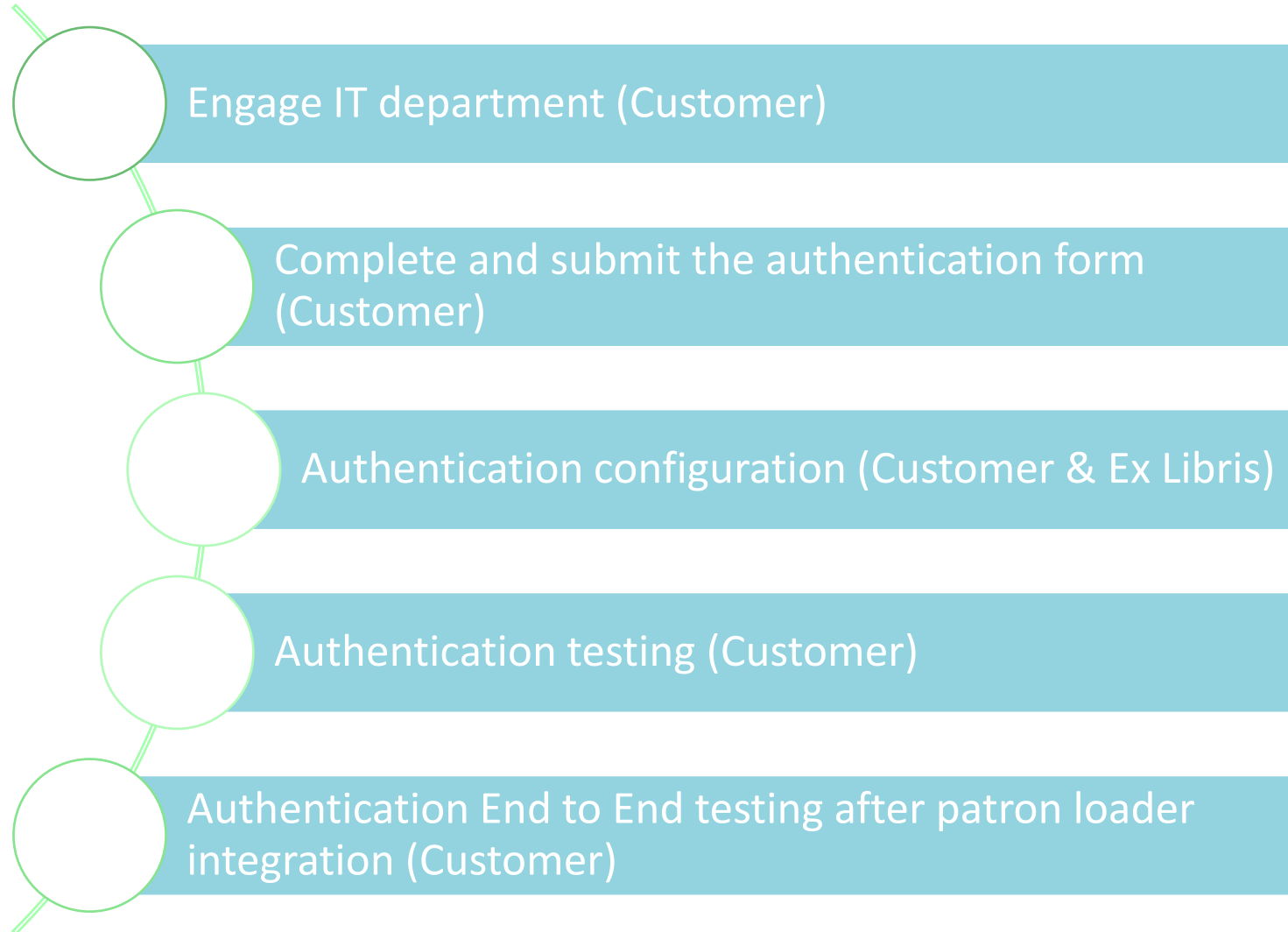
High Level Project Milestones

Transition to Define Phase → Test Load → Primo Setup → Training → Authentication/SIS Load

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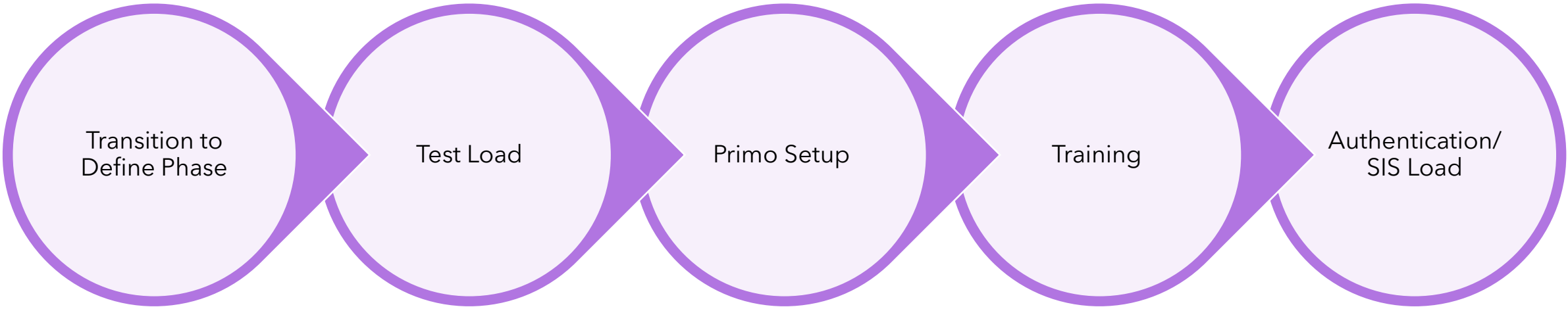
OhioLINK Project

Scope

Timeline Review

Project Meetings

Communication & Documentation

Next Steps

Project Scope

Alma Training
- Online

ILS Migration
- Migration from Sierra to Alma

URM Migration
- None

Link Resolver Migration
- 360 and EDS/FTF

Acquisitions Migration
- Yes

Functional Workshop
- In person

Premium Sandbox
- Yes

Please review and confirm

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Project High Level Milestones Dates

Milestone	Date
Transition to Define Phase	6/13/2024
Start Essential Training	6/20/2024
Test Load Start	8/4/2024
Production Delivery	9/19/2024
Authentication/SIS Load Setup	10/2024 - 2/2025
Functional Workshop	3/2025
Alma & Primo Certification	2/28/2025
Cutover Start	5/2025
Go Live	6/2025

Please review and confirm

Project Meetings

Weekly Calls

- PM to PM Calls on Wednesday @ 11:00 ET
- Leadership Team Call on Wednesday @ 3:00 ET
- Project Calls on Thursday @ 1:00 ET
- Other calls may be added on an ad-hoc basis

Project Manager/Project Management Team Lead

Ashley DeHaye   ashley.dehaye@clarivate.com

Director of Project Management

Dolph Chaney   dolph.chaney@clarivate.com

Senior Director, Service Implementation

Caroline Mason   caroline.mason@clarivate.com

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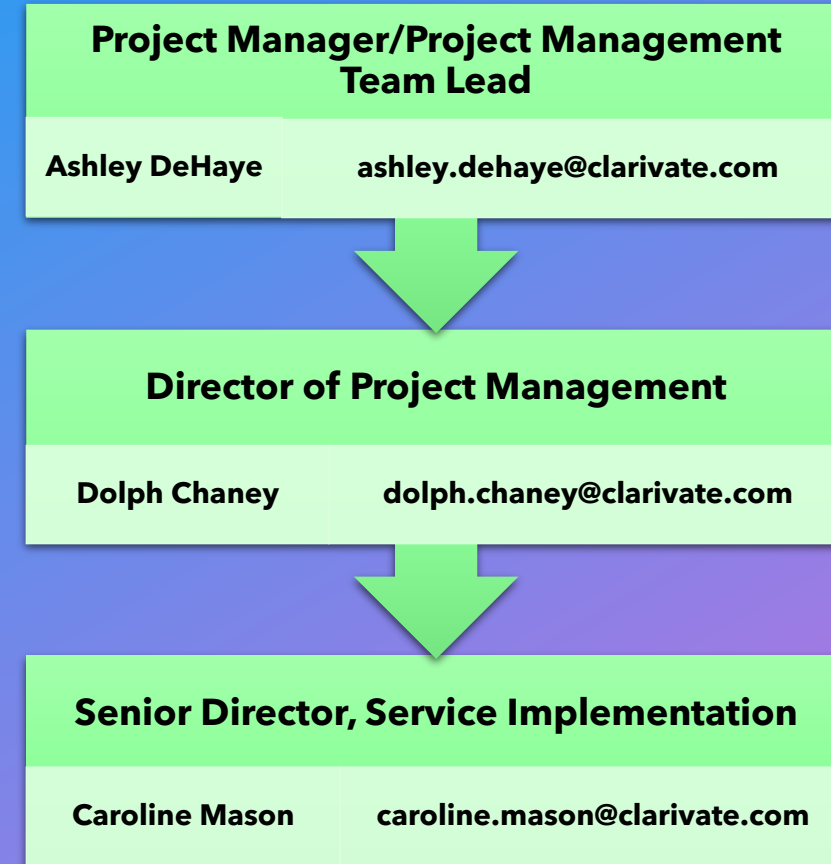
Communication

Basecamp

- Discussions, Documents, Weekly based To Dos, and Calendar

- Project-related topics

- Meeting minutes or meeting summaries

- Project plans, scheduling

- Discussions on specific topics

- Presentations, spreadsheets, and other project related documents

- Address product-related topics

  - How does x work

  - Where to find documentation about y

  - This z function is not doing what I expect

Cases

- Via Customer Support Portal – see:
  how to use the support portal

- Report data issues

- Configuration changes requests and issues

Email

- To the implementation team:
  dl-pq-ohiolink@clarivate.com

- To be used in the situation that Basecamp is not working (rare)

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Basecamps Do's and Don'ts

Do

- Engage

- Ask Questions on the Message Board

- Complete the To Do's Weekly Tasks

- Tag ALL Ex Libris team members in the message

- Provide breadcrumbs and screenshots when asking a question

Don't

- Use the Ping Feature

- Don't wait until the next meeting to ask the questions or let us know there is an issue

Documentation
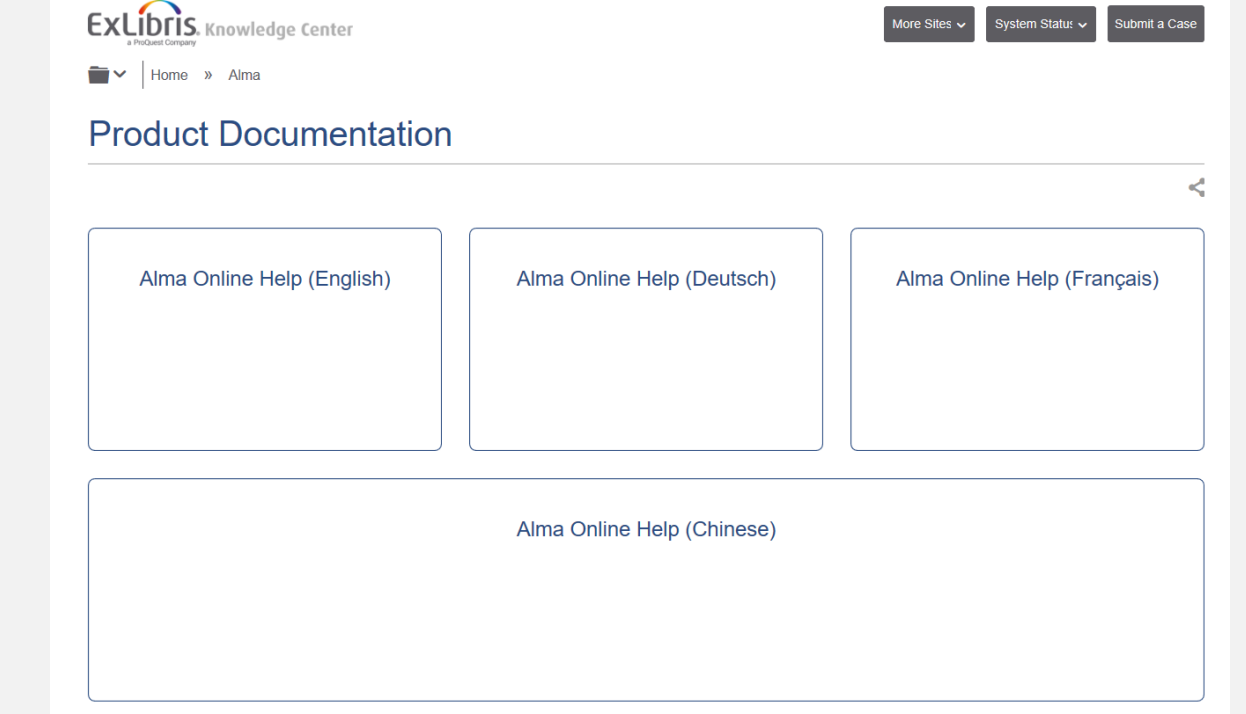
ExLibris Knowledge Center

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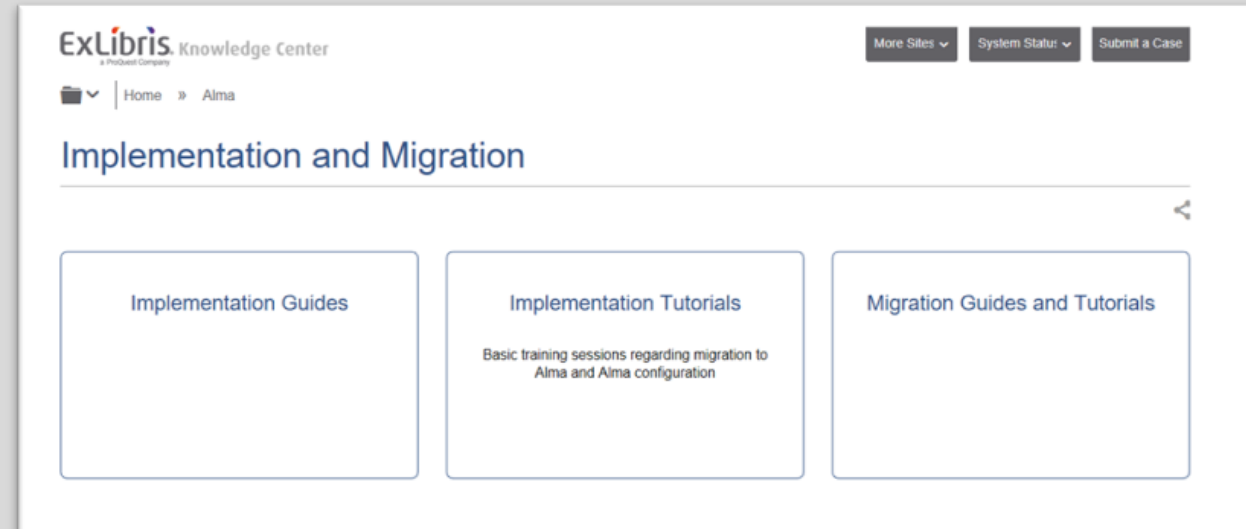
- Alma and Primo product documentation
- Alma-Primo Integration
- How-To Presentations
- Alma Online Help (OLH) – accessible via the Alma interface

Project Documentation (Guides & Instructions)

- Getting Ready for Alma Implementation
- Technical Requirements
- Migration & Configuration
- Testing Data
- Primo/Alma, and 3rd Party Integration
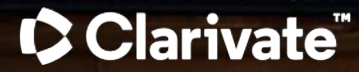
Next Steps

To Do:

Ex Libris

- Provide you the Transition to Define Phase meeting presentation
- Share project schedule in Basecamp

OhioLINK/Members

- Prepare for Configuration
- Review Configuration Form
- Subscribe to the Alma list-serv
  https://exlibrisusers.org/postorius/lists/alma.exlibrisusers.org/

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Questions?

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Thank you!

Ashley DeHaye
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