Agenda

- John
- ILS Migration – Chris Prom & Michael Norman
- Library Building Project – Tom Teper
Alma/Primo VE – Transition Process, Implementation and Timeline

Quarterly Library Update
March 5, 2020
Date for Go-Live on Alma/Primo is June 24, 2020. On that day, libraries will begin performing daily activities in both systems instead of in Voyager, SFX, VuFinds.
Updated Schedule for May and June 2020

- April 25th – BIB record bulk loads into Voyager stop
- April 25th – Library stops adding e-resource BIBs to Voyager
- May 8th – Library stops updates to SFX
- May 13th – Voyager Technical Freeze begins; Stop adding, updating, deleting BIBs, Holdings, Item records to Voyager.
- May 13th – Stop updating acquisitions and serials data in Voyager
- May 13th – Voyager and VuFind public catalogs remain available, circulation and Universal Borrowing (UB) of I-Share materials continues regularly
- May 13th – Patron updates continue
- June 11th – Stop placing Universal Borrowing (UB) requests in Voyager
- June 11th to June 18th – Continue Local UIUC Library Circulation in Voyager
- June 19th – Stop Circulation in Voyager; Start to use Alma offline circulation
- June 24th – Live on Alma and Primo Library Catalog for all use
- **Training Week(s)** -- Starting Week of May 18th to May 22nd -- Training on Alma and Primo Library Catalog
  - General session overviews of the Alma and Primo VE systems
  - Fulfillment/Circulation session(s)
  - Discovery
  - Cataloging Bibliographic Maintenance & On-The-Fly Bib session
- **Repeat** training sessions from Training week from May 25th into July 2020
- After Go-Live, in July there will be sessions for Fund Managers, E-Resources troubleshooting; August 2020 training for GAs
Alma & Primo VE
Where are we at with implementation?

- We are about 3.5 months (104 days) out from the Go-Live date of June 24, 2020 for implementing the Alma and Primo VE systems.
- We will be ready for that momentous release of working in both Alma (Backend functionality) and the Primo Library Catalog and interaction with all our user communities.
- We are continuing to configure Alma and the Primo Library Catalog to the optimum settings for the Library. Many of those setting are different for other libraries in the consortium. We are close to finalizing these setups and ready to go into production mode in a few months.
- Many individuals in the Library and at the CARLI Office are currently helping test these settings for Acquisitions, Cataloging, Fulfillment, Resource Sharing, and Discovery functionality. The ILS Coordination Team has 19 members on it and everyone has worked extremely hard over the past year to learn these new systems, inform individuals and libraries about the different setup and structure of data in Alma, help work through the configuration settings of Alma and Primo VE, plan out the training efforts that will be coming up later this Spring, and envisioning the continued internal and external communications to inform of the transition and migration to Alma/Primo.
- I want to say a big thank you to all who are putting time and effort into this configuration and testing, especially with this work being in addition to all the regular workloads we all have.
### Migration of Data from Voyager and SFX

- Vanguard Test Phase completed September 15, 2019
- Ex Libris maps Library’s catalog data and SFX electronic holdings to Alma
- Totals included (data extracted August 30 - September 3, 2019):

#### Counts of Records Migrated from Voyager/SFX

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Total Number</th>
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<tr>
<td>Number of Bibs</td>
<td>8,259,503</td>
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<tr>
<td>Number of Holdings</td>
<td>9,783,334</td>
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<tr>
<td>Number of Items</td>
<td>10,871,009</td>
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<tr>
<td>Number of Portfolios from Link Resolver</td>
<td>541,775</td>
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<tr>
<td>Number of Portfolios from ILS</td>
<td>1,354,082</td>
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<tr>
<td>Number of Packages/Databases from Link Resolver</td>
<td>787</td>
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<tr>
<td>Number of Packages/Databases from ILS</td>
<td>2,954</td>
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#### Counts of Patrons Migrated from Voyager

<table>
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<tr>
<th>Patron Type</th>
<th>Total Number</th>
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<tbody>
<tr>
<td>Number of Internal Patrons</td>
<td>43,407</td>
</tr>
<tr>
<td>Number of External Patrons</td>
<td>285,851</td>
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<td>Total Number of Patrons</td>
<td>329,258</td>
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#### Counts of Loans Migrated from Voyager

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Total Number</th>
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<tbody>
<tr>
<td>Number of Loans</td>
<td>79,096</td>
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What kind of a systems are Alma and Primo VE?

- Alma is a unified resource management system that allows libraries the ability to manage their print and electronic resources and services in a single environment.
- SaaS – Cloud-based system. Can access Alma and Primo from anywhere and 24/7.
- Can access on desktop, laptops, tablets, Alma phones apps – No more clients to install and continuously upgrade.
- Creates inventories of collections, especially for e-access.
- For an electronic title, creates electronic inventory (portfolios) that permeates Alma and associates the electronic access in Primo for all instances it can match.
- When we go to Alma, we will have a Network Zone that takes over the function of the union catalog. In Alma, the Network Zone is built using a first-in premise. That is, the first copy of a record that gets added becomes the "master record." This master record is a shared bibliographic record that will be linked to your local records in your Institution Zone. Linked institution and network zone records will be updated automatically when updates are made to either version; institution zone records may also have local fields to preserve locally-relevant bib-level data.
- Primo VE, uses the same configuration tools as Alma and also provides real-time item status information from Alma to Primo VE.
Login page to Alma

To review system status, maintenance announcements: http://status.exlibrisgroup.com/

http://go.library.illinois.edu/almasandbox
Alma Front Page after Login for MN

Welcome, NORMAN, MICHAEL | Monday, March 2, 2020

Keep Up With Alma

Introducing LibGuides for Alma

We are excited to introduce the Alma LibGuide, a new way to access training, documentation, and other resources to help you get the most out of Alma.

Find our most popular content organized by functional area, and use our content for your own LibGuides. Join our webinar on February 26th & 27th to get a quick tour.

Interested in having your Alma LibGuide featured? E-mail us at education@exlibrisgroup.com.

See more exciting new features!

Share your great ideas with us and help us improve Alma!

Notifications

2017-2018

Welcome to Alma!

Organization Calendar

Select Library/Institution

Grainger Engineering Library

March 2

Monday

00:00 - 23:59

March 3

Tuesday

00:00 - 23:59

March 4

Wednesday

00:00 - 23:59

March 5

Thursday

00:00 - 23:59

View Full Calendar

Discovery Search

Search anything...

Consortia Member Links

Select Institution:

Abraham Lincoln Presidential Library
Alma – Record Structure

Physical Records Data Structure

Bib record
Gribbin, John; Gribbin, Mary
Out of the shadow of a giant

Holdings record
Science Library

Item record
Primo Library Catalog
Primo VE – New Discovery Layer for our Online Catalog+

What is Primo VE?

- Primo VE is the new Primo deployment model that integrates the Primo backend processes and optimizes the management of Primo with Alma by utilizing the Alma platform. Primo VE is the discovery layer over Alma resources and other resources managed by the Library that need to be exposed to users.
- Primo VE is completely different from what we experienced here at UIUC Library between 2012 to 2014 when we had a pilot project.

Primo VE with the new Primo Interface

- Operational improvements and the streamlining of publishing processes
- Real-time discovery of records created in Alma
- Easier configuration and setup
- Integrated back office management of Primo VE and Alma and reduction of duplicate admin processes
- No need to constantly be re-indexing our records
- No need for publishing to Primo, as any changes to bibliographic records in Alma will show up immediately in Primo.
- New records will appear in Primo VE within 15 minutes.
- **Primo Central Index (to become the Central Discovery Index starting in February 2020)** – over 4,000 electronic collections, including all of the ProQuest collections, with nearly one billion metadata records of articles, books, book chapters, videos, audio recordings, manuscripts, datasets, etc.
Easy Search Bento – The Library’s Discovery Source

- Easy Search Bento is the Library’s primary Discovery service. We are working to incorporate Primo results into ES Bento as well.
- Easy Search Bento is the Library's search and discovery tool that allows users to search a variety of article, book, and Web sites simultaneously.
- Initiate searches from the single search box on the Library’s Front Gateway page
- Easy Search Bento will remain the default and primary discovery access point to search across multiple sources to find books, ebooks, media, articles, journals, databases, etc.
Primo Library Catalog – Example of Search

Gwendolyn Brooks

BOOK
Mickle, Mildred R.
Pasadena, Calif.: Salem Press
©2010
Located at Main Stacks: Stacks (811 17927g)
Available Online

BOOK
Shan, Harry B., 1937-
Boston: Twayne Publishers
©1980
Located at Undergraduate Library: Stacks (PS3505.R7244 1980)
Available Online

BOOK
Poetry Foundation, issuing body.
Chicago : Poetry Foundation
2017
Located at Rare Book and Manuscript Library: Stacks Non-circulating (IUB02813)

AUDIO
Brooks, Gwendolyn, 1917-2000.; Madhubuti, Haki R., 1942-
Located at Oak Street Library: Stacks Request Online (CASS 811 1796G)

BOOK
Kent, Geneviève F., 1926-
A life of Gwendolyn Brooks

Tweak your results

Sort by
Relevance

Availability
Held by library
Available online

Resource Type
Books (428)
Audio (13)
Videos (10)
Dissertations (6)
Manuscripts (3)

Show More

Library
Architecture and Art Library (1)
Center for Children's Books (7)
Communications Library (2)
History, Philosophy and Newspaper Library
Illinois History and Lincoln Collection (15)
Literatures and Languages Library (77)
Main Stacks (140)
Music and Performing Arts Library (4)
Oak Street Library (144)

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URLs for Primo Library Catalog – Live Demo Session

URL to the Primo Library Catalog:


Easy Search Bento Dev version:


Alma Login Page (No Shibboleth Single Sign On):

https://i-share-uiu.alma.exlibrisgroup.com/mng/login?mode=ajax
Library Building Project

Quarterly Library Update
March 5, 2020

Tom Teper
Associate Dean for Collections & Technical Services
Library Building: Capital Delivery Process

**Project Initiation Phase**
- Mission statement
- Master planning
- Feasibility study
- Strategic planning

**Product:**
- Master Plan
- Feasibility Plan

**Project Planning Phase**
- Project team
- Project scheduling
- Project visioning
- Programming
- Conceptualization
- Project budgeting

**Product:**
- Facilities Program
- Conceptual Design, Budget & Schedule

**Project Design Phase**
- Schematic design
- Design development
- Construction documents
- Budgeting
- Bidding & award

**Product:**
- Final construction documents, budget & schedule

**Project Construction Phase**
- Mobilization
- Project construction
- Equipment delivery
- Commissioning
- Inspections
- Occupancy planning

**Product:**
- Completed facility
- Certificate of occupancy

**Project Post Construction Phase**
- Staff orientation
- Furniture fixture & equipment installation
- Moving
- Occupancy
- Warranty

**Product:**
- Functioning facility
Library Building: Current Status

• Conceptual Design Phase is, effectively, complete.
  – Drawings for the Main Library and Undergraduate Building Submitted
  – Library Consultation Working Group (LCWG) submitted report to Provost

• Next Steps (for building):
  – Campus Planning/Programming
  – Campus Project Approval
  – Architect/Engineer (A/E) Selection

• Next Steps (internally):
  – Shifting Focus to Communications, Outreach, Assessment, and Preparation

• Next Steps (Collaborative):
  – Pursuing discussions about additional storage capacity on campus....
Library Building: Project Schedule

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<th>Project Stage</th>
<th>2020</th>
<th>2021</th>
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<td>Sep</td>
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<td>Phase IV - Undergraduate Library Plaza/In-fill</td>
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