



The ULMS
Vanguard
Experience



Agenda

- Vanguard Campuses
- Managing Deliverables
 - Basecamp, Ex Libris Resources, and Forms
 - Deadlines and Time Management
 - Staff
- Overview of Forms
 - The Migration Form
 - The Field Mapping Form
 - P2E
- Extracting Data from Millennium
 - Documentation
 - Acquisitions Data
 - Tips
- The Acquisitions Fund File
- Data Cleanup Decisions

Where to Go

Resource	Used For
Basecamp	Posting questions / Discussion forums with Ex Libris staff Sharing documents / links to documents Posting deadlines and reminders
Ex Libris Knowledge Center <i>knowledge.exlibrisgroup.com</i>	Documentation and Training Videos Downloading Forms
Salesforce	Submitting Forms and Managing problems /tickets
CSU Project Managers Listserv - <i>ulms-pm@lists.calstate.edu</i>	Informal questions/discussions Sharing issues

Using Basecamp

- Spend some time getting familiar with Basecamp - even if you've used it before. Ex Libris has a [Basecamp Tour](#) online.
- Used for discussion threads, document sharing, and managing dates
- This is the main venue for questions to Ex Libris
- Use the calendar to help remember deadlines
- The To-Do list has links to webinars and training materials you're expected to watch



01CAL (CALSTATE) Alma/Primo Implementation

[Invite more people](#)

[Catch up](#)

52 people on this project

on recent changes

[87 Discussions](#) [24 To-dos](#) [46 Files](#) [6 Text documents](#) [Events](#)

Latest project updates

- Feb 22** Lauren M. posted a message: [Holding records from summ stmt in Bib](#)
- Feb 22** Brandon D. commented on [Configuration Form - Defining Hours](#)
- Feb 21** Audrey H. changed a to-do list title from 'PRIMO (Delivery)' to 'PRIMO (Delivery) -Vanguard phase': [PRIMO \(Delivery\) -Vanguard phase](#)

[See all updates](#)

Upcoming Events

February 24

- [CALSTATE weekly project call](#)

March 2

- [CALSTATE weekly project call](#)

[All upcoming events...](#)

Discussions



[Watch a quick video about Discussions](#)

- Lauren M. [Holding records from summ stmt in Bib](#) - In the next load, Northridge would like to submit a Holding record from summ stmt in Bib file. I have a couple of Feb 22
- Brandon D. [Configuration Form - Defining Hours](#) - Svetlana - Revisiting this question since I don't think we got a clear sense of how to handle the situation where a Feb 22 17
- Renaldo G. [Difficulty testing 3rd party integration with...](#) - Thank you, Svetlana. I have tested the 3m self-check integration with Alma successfully. Feb 19 5
- Svetlana S. [Records that do not match the master record...](#) - Case 00204219 has been opened to discuss NZ data migration approach with migration team. Feb 19 1
- Sarina S. [Suppressed items](#) - Hi Megan, That's good to know, thank you for the explanation and recommendation. Sarina Feb 19 2

[74 open discussions](#) • [12 archived discussions](#)

Calendars

[+ Add a calendar](#)**Add your first calendar**

Keep track of events that aren't part of a project.

Projects

[01CAL \(CALSTATE\)](#)
[Alma/Primo Implementation](#)

[Subscribe to iCal](#)[← Hide the calendar list](#)

March 2016

[Today](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	March 1	2	3	4	5
			CALSTATE weekly project ... 1 To-do <input type="checkbox"/> SUBMISSION MILESTONE: Consortium-specific workbook 2...			
6	7	8	9	10	11	12
			CALSTATE weekly project ... 2 To-dos <input type="checkbox"/> Primo configuration applied <input type="checkbox"/> Primo Back Office access opened...			
13	14	15	16	17	18	19
			CALSTATE weekly project ... Complete all vanguard da... 2 To-dos <input type="checkbox"/> Watch Migration Trainings (see comment... <input type="checkbox"/> Download latest copy of migration...			
20	21	22	23	24	25	26
	1 To-do <input type="checkbox"/> Attend Migration form review session		CALSTATE weekly project ... 1 To-do <input type="checkbox"/> Migration form open Q&A (will...			
27	28	29	30	31		
			CALSTATE weekly project ... 1 To-do <input type="checkbox"/> Submit: Draft Migration form. Field...			

Project: 01CAL (CALSTATE) Alma/Primo Implementation
 List: Alma Test Load Delivery (March 16 to June 3 2016)

Download latest copy of migration form and related guides (see comment for link) [1 comment](#)

Time Management

- Start immediately. Do not wait on EL training webinars.
- Use Basecamp calendar, timelines and to-do lists
- Schedule regular meetings with your campus Implementation Team
- Deadlines for deliverables are not flexible
- Multiple people will be working on multiple parts of this project

Test Load Deliverables - March

March 2	Vanguard-led walkthrough of migration forms via webinar
March 9	Vanguard-led Q&A session regarding migration forms via webinar
Wed, Mar 16	Watch Migration Trainings available on Ex Libris website
Wed, Mar 16	Download latest copy of migration form and related
Mon-Tue Mar 21-22	Ex Libris kickoff meeting@Fresno State
Wed, Mar 23	Attend Ex Libris Migration form review session via webinar
Wed, Mar 30	Submit Draft Migration form, Field Mapping form, and draft P2E (print to electronic) form; Ex Libris project team to review

Test Load Deliverables - April

Wed, Apr 13	Finalize Migration inputs (migration form, field mapping form, p2e)
Fri, Apr 15	Submit Full data extracts (incl. ERM data if applicable), delivered files list to FTP server
Wed, Apr 20	Ex Libris loading test migration data into Alma begins
Mon, Apr 18	Send Alma configuration form to all CSU campuses
Mon, Apr 18	Download latest copy of Alma Configuration Populator form
Mon, Apr 25	Watch Ex Libris online Configuration Trainings
Wed, Apr 27	Attend Alma configuration review session via webinar

Test Load Deliverables - May/June

Wed, May 11	Submit Draft Alma configuration form; Ex Libris project team to review
Fri, May 20	Test loads delivered on implementation server for checks by Ex Libris project team
Wed, May 25	Finalize Alma configuration form
Wed, May 25	Test loads - copied to production (Ex Libris migration team)
Wed, May 25	Apply Alma configuration settings to each institution (Ex Libris project team)
Fri, June 3	Alma test load environments released to CSU campuses

Staffing

- Use your local ULMS Implementation Team
 - Who to include (at minimum):
 - Acquisitions Expert
 - Electronic Resources Expert
 - Fulfillment (Circulation / Access Services) Expert
 - Cataloging Expert
 - Systems/ILS Expert
 - Discovery System Expert (Primo)

Deliverables: Forms

Form Name	Description
Delivered Files List	List of all the filenames and sizes you've created from extracted ILS data (e.g., patron files, bib files, etc.)
Field Mapping Form	Helps Ex Libris map source ILS local fields to Alma (e.g., what is the name of the field where you store the date an item was last checked out (LOUTDATE)?
Migration Form	Helps Ex Libris determine what meaning the field values in your records should have in Alma (e.g., what field values mean "suppression"?)
Configuration Form	Sets up default configuration for functional configuration, such as loan rules , in Alma.
3rd Party Integration Form	A tracking form for integrations you want to set up (e.g., PDA, EDI, Bursar Systems, etc.). Ex Libris won't automatically set up integrations for you. This form is only for tracking purposes.

Field Mapping Form

Description	Helps Ex Libris map source ILS local fields to Alma (e.g., what is the name of the field where you store the date an item was last checked out (LOUTDATE)?
How Long it Takes to Complete	1 week
Who Needs to be Involved	ILS/Systems, Cataloging, Fulfillment, Acquisitions Experts.
Pay Special Attention To	OCLC Numbers: If the OCLC numbers in the bib records are not in the 035, they will be moved to the 035 as part of the migration to Alma, but it must be accompanied by the control number identifier -- (OCoLC). Call Numbers: If you choose call numbers from bibs, can be time consuming and complex if you have a variety of call number types (accession numbers, SuDocs, etc.)
Key Decisions	Since not all fields from the legacy ILS are mapped to comparable fields in Alma, you have to decide which fields will end up in Note Fields in Alma. Where you want holdings call numbers to be generated from (bib or item?)

Migration Form

Description	Helps Ex Libris determine what meaning the field values in your records should have in Alma (e.g., what field values mean “suppression”?)
How Long it Takes to Complete	2 weeks
Who Needs to be Involved	ILS/Systems, Cataloging, Fulfillment, Acquisitions Experts.
Pay Special Attention To	The Locations tab. This tab has a column that determines which locations have electronic materials in them. Double-check this column for accuracy.
Key Decisions	<ul style="list-style-type: none">● How many Libraries to define<ul style="list-style-type: none">○ Libraries typically refer to separate buildings, but you may need to define libraries for unique service locations, particularly if service locations have different operating hours● Whether and how to simplify loan rules and other codes (item types, patron types, locations, status codes, etc.)

P2E: Print to Electronic

Description	<p>A .csv file with two columns: 1 column of bib numbers for MARC records that represent electronic resources; corresponding column that indicates whether the record is a portfolio, package, or database. A portfolio has the same meaning it does in SFX: a link to a single electronic resource, such as a journal, video, ebook, etc. Packages/databases discussed on next slide.</p>
How Long it Takes to Complete	2 weeks
Who Needs to be Involved	Electronic Resources Expert
Pay Special Attention To	<p>Removing any resources that are not actually electronic resources from the list. For example, records that only have links for related or associated information should not be included. You also don't need to include any bib records for electronic resources that are active in SFX, unless you have attached order information you want to retain.</p>
Key Decisions	<ul style="list-style-type: none">• Whether to include packages/databases, or which packages/databases to include• How to extract / determine which records need to be on the P2E list. The example shown as part of this presentation may not work for you, depending upon how your electronic resources are set up in your ILS.

P2E: What does it do?

For each bib record # entry, an **electronic portfolio** is created where digital access is managed.

1 [Digital atlas of the United States William A Bowen. \[electronic resource\] /](#)

Online: getFullText

[Edit](#) | [View](#) | [Deactivate](#) | [Order](#) | [Link to community](#) | [Create E-Activation Task](#) | [Test access](#) | [Delete](#) | [Report To Ex Libris](#) | [More info](#)

The screenshot displays the 'Electronic Portfolio Editor' interface. At the top, it shows the resource description: 'Digital atlas of the United States Bowen, William A., 1941- California Geographical Survey Dept of Geography California State University Northridge Northridge, Calif. : [1997?]'. Below this, there are fields for 'Interface Name' (set to '-') and 'Service type' (set to 'Full Text'). A navigation bar contains tabs for 'Portfolio Information', 'Linking Information', 'Coverage Information', 'Notes', and 'History'. The 'Linking Information' tab is active, showing a 'Uri' field with the value 'http://130.166.124.2/USpage1.html'. Below the URI, there are radio buttons for 'URL Type', with 'Static URL' selected. A 'Static URL' input field is present but empty. At the bottom, there are radio buttons for 'Proxy enabled', with 'No' selected, and a 'Proxy selected' input field. A 'Test access' button is located in the bottom left corner.

P2E: “Single Record Approach” Records

Electronic portfolios are created for “**single record approach**” records, where print items and electronic access are associated with a single bibliographic record.

Print items and holdings are retained (linked to the bibliographic record) and the electronic portfolio is created and also linked to the same bibliographic record.

P2E: "Single Record Approach" Records

Book

☆ Parametric study of finite element displacement : typical solutions to the thesis "stresses around sharp-cornered rectangular central hole or crack in rectangular flat isotropic supported plate in bending under uniform normal pressure" by an 'orthogonal method' which has been proven not to converge to a practical mathematical general solution
Henry Joseph De Barro 1984

● Online access. The library also has physical copies.

View It **Get It** Details Virtual Browse

California State University, Northridge Sign-in for more options

Request Options:

Location Oviatt Library Stored Special Collections and Archives TA153 .Z95 1984 D42 Hide D

Availability: (1 copy, 1 available, 0 requests)

1 - 1 of 1 Records

Barcode	Type	Policy	Description
30700109549377	Book	Loanable	

Electronic portfolio access on the **View It** tab

Print Item Information on the **Get It** tab

P2E: Package or Database? (it doesn't matter)

Standalone portfolios migrate without relationship to packages or databases.

*Packages and databases are very similar and become electronic collections in Alma with one difference in the inventory type. **There is no functional differences.** You may 'mark' them differently for administrative or resource management purposes.*

You may decide to migrate electronic collections (packages/databases) if you have linked orders to them and want to keep it or you plan to link standalone portfolios to a collection after migration.

P2E: Package or Database? (it doesn't matter)

Bottom Line: If you have MARC records for databases (like Academic Search Premier) don't agonize about the distinction between packages or databases. They' ll all become electronic collections.

If you don't care about linked orders for these records, you can choose not to migrate these records at all and exclude them from your bib extract altogether.

Extracting Data from Millennium / Sierra

- Indispensable documentation serves as guide
- Acquisitions Data - Order types, status, payment history
- Tips and more

Acquisitions Fund File

LEDGER CODE	LEDGER NAME	SUMMARY FUND	SUMMARY FUND NAME	FUND CODE	FUND NAME
SJSU	SJSU Library	APPR	Approvals	510a	In House Tools - Approval
SJSU	SJSU Library	APPR	Approvals	513a	Bibliographic Tools - Approval
SJSU	SJSU Library	APPR	Approvals	560a	Multicultural Coll - Approval
SJSU	SJSU Library	APPR	Approvals	565a	ADA Materials - Approval
SJSU	SJSU Library	APPR	Approvals	600a	Africana Center - Approval
SJSU	SJSU Library	APPR	Approvals	610a	Asian American Ctr - Approval
SJSU	SJSU Library	APPR	Approvals	620a	Chicano Center - Approval
SJSU	SJSU Library	APPRTRST	Approval-Trust	723a	Winters Fund - Approval Trust
SJSU	SJSU Library	DBCO	Database CO	511ce	Multi Subject - Database CO
SJSU	SJSU Library	DB	Database	511ee	Multi Subject - Database
SJSU	SJSU Library	DBCO	Database CO	570ce	Applied Arts & Sci - Database CO
SJSU	SJSU Library	DB	Database	570ee	Applied Arts & Sci - Database
SJSU	SJSU Library	DBCO	Database CO	571ce	Business - Database CO
SJSU	SJSU Library	DB	Database	571ee	Business - Database
SJSU	SJSU Library	DBCO	Database CO	572ce	Education - Database CO
SJSU	SJSU Library	DB	Database	572ee	Education - Database
SJSU	SJSU Library	DBCO	Database CO	573ce	Engineering - Database CO
SJSU	SJSU Library	DB	Database	573ee	Engineering - Database
SJSU	SJSU Library	DBCO	Database CO	574ce	Humanities- Database CO
SJSU	SJSU Library	DB	Database	574ee	Humanities- Database

Deliverables: Data Extraction

Deliverable	Format	Description
Bibliographic Records	.mrc	MARC extracts of all bibs with a 245, not withdrawn; 150,000 records per file
Suppressed Bibs	.csv	List of bib record numbers of suppressed records
Items	.csv	Export ITEM records according to instructions in the Data Delivery Instructions document.
Item Secondary File	.csv	Enumeration and Chronology for item records in III. If this file is not submitted, all enumeration and chronology will be placed in a description field (you don't want this)
MARC Holdings Records	.mrc	Submit if you have MARC Format for Holdings Data (MFHD) set up in your system.
Checkin Records	.csv	Submit if you don't have MFHD set up in your system and want HOLDINGS in Alma generated from checkin records.
Holding Records from Summ Statement in Bib	.csv	Will be used to generate an 866 Summary Statement in HOLDINGS records in Alma. Submit if you do not have LIB HAS summary stmt in checkin records.

Deliverables: Data Extraction (cont.)

File Type	Format	Description
Patrons	.csv	Export PATRON records according to instructions in the Data Delivery Instructions document.
Loans	.csv	Export LOAN according to instructions in the Data Delivery Instructions document.
Requests	.csv	Export REQUESTS according to instructions in the Data Delivery Instructions document.
P2E	.csv	Bib record numbers for electronic resources. See later discussion.

Deliverables: Data Extraction (cont.)

Only if you are migrating acquisitions data:		
Vendors	.CSV	Export VENDOR records according to instructions in the Data Delivery Instructions document.
Funds	.CSV	FUNDS not exported from Millennium. See sample FUNDS file in later screen
Open Orders	.CSV	Export ORDERS according to instructions in the Data Delivery Instructions document.
Order Payments	.CSV	Export ORDER PAYMENTS according to instructions in the Data Delivery Instructions document.
Only if you are migrating course reserves:		
Courses	.CSV	Export COURSES records according to instructions in the Data Delivery Instructions document.

Sample list of extracted files (Delivered Files List)

10	Bibliographic records (MARC)	Yes	CSUFRESNO_bibs_a_20151117.mrc, CSUFRESNO_bibs_b_20151117.mrc, CSUFRESNO_bibs_c_20151117.mrc, CSUFRESNO_bibs_d_20151117.mrc, CSUFRESNO_bibs_e_20151117.mrc, CSUFRESNO_bibs_f_20151117.mrc, CSUFRESNO_bibs_g_20151117.mrc, CSUFRESNO_bibs_h_20151117.mrc, CSUFRESNO_bibs_i_20151117.mrc, CSUFRESNO_bibs_j_20151117.mrc, CSUFRESNO_bibs_k_20151117.mrc, CSUFRESNO_bibs_l_20151117.mrc, CSUFRESNO_bibs_m_20151117.mrc, CSUFRESNO_bibs_n_20151117.mrc, CSUFRESNO_bibs_o_20151117.mrc	150,000	UTF-8	15 files; last one = 60,404; total records = 2,160,404
11	Suppressed bibs	Yes	CSUFRESNO_suppressedbibs_20151117.csv	63,618	Latin-1	
12	Items	Yes	CSUFRESNO_items_a_20151117.csv,	140,000	Latin-1	10 files; last file = 144,150; total records = 1,404,160
13	Item secondary file (Enum/Chron)	No			Latin-1	
14	MARC holding records	No			Latin-1	
15	Checkin (non-MARC holdings)	Yes	CSUFRESNO_holdings_20151117.csv	8,007	Latin-1	
16	Holding records from summ stmt in Bib	No			UTF-8	
17	Patrons	Yes	CSUFRESNO_patrons_20151117.csv	36,911	Latin-1	
18	Loans	Yes	CSUFRESNO_loans_20151117.csv	12,122	Latin-1	
19	Requests	Yes	CSUFRESNO_requests_20151117.csv	10	Latin-1	
20	Vendors	Yes	CSUFRESNO_vendors_a_20151117.csv, CSUFRESNO_vendors_b_20151117.csv	821	Latin-1	
21	Funds	Yes	CSUFRESNO_funds_20151117.xlsx		Latin-1	
22	Open Orders	Yes	CSUFRESNO_orders_a_20151117.csv, CSUFRESNO_orders_b_20151117.csv	24,219	Latin-1	
23	Order Payments	Yes	CSUFRESNO_orders_c_20151117.csv		Latin-1	
24	Courses	Yes	CSUFRESNO_courses_20151117.csv	347	Latin-1	
25	P2E	Yes	CSUFRESNO_p2e_20151117.csv	1,099,100	Latin-1	

Data Cleanup Decisions

- Reclamation project-- doing one may be helpful (Linking problems to NZ)
- Setting multiple libraries for desks that have totally different hours/policies, etc. (even if those desks are inside your main library, e.g., for equipment loans)
- Decide what fields will be marked as LOCAL that you will want to retain in your IZ records
- Migrate local fields from 900-949 to 95x+ (see [Technical Services Working Group standards](#))
- Remove unnecessary patron types, item types, item statuses, patron block types, locations and simplify loan rules as much as possible
- Identify any records that have OCLC #s that are used for totally local purposes that you do NOT want in the NZ. Example: Northridge had used some OCLC Records to create “cover cards” which were used for the purposes of Serials checkin. We stripped OCLC #s from these records.

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Feel free to email or call us with questions

Visit the Project Wiki -- Often

Test Phase

- [Documentation and Online Training](#)
- [Extracting records](#)
- [To-Dos for Test Phase](#)
- [Questions and Answers from Vanguard Phase](#)