WHAT TO DO THE WEEK BEFORE GO LIVE TUESDAY

Monday (8 days before go-live)

* ExL Alma team will deliver your cutover data on production and send migration statistics.
* ExL Primo team will have deleted all test load data from Primo and will begin publishing the cutover data to Primo.
* Campus begins checking data and reports all questions/problems through Salesforce.
* Do not delete, change or add anything in Alma until migrated data is accepted.

Tuesday and Wednesday

* Campus continues to check data and reports all questions/problems through Salesforce.
* Do not delete, change or add anything in Alma until migrated data is accepted.
* As soon as you have finished checking the migrated data in Alma, send Ex Libris and the CO your written notification of acceptance. Basecamp messages or e-mails are both acceptable.
  + If everything is good, say so!
  + If there are data issues that need to be resolved urgently, log a Salesforce case for each one, at High priority, and send a list of those cases with your notification (conditional acceptance).
  + Notification can be as formal or informal as you want – as long as it’s in writing!
* Once you have notified us of acceptance, you may begin work in Alma EXCEPT in Fulfillment / Circulation areas (users, loans, fines/fees, and requests will all be deleted and re-migrated on Sunday).

Wednesday (after acceptance), Thursday, Friday, and (if desired) Saturday

* Continue any non-fulfillment prep work in Alma that you wish to perform.
  + Suggestions –
    - Double-check authentication configuration
    - add any changes made to Staff roles (not Public)
    - Confirm location names and external location names
    - Begin your highest-priority data cleanup tasks.
    - Load usage data reports.
* Send notification on Basecamp when you have extracted your circ data and frozen circulation in your prior ILS, uploaded the circ data to FTP, and started using Alma Offline Circulation. Also, tell us whether you plan to load your own offline circ files or would like us to do so for you.
  + You must freeze circ and start Alma Offline Circ by end of day Saturday, so that we can begin fulfillment cutover on time in the Sunday morning maintenance window.

Sunday

* Do not log into Alma until we deliver your fulfillment cutover.

Monday

* Once we have delivered your fulfillment cutover, log in to check and make sure the fulfillment data is correct. This should take less time than the full check because it only includes the following areas.
  + Users
  + Loans
  + Fines/fees
  + Requests
* We expect that Primo publishing should be complete; we will notify you when it is.
* By end of day:
  + Send written notification (Basecamp or e-mail) that you accept the fulfillment data.
  + Either load your offline circ files or, if you request, tell us that you are ready for us to load them for you.
  + Send written notification (Basecamp or e-mail) that you accept Primo with Alma.
* Overnight:
  + If all acceptances have been sent, ExL will run “go-live process.”
    - Job schedule is enabled.
    - User e-mail addresses are unscrubbed.
    - FTP and e-mail include lists are cleared, so that all FTP and e-mail traffic can run.

Tuesday

* ExL will confirm that “go-live process” has been run and let you know you can go live at any time.
* “What does it mean to go live?”
  + You have circulated your first book to a real patron.
  + You have created your first purchase order.
  + You have added your first record to the catalog.
  + Your Primo is live on your library website for users to access.
* Send notification that you have gone live – and CELEBRATE!