**20170420 Alma functional call chat transcript**

from Christina S (CSUCI) to everyone:

is it super quiet or is my audio dead?

from Moon Kim to everyone:

I think it's quiet?

from Christina S (CSUCI) to everyone:

lol my audio seems to be dead and then alive

from Sacramento State to everyone:

Christina did you hear Dolph?

from Christina S (CSUCI) to everyone:

nope

from Dolph Chaney to everyone:

I am speaking right now

from Mark B (Los Angeles) to everyone:

I hear you clearly

from Dolph Chaney to everyone:

Hopefully you can hear me.

from Dolph Chaney to everyone:

If not, please try reconnecting.

from Christina S (CSUCI) to everyone:

yes thx

from Mark B (Los Angeles) to everyone:

Current technology... signals don't make it across the Rockies

from Christina S (CSUCI) to everyone:

:)

from Christina S (CSUCI) to everyone:

thx dolph :)

from Natasha Allen (SJSU) to everyone:

can anyone put the link in the chat?

from Natasha Allen (SJSU) to everyone:

never mind found it!

from Megan Drake to everyone:

https://knowledge.exlibrisgroup.com/Alma/Implementation\_and\_Migration/Implementation\_Guides/01Alma\_and\_Primo\_Cutover\_Process

from Christina S (CSUCI) to everyone:

where can we find the sandbox urls?

from Christina S (CSUCI) to everyone:

(remind me)

from Brandon to everyone:

Sandbox NZ https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01CALS\_NETWORK

Sandbox Member 1 https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01CALS\_UFR

Sandbox Member 2 https://sandbox01-na.alma.exlibrisgroup.com/mng/login?institute=01CALS\_SJO

from Eva Sorrell to everyone:

Do we need to worry about filling out the names column or is it okay to just make the codes match?

from Laura (Sonoma) to everyone:

Thank you for that clarification Megan.

from Eva Sorrell to everyone:

If we changed a location name on the migration form, would it change the name in Alma?

from mark to everyone:

Does the same apply to item types? I've changed them all on production any they divery radically from my Sierra / Millenium type

from Christina S (CSUCI) to everyone:

i assume this is going to our PMs?

from Christina S (CSUCI) to everyone:

thx

from Christina S (CSUCI) to everyone:

but not sent yet correct?

from Chico (privately):

How/when do they get turned on if we don't turn them on now. We do it on our own later?

from Christina S (CSUCI) to everyone:

lol yes virginia there is a santa claus

from TeamSDSU to everyone:

Please pass link in chat, Thanks

from Dolph Chaney to everyone:

https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Administration/070Managing\_Jobs/030Viewing\_Scheduled\_Jobs

from Dolph Chaney to everyone:

https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Fulfillment/070Advanced\_Tools/060Offline\_Circulation

from Laura (Sonoma) to everyone:

When you say "It would work," what specifically would work (for putting in the patron's name instead of an identifier)?

from Megan Drake to everyone:

It doesn't load into Alma, though, and you have to manually recreate the circulation. So don't let people enter names. it's a BAD idea

from Julie Kowalewski Ward to everyone:

How are new users that we are giving privileges to handled? Create patrons in Alma befoe uploading offline circ?

from Megan Drake to everyone:

Thanks, Dolph. ;)

from Megan Drake to everyone:

Jule - you can't create patrons in Alma at this time because patrons are being reloaded

from Julie Kowalewski Ward to everyone:

So we would create the patron after we go live and then load offline circ?

from Thoreau (SF) (privately):

What loan period is assigned to these loans? Where is that determined?

from Humboldt State to everyone:

If we put in the primary ID number, the loans will upload?

from Megan Drake to everyone:

Yes but you'll need to make sure that the primary identifier of the patron matches. If you run the SIS load before the offline circ file, it should be good provided that user is in the SIS file

from Laura (Sonoma) to everyone:

Does it continue to save to a single file, or does it generate a new file everytime you click "Save to File"?

from Eva Sorrell to everyone:

Would that extra space at the beginning of your 2nd barcode cause a problem?

from Thoreau (SF) (privately):

But at the time of the off-line transaction, how long does the patron get the item for?

from Megan Drake to everyone:

@Laura - it continues to save to a single file

from Laura (Sonoma) to everyone:

Thanks.

from Humboldt State to everyone:

would one computer for loans and one for returns be a good idea?

from Mark B. (Los Angeles) (privately):

Good point about a Single Offline Station--I encountered this sort of issue with Mill Offline Circ

from Mark B. (Los Angeles) (privately):

One station.

from Humboldt State to everyone:

would this be a thing to use for browse/reshelving circ?

from Mark B. (Los Angeles) to everyone:

Good point about a Single Offline Station--I encountered this sort of issue with Mill Offline Circ

One station.

from Megan Drake to everyone:

Humboldt - no. I wouldn't use this for in house use

from Megan Drake to everyone:

this is for pure checkouts / returns to patrons only

from Laura (Sonoma) to everyone:

I've encounted it with Mill offline circ, too. Definitely use only ONE computer for processing loans and returns.

from Matthew Prutsman to everyone:

also, you can possibly leave checking-in most items until you are live in Alma

from Megan Drake to everyone:

Yep - I learned all of this from (painful) personal experience at Pacific University. :)

from Carole @ SJSU to everyone:

We appreciate your pain, Megan. Your pain is our gain. ;-)

from Laura (Sonoma) to everyone:

The transactions in offline circ don't look like they are date stamped at all, so essentially any overdues for reserve items or anything with a short loan period just doesn't happen while you're in offline circ right?

from Mark B. (Los Angeles) to everyone:

Dolph The Brave dives into an Unrehearsed Live Demonstration...congratulations.

from CSUN to everyone:

does the .dat file contain the patron identifier?

from TeamSDSU to everyone:

Where's patron ID?

from Humboldt State to everyone:

can we enter the primary ID instead of patron barcode?

from Humboldt State to everyone:

yay

from Christina S (CSUCI) to everyone:

awesome, dolph!! :) i love day by day plans

from Christina S (CSUCI) to everyone:

brandon's thing was v helpful too

from Christina S (CSUCI) to everyone:

i assume this day by day plan is going to PMs as welll?

from Christina S (CSUCI) to everyone:

ah thx

from Chico (privately):

Will we be receiving these notes?

from Chico (privately):

Ha. Never mind!

from Christina S (CSUCI) to everyone:

nagging = good

from Christina S (CSUCI) to everyone:

online late = scary

from Cal Poly SLO to everyone:

Can we start entering our Reserves data during this time?

from Chico to everyone:

We missed something... so Fulfillment will need to be frozen for a week from the time we send data to the Sunday after acceptence?

from Cal Poly SLO to everyone:

thanks

from Laura (Sonoma) to everyone:

So Saturday after we freeze circ is when we'll do our circ data exports?

from Christina S (CSUCI) to everyone:

seems like some folks might have to work week-ends, assuming library is open over this week-end

from Christina S (CSUCI) to everyone:

i mean who normally don't

from Christina S (CSUCI) to everyone:

one week-end i should say

from Laura (Sonoma) to everyone:

The cutover schedule shows "verify Primo with full clean data re-published" on Sunday before go live. Can I update that to Monday? :-)

from Laura (Sonoma) to everyone:

It's in the cutover plan, not the cribsheet.

from Christina S (CSUCI) to everyone:

this is a beautiful doc

from Christina S (CSUCI) to everyone:

i'm crying... on the inside

from Christina S (CSUCI) to everyone:

something occurred to me

from Laura (Sonoma) to everyone:

And then brace yourself for everyone in the library having questions for you if you are the only person in your library who has been managing the migration. :-)

from Christina S (CSUCI) to everyone:

when you refer to eob you mean OUR eob, not exl eob correct?

from Christina S (CSUCI) to everyone:

are you truely going to be up at all hours dolph?

from Mark B. (Los Angeles) to everyone:

Thank you for working patiently (Dolph and all ExL folk) to help us reach this point.

from Pam to everyone:

I'm assuming Analytics will be unavailable at some point? Our data in Analytics will also be cleared?

from Pam to everyone:

Okay, thanks! That helps.

from CSUN 2 to everyone:

That's good to hear. I thought we were told previously that only reports in community folders would stay

from Mark B. (Los Angeles) to everyone:

Analyses and Reports will remain (like location, libraries etc.)

from chris ashley (privately):

For San Marcos - I assume that all of our Alma sets and MD Editor NRs and processes will be moved over, is this correct?

from CSUN to everyone:

From our test Alma to the go-live Alma, will saved rules carry over (merge, normalization, and indication) in CSUN's IZ as well as the NZ rules? Should I back them up just in case?

Will import profiles carry over as well?

from chris ashley to everyone:

San Marcos is using MMS IDs in host bib records - are you saying that these will change so none of our host bib linking will work? I thought that our sets would be saved. Is San Marcos and Sac State differnt in that our sets will be saved or no?

from chris ashley to everyone:

whew!

from Samuelito (privately):

Dolph, just giving a friendly 'bump' to CSUN's question in the Chat - thanks! from CSUN to everyone:

From our test Alma to the go-live Alma, will saved rules carry over (merge, normalization, and indication) in CSUN's IZ as well as the NZ rules? Should I back them up just in case?

Will import profiles carry over as well?

from Humboldt State to everyone:

does that reset the missing date to when you run the job?

from Mark B. (Los Angeles) to everyone:

ah, so this "empty" would be material that is otherwise okay (no loc change or work order, for example)

from Christina S (CSUCI) to everyone:

actually - i can see that dolph already DOES work all hours to put these beautiful docs together... so very helpful

from Micah to everyone:

Did we get an answer on CSUNs question?

from CSUN to everyone:

Yay. Thank you

from Mark B. (Los Angeles) to everyone:

Restating question about Analytics I've been asked "...all the reports I have created in Analytics and saved in private folder will be brought over to Alma production?" (someone at LosAngeles asked this)

from Mark B. (Los Angeles) to everyone:

(thanks for the 'empty' response)

from Chico to everyone:

One fulfillment question. Should we turn requests and renew off in Sierra (can we?) if we send our data for fulfillment on June 8th (thurs) because we are closed Fri-Sun

from Chico to everyone:

Closed June 8-11 - no checkouts, but renewals and requests could happen?

from CSUN 2 to everyone:

but these would be tied to internal users created in Alma at this point

from Sacramento State to everyone:

will that go for Sac and San Marcos also?

from Mark B. (Los Angeles) to everyone:

copy any Private Folder analytics to Shared Folder

from Mark B. (Los Angeles) to everyone:

thank you

from Dolph Chaney to everyone:

Q: "...all the reports I have created in Analytics and saved in private folder will be brought over to Alma production?"

from Dolph Chaney to everyone:

A: Move these to Shared / Community folders.

from Humboldt State to everyone:

Thanks Dolph, that's a load of info.

from Christina S (CSUCI) to everyone:

sincerely... incredibly useful, consolidated info

from CSUN to everyone:

thank you very much!

from Christina S (CSUCI) to everyone:

thanks much dolph

from ywzhang to everyone:

Thanks so much, Dolph!!

from Janée Mason (HSU) to everyone:

thanks!!!

from Mark B. (Los Angeles) to everyone:

Hear! Hear! thank you Dolph Megan and All...

from Cal Poly SLO to everyone:

thanks

from Pam to everyone:

Thank you so much!