

I-Share Alma Migration Form Update Survey

Use

this short, online survey form to tell CARLI about any changes that need to be made to your institution's Migration Form for the production/cutover load. The Test I-Share Alma Migration/Implementation Form was completed last summer and due on July 23, 2019. Many libraries will not need to change anything from their Test Migration Form. The default answer to most of the questions below is "No change". This means "No change to the answer as found on the Test Migration Form". You should edit only those answers that you wish to change from the answer as found on the Test Migration Form. Your Test Migration Form can be found in your Box folder in the "XXX Production Load" folder with the name "Alma Production Migration Form XXX_DRAFT.xlsm". If you previously spoke with CARLI staff about making changes to your institution's form, or have already edited the Test Migration Form in your Box folder, you still must complete this survey to indicate any updates/changes. If you have any questions about entries on the Test Migration Form that are not covered below, please email CARLI Support at support@carli.illinois.edu with your specific questions. This form should be submitted once by the I-Share library's Alma/Primo VE Contact no later than 5pm on April 1, 2020.

I-Share Institution

Your Name

Your Email Address

Migration Form Questionnaire Tab

The following questions come from the Questionnaire Tab of the Migration Form. Each question references the specific line number on the form.

Q1. List the 035\$a prefix for any bibliographic records to be skipped by P2E (formerly asked as "List the prefix for SFX or other link resolver system record numbers").

The migration program will look for the string in the bibliographic record 035 \$a field and skip all records where the string is found from being processed by P2E.

If your library uses SFX through CARLI for your link resolver AND you currently load records from SFX into Voyager, then put '(SFX)' here.

If you use a different link resolver system other than SFX and have bibliographic records for e-resources in Voyager from that system, put the prefix string that indicates bibliographic records from that system here.

If there are any other record prefixes that indicate records should be skipped by P2E, indicate them here.

Multiple strings are allowed, separated by semicolon, for example:
(SFX);(WaSeSS);ssj;ebrary

Line 17 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q2. Do you want to migrate suppressed serial issues data?

Serial issues that are migrated from Voyager to Alma create new item records in Alma. In Alma, item records contain the check-in history.

Decide if serial issues checked-in in Voyager Acquisitions that are flagged as suppressed from OPAC view in Voyager should be migrated to Alma. In the Voyager Acquisitions client, this is specified on the Receipt History tab where the "Display in OPAC" column says "No".

If you answered Yes to this question in the Test Migration, these issues migrated to Alma as new item records with their receipt history and are unsuppressed with a note that they were suppressed in Voyager so that you could find them after migration and re-suppress them.

If you answered No to this question, check-in information and receipt history for the suppressed issues was lost in the Test Migration because the suppressed issues are not migrated to Alma.

Issues that have been collapsed (those in the Receipt History tab where the "Collapsed" column says "Yes") are not migrated no matter how you answered this question.

If you do not have any checked-in serial issues in Voyager Acquisitions, you should have answered No.

CARLI recommends "No, do not migrate suppressed serial issues data".

Line 19 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q3. Do you want to generate a system-formatted barcode for serial issues?

The migration to Alma can generate an item barcode for issues checked-in in Voyager Acquisitions based on the serial issue and component identifiers. However, this barcode is not mandatory and the items created from serial issues can remain without a barcode if desired.

If you do not have any checked-in serial issues in Voyager Acquisitions, you should have answered No on the Test Migration Form.

Line 20 on Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q4. Specify which bib tags should be marked as "local".

You may specify bib tags to be marked as local in your Alma Institution Zone (IZ). You may specify tags plus indicators. Use '#' to specify any value, and 'b' to specify a space. Separate multiple tags by semicolon.

ALLOWED LOCAL FIELDS ARE 09X, 59X, 69X, 77X, 78X, and 950-999. No other fields may be marked

as local.

Ideally, during the Test phase you will have identified where you have kept local data in your bibliographic records. If the data are not in the allowed fields listed above, you can move them into one or more of the allowed fields. CARLI recommendations for Local, Copy-Specific Details in Alma can be found at: https://www.carli.illinois.edu/products-services/i-share/alma/cataloging/local_extensions

CARLI does NOT recommend selecting 77X or 78X here as "local".

CARLI does recommend selecting any of the following fields where you know that local data has been stored: 09###; 59###; 69###; 95###; 96###; 97###; 98###; 99###

No other "local data" are automatically moved into the fields designated here. If you have data like "500 \$a Local note \$5 XXX" in a record, that data must be moved to one of the allowed fields either before migration or recovered and moved after migration.

Example input: 69###; 590b#; 595##

(which means 69X fields with any indicators, 590 fields with first indicator blank, and 595 fields with any indicators)

Line 30 on Alma Production Migration Form XXX_DRAFT.xlsm

Q5. Do you want to migrate course reserves data from Voyager to Alma?

Options are:

Yes - Migrate all course reserves

Active only - Migrate only course reserves and reading lists for active courses.

No - Do not migrate any course reserves

What is "Active"? In order to determine the begin and end dates for a course, and subsequently the active/inactive status, the migration looks at the associated reserve lists. For each course, it finds the reserve list which expires furthest in the future, and uses the begin and end dates from that reserve list for the begin and end dates of the actual course. Then, in order to determine if the course is active or not, it checks if today's date is between those begin and end dates.

Line 33 on on Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q6. Which identification number should be used as the primary identifier in the user record in Alma?

Select which identifier will be used as the primary identifier for your patron records. If you will be doing patron batch loads into Alma from your institution's registration systems (i.e. Bursar or SIS), make sure the value you choose as the primary identifier in Alma matches the value your registration system considers to be the primary unique identifier for your patrons.

Institution ID is the most common choice for libraries who perform patron batch loads.

The most recent Active Patron Barcode in Voyager is the other option. If the patron does not have an Active barcode, Alma will use patrons' most recent Inactive barcode from Voyager.

Line 37 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q7. Augment the patron record's primary identifier?

During the migration from Voyager to Alma, you can have Alma add a prefix or a suffix to your patron records' primary identifier. After migration, libraries will likely load patron records into Alma from their local bursar's system or student information system (SIS). In order to ensure a proper patron match, libraries must be certain that an identification number in Voyager will migrate to Alma as a matchable identification number in Alma – typically, the identification number in Alma must match an identification number available to LDAP, Shibboleth, or some other external authentication system. The LDAP or Shibboleth identification number is often different than the regular Institution ID, and the difference is almost always indicated by a prefix or suffix.

Line 39 on the Alma Production Migration Form XXX_DRAFT.xlsm

Q8. If you answered "Yes, add Prefix" or "Yes, add Suffix" to the above question, list the text string that should be added below.

Line 40 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q9. Does your library have patron groups whose records will not be added by batch load?

Many I-Share libraries have a few patron groups where the records will have to be added to Alma manually, not as a part of a load from SIS or similar. The patron groups specified here will continue to be managed only within Alma; any patron groups that are NOT specified here will be externally managed via SIS Integration.

List the patron group codes at your library where staff will add the associated patron records manually as internal users in Alma. Separate them with a comma.

Example: AL,LH,PPPH

These codes are case-sensitive, so be sure the capitalization is the same as the code in the Voyager database.

If you will not add any patron group records manually to Alma, indicate "None".

Line 43 on Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q10. If a patron record has no expiration date in Voyager, the migration will set a default expiration date in Alma. Choose which date to use below.

CARLI recommends that you choose an expiration date prior to or within a year of going live on Alma. If you do not choose a different date below, the default expiration date will be June 30, 2021.

Line 44 on the Alma Production Migration Form XXX_DRAFT.xlsm

06/30/2021 

Q11. Does your library want to migrate Voyager Acquisitions data during the production/cutover load?

The options are:

Full Acquisitions

Partial Acquisitions - Vendors, Funds, and Purchase Orders only (no Invoices)

No Acquisitions

If you migrated either Full or Partial Acquisitions data during the Test load but are now choosing "No Acquisitions" for the production/cutover load, CARLI staff will follow up with you.

Line 47 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q12. Indicate if you want to automatically close purchase orders that are NEW and older than N years.

You may choose a number from 0 to 5 years.

Choose 0 if you do not want any POs to be automatically closed by the migration to Alma.

CARLI recommends closing purchase orders that are NEW and older than 1 year.

Only if migrating Acquisitions data - Line 48 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q13. Indicate if you want to automatically close purchase orders that are SENT and older than N years.

You may choose a number from 0 to 5 years.

Choose 0 if you do not want any POs to be automatically closed by the migration to Alma.

CARLI recommends closing purchase orders that are SENT and older than 1 year.

Only if migrating Acquisitions data - Line 49 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q14. Indicate if you want to automatically close purchase orders that are single part (0), have been invoiced, and are older than N years.

You may choose a number from 0 to 5 years.

Choose 0 if you do not want any POs to be automatically closed by the migration to Alma.

CARLI recommends closing purchase orders that single part (0), have been invoiced, and are older than 1 year.

Only if migrating Acquisitions data - Line 50 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change

Q15. Renewal Date for Active Subscriptions

If a date cannot be found based on past invoicing, Alma will use the default date chosen here. If you do not choose a different date below, the default renewal date will be June 30, 2021.

Only if migrating Acquisitions data - Line 54 on the Alma Production Migration Form XXX_DRAFT.xlsm

06/30/2021



Q16. Do you want classic prediction patterns migrated from Voyager to the Alma holding record?

Only regular (classic) prediction patterns are migrated; complex patterns cannot be migrated to Alma. Alma allows for a single prediction pattern per holding record, so if there are multiple patterns on a single holding in Alma, duplicate holdings will be created.

Options are:

Current - An 853/854/855 tag will be added to the Alma holding record for current classic prediction

patterns, and an item will be created for the next expected issue.
Current and Historical - An 853/854/855 tag will be added to the Alma holding record for current classic prediction patterns, and an item will be created for the next expected issue and the same information will be added for closed patterns.
None - Do not migrate classic prediction patterns

If you are using Voyager Acquisitions serials check-in, CARLI recommended choosing "Current".

If migrating Acquisitions data - Line 56 on the Alma Production Migration Form XXX_DRAFT.xlsm
If not migrating Acquisitions data - Line 49 on the Alma Production Migration Form XXX_DRAFT.xlsm

Q17. Which fiscal year should be the current fiscal year when we go live on Alma? *

Answer this question based on whether you will do fiscal period close (FPC), also known as rollover, in Voyager before April 24, or after we go live on Alma in June.

If you will rollover in Voyager before April 24, choose 2021.
If you will rollover in Alma after we go live, choose 2020.
If you are not migrating Acquisitions data to Alma, choose 2021.

If migrating Acquisitions data - Line 65 on the Alma Production Migration Form XXX_DRAFT.xlsm
If not migrating Acquisitions data - Line 55 on the Alma Production Migration Form XXX_DRAFT.xlsm

Select ▼

Q18. How do you want to migrate your Reporting Funds?

MAP will translate existing Voyager reporting funds to the reporting codes field in Alma. Reporting funds' transactions will be assigned to the parent allocated fund. You will be able to change the descriptions (which default to the Voyager reporting code) after your library is live on Alma, if desired.

DONOTTRANSFER means your library will not use reporting codes in Alma at all. During migration, Voyager reporting funds' transactions will be assigned to the parent allocated fund in Alma. The reporting code field in Alma will be left blank, and all other information about reporting codes in funds from Voyager will not migrate.

ALLOC will change the reporting fund in Voyager into an Allocated fund in Alma, and all transactions are assigned to that allocated fund and no reporting codes are created in Alma.

Only if migrating Acquisitions data - Line 66 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change ▼

Q19. Which Holding or Bib field stores electronic link public note?

This is usually the 856 \$z.

If migrating Acquisitions data - Line 71 on the Alma Production Migration Form XXX_DRAFT.xlsm
If not migrating Acquisitions data - Line 59 on the Alma Production Migration Form XXX_DRAFT.xlsm

No Change ▼

Q20. Which Holding or Bib field stores electronic provider name information?

This is usually the 856 \$3 but may also be Bib fields 791, 793, or 797 (subfield a).

If migrating Acquisitions data - Line 72 on the Alma Production Migration Form XXX_DRAFT.xlsm
If not migrating Acquisitions data - Line 60 on the Alma Production Migration Form
XXX_DRAFT.xlsm

Q21. Do you want the P2E process to include suppressed bibliographic records from Voyager?

CARLI recommends that you choose Yes for the production/cutover load.

Yes = Include suppressed bibs in the P2E process. An electronic resource will be created, and the bib will continue to be suppressed in Alma.

No = Do not include suppressed bib records in the P2E process. Suppressed bibs will be migrated to Alma as physical holdings (bib, mfhd, and item) and continue to be suppressed; they will not be migrated as electronic inventory.

If migrating Acquisitions data - Line 73 on the Alma Production Migration Form XXX_DRAFT.xlsm
If not migrating Acquisitions data - Line 61 on the Alma Production Migration Form
XXX_DRAFT.xlsm

No Change

Q22. Do you want the P2E process to include suppressed holding records from Voyager?

CARLI recommends that you choose No for the production/cutover load.

Yes = Include suppressed holdings in the P2E process. The generated e-resource will not be suppressed.

No = The P2E process will not consider suppressed holdings when looking for holdings to convert to electronic, and will make an e-resource from other electronic entities on the bib or from the bib itself.

If migrating Acquisitions data - Line 74 on the Alma Production Migration Form XXX_DRAFT.xlsm
If not migrating Acquisitions data - Line 62 on the Alma Production Migration Form
XXX_DRAFT.xlsm

No Change

Questions About Locations, Libraries, and Vendors

L1. Have there been any changes to the list of locations that your institution indicated were electronic locations in Voyager?

In order to generate the P2E files, CARLI must have a current list of your electronic locations in Voyager.

Check the Alma Production Migration Form XXX_DRAFT.xlsm form's Location Mapping tab Column G to make sure that all locations with electronic resources are marked as Yes.

If you need to make any changes to the Electronic Location designation, please indicate the Voyager Location Code, the Voyager Location Name, and the change below.

No Changes to Electronic Locations

L2. Have you added any new locations in Voyager and/or Alma?

Locations are one of the data elements that are retained like standard configuration between the Test load and the production/cutover load. However, if any new locations have been added to Voyager since the Test Load, they must have also been added to Alma, AND they must be represented and mapped accordingly on the Location Mapping tab of the Migration Form that will be used for production/cutover.

If you have added any new locations to Voyager and Alma, please indicate the location codes and location names below so that CARLI staff can check that they are properly mapped and follow up with you if needed.

Example:

Voyager location code | Alma Library | Alma location code | Alma location name
pharmacy | MAIN | pharmacy | Pharmacy Stacks

If you have more than five, please indicate that below and contact CARLI at support@carli.illinois.edu.

L3. Do you wish to change any of the Voyager-to-Alma location mappings from the Test Load?

Locations are one of the data elements that are retained like standard configuration between the Test load and the production/cutover load. However, you do have the opportunity to change the mapping of your Voyager locations to Alma Libraries and/or Alma locations, if desired. See the Location Mapping tab of the Alma Production Migration Form XXX_DRAFT.xlsm for Test load mappings.

If you wish to make any changes to mappings, please indicate the location(s) below so that CARLI staff can follow up with you.

No Changes to Location Mappings

L4. Have you added any new libraries in Alma?

Alma Libraries are one of the data elements that are retained like standard configuration between the Test load and the production/cutover load.

If you have added any new Alma Libraries in Alma, or have been thinking about adding or deleting Alma Libraries, please explain below so that CARLI staff can follow up with you.

No New Alma Libraries

L5. Have you added any vendors to Voyager or Alma?

Vendor records are one of the data elements that are retained like standard configuration between the Test load and the production/cutover load. If any new vendors have been added to Voyager since the Test Load, they must have also been added to Alma.

If you have added any new vendors to Voyager and Alma, please indicate the vendor codes below.

No New Vendors

Other Questions

Q1. Do you wish to retain Course Reserves "containers"?

Optionally, Courses and Reserve Lists may be retained from the Test load data, but they will not contain any bibliographic citations because those data are reloaded from a fresh, current extract from Voyager. If your library has been setting up "real" courses and reserve lists during the Alma Test phase, you may want to retain those data. If not, CARLI recommends that you do not retain Course Reserves "containers".

If you answer Yes here to retain Course Reserves containers, you must change your answer to Q5 (Do you want to migrate Course Reserve data?) above to "No, Do not migrate any course reserves" in order to preserve the existing data.

No, do not retain Course Reserves containers

Q2. Do you wish to retain Acquisitions Fund data?

Optionally, if you are migrating Acquisitions data and you have been performing realistic ledger and fund clean-up in Alma during the Test phase, you may wish to retain these data. However, if retained, the production/cutover load must have the same fiscal period defined as in the Test load, otherwise funds linked to the old fiscal period will not link to the new fiscal period. This would also necessitate that you do NOT perform FPC/rollover in Voyager before April 24 and must wait to rollover in Alma once we are live.

CARLI recommends that if you have any question about this that you do NOT retain Acquisition Fund data.

No, do not retain Fund data

Send me a copy of my responses

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