Migrating to Alma: Data and Functionality Testing

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Implementation

• Functional Teams
  – Acquisitions
  – Digital
  – Discovery
  – E-Resources
  – Fulfillment – Interlibrary Loan
  – Resource Management
  – Technical - Data
Testing Phases

- 3 Campus Test
- 14 Campus Test
- Production Load Test
Gross Measures Testing

- Ex Libris Provided Statistics
- Test record sets
- Data mapping
Functional Testing

- Configurations
- Basic functionality for each area
- Primo Testing
- Resource Sharing
Ex Libris Documentation

• Voyager to Alma Migration Guide
• SFX to Alma Migration Guide
• Alma Migration Considerations for Consortia
• Testing Acquisitions Data Migration to Alma
• Testing Fulfillment Data Migration to Alma
• Testing Resource Management Data Migration to Alma
• Alma Go Live Check List
Tools Used

- Salesforce
- Email Listservs
- Aquery and Voyager Reports Access Database
- Confluence Wiki
- Redmine Project Management
Confluence Wiki
Redmine Project Management

Overview

This project tracks support issues and configuration changes for UW System Alma and Primo.

We track configuration changes in order to understand changes in the behavior of our Library Services Platform and Discovery tools and to document how and when we have changed policies implemented in these tools.

Three kinds of issues are tracked:
1. Support issue
2. Configuration change
3. Minor configuration change

Configuration changes that implement changes in policy or that impact practices or behavior for Alma/Primo components at more than one campus are vetted by appropriate consortial governing bodies. The workflow for the configuration change issue type reflects this governance step.

Configuration changes that do not imply changes in policy and that have limited local impact do not require vetting by appropriate governing bodies. The minor configuration change issue type has a simpler workflow.

Issue tracking

- Support Issue: 151 open / 266
- Change: 29 open / 29
- Minor change: 7 open / 7

View all issues

Members

Campus Decision Maker: Craig Thomas, Crystal Rossi, Nichole Chisholm, Peter Sierman
Alma Test/Issue Reporter: Bill O'Brien, Crystal Rossi, Henry Thompson
Alma Issue owner: Bruce Barton, Craig Thomas, Jeff Williams, Keith Rye, Peter Gorman, Terry Stika
Alma Read Only: Becca Peters, Brandon McCready, Carol Eisen, Christy Boyer, Deb Strelka, Karen Jander, Lindsay Simonsen, Lisa Pillow, Michael Johnson, Robert Karels, Sharon Knight
Campus System Administrator: Bruce Barton, Bryan Vogh, Cheryl Hessman, Craig Thomas, Curren Riley, Dan Hill, Janet Fadhay, Jay Dougherty, Jessica Donahoe, Jim Lowrey, Jon Musselman, Karen Rattunde, Kate Russell, Kati Tvaruzkova, Kate Sanders, Laura Jacobs, Maureen Olle-Lalonde, Melissa Platkowski, Mitch Lundquist, Patty Fragola, Ron Hardy, Scott Prater, Steve Meyer, Sue Dentinger, Susan Lindahl, Terri Muraski, Terry Stika
Change Manager: Bruce Barton, Craig Thomas, Dineen Groth, Jackie Crison, Jen Holman, Jim Lowrey, Joe Tomich, Karen Rattunde, Kate Sanders, Lee Konrad, Mitch Lundquist, Scott Prater, Steve Meyer, Sue Dentinger, Susan Foran
Change Governance Team Member: Bruce Barton, Dineen Groth, Jackie Crison, Jen Holman, Jim Lowrey, Joe Tomich, Karen Rattunde, Kate Sanders, Lee Konrad, Mitch Lundquist, Scott Prater, Sue Dentinger, Susan Foran
Alma issue reporter: Aaron Dobbs, Ann Halvorsen, Bruce Barton, Bryan Vogh, Cheryl Hessman, Craig Thomas, Curren Riley, Dan Hill, Dineen Groth, Henry Thompson, Jackie Crison, Janet Fadhay, Jay Dougherty, Jeff Williams, Jen Holman, Jessica Donahoe, Jim Lowrey, Joe Tomich, John Hubbard, Jon Musselman, Karen Jander, Karen Rattunde, Kate Russell, Kati Tvaruzkova, Kate Sanders, Keith Rye, Laura Jacobs, Lee Konrad, Maureen Olle-Lalonde, Melissa Platkowski, Michael Cohen, Michele McInelley, Mitch Lundquist, Nichole Chisholm, Patty Fragola, Peter Gorman, Ron Hardy, Scott Prater, Steve Meyer, Sue Dentinger, Susan Foran, Susan Lindahl, Terri Muraski
Challenges

• Account provisioning
• Knowing what to test
• Communicating protocols
• Network Zone
• Archives
• Resource sharing
Successes

- Offline Circulation
- Most data came over as expected
- Most functionality was there
- Went live May 20, 2015