

Migrating to Alma: Data and Functionality Testing

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University of Wisconsin System




Primo Central


Primo


Voyager


SFX


MetaLib


bx

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

Confluence Spaces ▾ People Browse ▾ Create

Project Administration
Functional Teams
Campus Teams
Ex Libris Links
Training Portal
Post Go-Live
Wiki Guidelines & Tips

UW System Library Services Platform
UW System Library Services Platform Home
Created by BRADLEY LEEGE, last modified by PAULA M SUMPTER on Aug 23, 2015

Wiki Site Administrator: Paula Sumpter Email: psumpter@library.wisc.edu

Alma Implementation News

Filter = Announcements-Home / 10 Most Recent Posts
[Read the complete project blog to view earlier posts.](#)

Alma Health Checklist Review

PAULA M SUMPTER posted on Jul 13, 2015

In an effort to expedite any team review of the campus/team responses to the checklist form, all returned forms have been [posted together on the wiki under Post Go-Live](#). The links connect to the returned campus and team form and include the name of the respondent so you may follow up if you wish. Not all forms have been returned - they will be posted as soon as they arrive. Question? Please ask Paula.

Edit · [announcements-home](#)

P2E Forms Posting Page

PAULA M SUMPTER posted on Apr 16, 2015

Quick Links

- Project Plan
- ALMA KB
- Meetings
- Data Testing
- All PM Docs
- Training
- Contact Info
- Cutover Info

Recently Updated

- NICHOLE MARIE CHISHOLM**
Discovery - Collecting No Loan locations from campuses updated yesterday at 08:10 AM - [view change](#)
- CURRAN D RILEY**
UW-Madison LSP Planning Committee updated Aug 25, 2015 - [view change](#)

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Redmine Project Management

Alma Primo Issue and Change 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 Buss, Nichole Chisholm, Peter Gorman
 Alma Test/Issue Reporter: Bill Doering, Crystal Buss, Henry Thompson
 Alma issue owner: Bruce Barton, Craig Thomas, Jeff Williams, Keith Rye, Peter Gorman, Terry Stika
 Alma Read Only: Becca Peters, Branden McCready, Carol Elsen, Christy Boyer, Deb Strelka, Karen Jander, Lindsay Simonsen, Lisa Pillow, Michael Johnson, Robert Karels, Sharon Knight
 Campus System Administrator: Bruce Barton, Bryan Vogh, Cheryl Nessman, Craig Thomas, Curran Riley, Dan Hillis, Janet Padway, Jay Dougherty, Jessica Donahoe, Jim Lowrey, Jon Musselman, Karen Rattunde, Kate Russell, Kati Tvaruzka, Katie Sanders, Laura Jacobs, Maureen Olle-LaJoie, 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 Grow, Jackie Crinion, Jen Holman, Jim Lowrey, Joe Tomich, Karen Rattunde, Katie Sanders, Lee Konrad, Mitch Lundquist, Scott Prater, Steve Meyer, Sue Dentinger, Susan Foran
 Change Governance Team Member: Bruce Barton, Dineen Grow, Jackie Crinion, Jen Holman, Jim Lowrey, Joe Tomich, Karen Rattunde, Katie Sanders, Lee Konrad, Mitch Lundquist, Scott Prater, Sue Dentinger, Susan Foran
 Alma issue reporter: Aaron Dobbs, Ann Hanlon, Bruce Barton, Bryan Vogh, Cheryl Nessman, Craig Thomas, Curran Riley, Dan Hillis, Dineen Grow, Henry Thompson, Jackie Crinion, Janet Padway, Jay Dougherty, Jeff Williams, Jen Holman, Jessica Donahoe, Jim Lowrey, Joe Tomich, John Hubbard, Jon Musselman, Karen Jander, Karen Rattunde, Kate Russell, Kati Tvaruzka, Katie Sanders, Keith Rye, Laura Jacobs, Lee Konrad, Maureen Olle-LaJoie, Melissa Platkowski, Michael Cohen, Michele McNelly, 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


ExLibris Alma


ExLibris
Primo


ExLibris bx


ExLibris
Primo Central