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ExLibris Alma

Go Live Readiness Checklist

The purpose of this checklist is to help library staff verify that essential day-to-day functionality is set up properly, and that library staff are able to perform this work successfully in preparation for going live on Alma and Primo VE.

CARLI has somewhat modified Ex Libris' standard checklist, but this is predominantly an Ex Libris document and task. Not all tasks will apply to every institution. An asterisk (*) Indicates that the check may involve an external integration with Alma and another product or service.

Ex Libris would like to have these forms returned by mid-July 2020 so that we can follow up on issues before fall terms begin. Please enter your 3-letter code in the header. Return your form to CARLI at support@carli.illinois.edu

Customer name:	CARLI
Institution name:	
Reviewer name:	
Date of last review:	
Planned Alma Go Live date:	June 24, 2020

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	Acquisitions						
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
AC1	***** Are you able to place an order (manually and/or via EOD)?	☐	☐	☐	☐	Broadly: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing Ordering Specifically: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines	
AC2	Are you able to execute "Order now"?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines/020Real-Time_Acquisitions	
AC3	Are you able to receive physical material?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/090Receiving_Material	
AC4	Are you able to activate e–resources from Community Zone (portfolios and e-collections)?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Activating_Electronic_Resources	
AC5	Are you able to create local e–resources (portfolios and e-collections)?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_a_Local_Electronic_Collection	

	Acquisitions						
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
AC6	Are you able to manage the process of e-acquisitions (licensing and test access)?	☐	☐	☐	☐	Licensing: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Associating_a_License_to_a_Portfolio Test Access: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Activating_Electronic_Resources	
AC7	* Are you able to create an invoice (manually and/or batch)? * Do you have the correct approval and review rules in place?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/030Invoicing/010Invoicing_Workflow	
AC8	* Are you able to export an invoice for payment? * Do you have the correct approval and review rules in place?	☐	☐	☐	☐	https://developers.exlibrisgroup.com/alma/integrations/finance/invoice-export/	
AC9	Are you able to manage the process of rolling over a fiscal year?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/100Advanced_Tools/020Fiscal_Period_Closure	

	Resource Management and Inventory						
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
R1	* Are you able to import new records (individually and batch)? e.g., via Connexion, files from vendors.	☐	☐	☐	☐	"Importing Bibliographic Records from WorldCat to Alma" discusses importing new records using OCLC Connexion's Gateway Export and using Search Resources in the Alma MD Editor: https://www.carli.illinois.edu/sites/files/i-share/documentation/Importing_Bibliographic_Records_from_WorldCat_to_Alma.pdf. Record Import with links to import profile documents: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/060Record_Import	
R2	Are you able to overlay/merge brief bib records with full bibliographic records?	☐	☐	☐	☐	"Importing Bibliographic Records from WorldCat to Alma" discusses overlay and merge options using OCLC Connexion's Gateway Export and using Search Resources in the Alma MD Editor: https://www.carli.illinois.edu/sites/files/i-share/documentation/Importing_Bibliographic_Records_from_WorldCat_to_Alma.pdf. Working with Merge Rules: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/080Working_with_Merge_Rules	

		Resource Management and Inventory					
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
R3	* Are you able to perform copy cataloging from all required external search resources?	☐	☐	☐	☐	External Search resources: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/090Searching_External_Resources#Working_with_Search_Resources_in_the_MD_Editor	
R4	* Are you able to publish your records to external sources? e.g., Google Scholar, OCLC, Hathi Trust, union catalogs	☐	☐	☐	☐	CARLI is working with OCLC to modify existing Data Sync Collections so libraries can publish holdings to WorldCat after Go Live. Publishing profiles for other exports: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/075Publishing_Profiles	

		Resource Management and Inventory					
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
R5	* Are you able to batch update bibs and items using Update jobs and Normalization processes?	☐	☐	☐	☐	Running Manual Jobs: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Running_Manual_Jobs_on_Defined_Sets Normalization resources: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/070Working_with_Normalization_Rules#Normalization_Rule_Syntax https://developers.exlibrisgroup.com/blog/alma-normalization-rule-examples/ https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/030Configuring_Cataloging#Working_with_Normalization_Processes	CARLI can continue to provide this service as needed.

	Resource Management and Inventory						
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
R6	* Are you able to print spine labels?	☐	☐	☐	☐	Spine-O-Matic resources: January 30, 2020 Office Hours on Spine-O-Matic: https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours https://developers.exlibrisgroup.com/blog/spineomatic-label-printing-software-for-alma/ https://github.com/ExLibrisGroup/SpineOMatic Other options: https://knowledge.exlibrisgroup.com/Alma/Product_Document ation/010Alma_Online_Help_(English)/040Resource_Managem ent/080Configuring_Resource_Management/120Configuring_th e_Label_Printing_Tool	
R7	Have you started contacting your e-resource vendors to start using the Alma Link Resolver?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/alma-primo-faq#almafaq_linkresurl	

	Fulfillment						
	Library Activity - Requests	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F1	Are you able to print to your library's printers (either by quick printing, the printing queue, or sending the letters directly to the printer) notifications (e.g. receipts, transit slips)?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice191205 https://knowledge.exlibrisgroup.com/@api/deki/files/73678/Letters_-_The_Printout_Queue_and_Quick_Printing_in_Alma.pptx?revision=4 https://knowledge.exlibrisgroup.com/@api/deki/files/77785/Letters_-_Printing_features_coming_soon.pptx?revision=3 For example, the AFN basic workflow demonstrates when to expect Alma to generate some printed letters: https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN And demonstrated during : https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice20200123	

	Fulfillment						
	Library Activity - Requests	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F2	Are patron-facing notices sent (e.g., courtesy notices, lost loan notices, borrowing activity letters)?	☐	☐	☐	☐	During the Alma test phase, these are not automatically enabled to be sent to patrons. Library staff can test by forcing letters via jobs. https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Notices CARLI's Alma: Letters, overview and basic configuration: https://www.carli.illinois.edu/products-services/i-share/alma/config/letters	
F3	Can a patron physical resource request be fulfilled (retrieved from shelf, scanned-in to hold-shelf, checked-out to patron)?	☐	☐	☐	☐	AFN basic workflow: https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN Demonstrated during AFN office hours: https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice20200123	

	Fulfillment						
	Library Activity – Loans	**Yes**	**No**	**NA**	**Not Yet Tested**	Resources	**Notes**

	Fulfillment						
F4	Can items be loaned and returned: at the circulation desk? And, if applicable, at self-check machines?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/01_Working_at_the_Circulation_Desk https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment	
F5	Are non-circulatable items blocked from being loaned?	☐	☐	☐	☐	Fulfillment Configuration Utility https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOfficeHours#OpenOffice191107	

	Fulfillment						
	Library Activity – Fines/Fees	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F6	If you allow patrons to pay fines/fees at the circulation desk, can you successfully process these payments (print/send receipts, patron account updated)?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/01_Working_at_the_Circulation_Desk https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment	
F7	* Are you able to export user fines, fees, and blocks to your bursar office?	☐	☐	☐	☐		Optional

	Fulfillment						
	Library Activity – Resource Sharing	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F8	Are you able to create and update resource sharing borrowing requests?	☐	☐	☐	☐	AFN basic workflow: https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN	

	Fulfillment						
	Library Activity – Course Reserves	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F9	Can you create and update courses and reading lists?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_reserves	
F10	Are you able to discover published course information in your discovery system?	☐	☐	☐	☐	Course Reserves scope in Primo VE https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/Configuring_Course_Reserves_for_Primo_VE	

		Yes	No	NA	Not Yet Tested	Resources	Notes
	Fulfillment						
	Library Activity – General	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F11	Are you able to register a new patron?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/010Managing_Users https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment	
F12	When patrons ask about fines/fees assessed to them, or loaned items claimed to have been returned, are you able to find relevant information (e.g., dates, barcodes, amounts, audit trail)?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/01_Working_at_the_Circulation_Desk https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment	

	Fulfillment						
	Library Activity – General	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
F13	Can you successfully update the libraries calendar?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification/Fulfillment/Fulfillment_02%3A_Calendars https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Calendars Adding Exception Dates: https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Calendar_Management_-_steps_to_reduce_(or_add)_hours_over_the_library_Standard_Opening_Hours	

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User Management						
Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
U1 Are you able to manage staff users? You should be able to answer yes to the following questions: 1. Are all library staff able to login and perform their basic daily tasks? 2. Can we create new user records for library staff to use Alma? 3. Can we assign Alma staff roles to library staff users? 4. Can we create new user records for patrons?	☐	☐	☐	☐	The tasks involved in adding users manually are posted at https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/010Managing_Users Details on available staff roles and how to assign them is posted at https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/060Managing_User_Roles	
U2 * Are you able to sync user records in Alma with your institution's Student Information System (SIS)?	☐	☐	☐	☐	CARLI has provided sample export details for several common Student Information Systems. https://www.carli.illinois.edu/sis-student-information-systems-specific-patron-extract-resources	
U3 *Are you able to login to Alma and Primo VE using your single sign-on authentication service?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/User_Management/Authentication https://www.carli.illinois.edu/products-services/open-athens	

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	Primo VE						
	Primo Look & Feel	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
P1	Are Basic and Advanced search boxes configured correctly (search profiles etc.)?	☐	☐	☐	☐	CARLI documentation: https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustadvanced Search Profiles: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Search_Profile_Slots https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/022Search_Configuration/010Configuring_Search_Profiles_for_Primo_VE Course Reserves: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/Configuring_Course_Reserves_for_Primo_VE Advanced Search: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Advanced_Searches	

	Primo VE						
	Primo Look & Feel	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
P2	Are search results in Primo VE being displayed correctly?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustbriefresults https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Brief_Results_Page	
P3	Do the links in the Main Menu appear correctly and link to the desired web pages?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustlinksmenu https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Links_Menu	
P4	Does the full record view contain all relevant information (Details, Links etc.)?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustfullrecord Details: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Details_Service https://www.carli.illinois.edu/sites/files/i-share/documentation/Primo_VE_default_display_fields.pdf Links: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/034Get_It_Configuration/001Primo_VE_Delivery_Services https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/060Alma-Primo_Integration/060Configuring_Alma_Delivery_System/120Adding_a_General_Electronic_Service	

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	Primo VE						
	Primo Search & Brief Results	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
P5	Is the browse search configured correctly (if applicable)?	☐	☐	☐	☒	https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_Browse_Search https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/055Configuring_Advanced_Search_Interfaces_for_Primo_VE/Configuring_Browse_Search_for_Primo_VE	
P6	Are all facets configured correctly?	☐	☐	☐	☐	CARLI documentation: https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/viewconfigs#pvecustbriefresults Configuring Facets on the Brief Results Page: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Brief_Results_Page	
P7	Does My favorites functionality work correctly?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/End_User_Help/Using_My_Favorites_in_Primo_VE	

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	Primo VE						
	Patron's Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
P8	Can patrons request materials in Primo VE?	☐	☐	☐	☐	https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN#PrimoVERequesting	
P9	Can patrons renew renewable loans in Primo VE? (Is the renew option available and did the item renew according to your institution's policies?)	☐	☐	☐	☐		
P10	Can patrons view their fulfillment activities in Primo VE "My Account"?	☐	☐	☐	☐	My Library Card: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/End_User_Help/13Using_My_Library_Card_in_Primo_VE Configuration of My Library Card: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Library_Card_Configuration	
P11	Can patrons view links to e-resources?	☐	☐	☐	☐	E-resources appear in the View It section: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/034Get_It_Configuration/001Primo_VE_Delivery_Services#View_It	
P12	Can patrons view full text?	☐	☐	☐	☐	If full text is not working as expected, check authentication configurations and activation status of the resource.	

	Analytics						
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
AN1	Are you able to access Alma Analytics?	☐	☐	☐	☐	Users must have the Design Analytics role. Users should gain familiarity with the terminology and user interface. https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/020Navigating__Analytics	
AN2	Are you able to run out-of-the-box reports?	☐	☐	☐	☐	Out-of-the-box reports are identified at https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/060Out-of-the-Box-Reports Analytics users should also learn how to copy an out-of-the-box report to their institution's shared reports folder. https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/030Community_Folder_Structure	
AN3	Are you able to create a new report?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/050Creating_a_New_Report	

Analytics						
	Library Activity	**Yes**	**No**	**NA**	**Not Yet Tested**	**Resources**	**Notes**
AN4	Are you able to schedule a report?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/040Scheduling	
AN5	Are you able to subscribe to a report?	☐	☐	☐	☐	https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/040Scheduling	