Alma Post-Implementation at the Colorado School of Mines

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“Go Live is Only the Beginning”

Agenda:
• Who We Are
• Implementation In Theory
• Implementation In Practice
• The Future
Who We Are
Colorado School of Mines

Engineering, applied sciences university
Undergrads, Grads, Faculty, Staff, Community Members
CARL → Voyager → Alma
One campus
One library
20 staff
7000 patrons
600,000 Physical & 400,000 Electronic titles
Challenges Being Faced (2014)

Other campus functions moving into Library
Budget cuts
Loss of staff positions
Outdated workflows
Growing demand for efficiencies
Physical to electronic shift
Expanded user expectations
Voyager’s limitations
Implementation Timeline

Contract signed April 2014
Mines PM & library team assigned April 2014
Pre-Implementation April – December 2014
ExL project team assigned Dec 2014
Kickoff Jan 6 2015
Implementation Jan – May 2015
Go Live June 4 2015
Implementation In Theory
An Organizational Project

Implementation more than a technical project
It is an organizational project as well:
• If metadata exist, use them (CZ)
• Automate ordering
• Implement shelf-ready
• Simplify Electronic Resource Management
• Extend and enhance patron services

But as we know, change is hard…
Alma as a Tool for Change

We know change is hard
Alma implementation is an opportunity!

The centralization of technology:
• Formerly complex, disjointed systems topography

The de-centralization of knowledge:
• Alma’s consolidation, automation and unification promotes extending and sharing knowledge and skills, and the devolution of tasks
Realizing Full ROI of Alma

Understand Alma’s business processes
Use automation to streamline workflows:
• Implement exception-based workflows
• Workflows managed from within the system
• Minimal human intervention needed
Optimize via external systems integration
Empower staff to be self-reliant, improve skills and expand their focus
Implementation

A frantic and stressful time
Not enough bandwidth to “do it all”
Configuration and other decisions made when full impact not completely understood
Hard to make significant changes to workflows prior to Go Live
A post-implementation business process “health checkup” would be a valuable tool
6 Months Post-Implementation

Contentiousness between sections and dissatisfaction with some aspects of Alma

We self-identified a few major problems and a lot of minor issues (Other problems would be identified during Expert Optimization)

The Director wanted us to optimize workflows and processes as part of a “reorganization”

Needed to revisit some migration decisions

We all knew things could be “better”

Who could help?
Enter John Larson!
Expert Optimization Scope

Focus on Technical Services and Fulfillment

Analyze workflows

Identify problems, recommend solutions

3-Day Analysis Session

Recommendations and Work Plan Report

2-Day Configuration and Training Session

Final Summary Report with detailed recommendations and execution plan
Optimization Results

Implement YBP Shelf Ready
Fix Work Orders; Eliminate In Transit; Simplify “Desks” down to one
Resolve Course Reserves Issues
Resolve Alma Printing Problems
Workflows for Missing Items, Archival Materials
Streamline E-Resource workflows
Implement new patron services
The Future
Going Forward

Expert Optimization gave us a model to follow
It was incredibly helpful and successful
Realize implementation part of a progression
Momentum for continuing advancement
At six months the timing was perfect (for us)
Ultimately change becomes the norm
One Year Post-Implementation

Automating repetitive tasks
Other external systems integrations
Community patrons issues
Digital repository issues
New services implementation & marketing
Vision for the Future

PDA/DDA
Continue improvement of ERM
Research data
Keeping up with Ex Libris’ new directions
Vision for the Future

Expand auto-renewal to all
Single-point requesting
Unfillable requests to purchasing
Bookings for archival materials
Extend patron services
Vision for the Future

Evaluate and document best practices
Maximize training and knowledge
Governance of Alma and Primo
Devolution: Staff changes & future directions
Thank you!

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