Surviving Almanado

Tips for a Successful Pre-implementation

Laura Guy
Colorado School of Mines
What this session is

• Who we are
• Scope of project
• Things you might hear
• How is Alma different?
• How is this migration different?
• What is pre-implementation?
• What resources are available?
• Things you can do
• Data cleanup
• What matters?
• What we did
• What we didn’t
• Rules to live by
• Meanwhile
What this session is not

- Not about Change Management
- Not about Significant Emotional Events
- Not about marketing or P.R.
- Not about evaluating services
- Not Alma instruction
Who we are

• Engineering, applied sciences university
• CARL → Voyager → Alma
• One campus
• One library
• 20 staff
• 7000 patrons
• 600,000 Voyager bibs
• 39 Library “Locations”
• Go Live June 4
Scope of project

- ILS (Voyager; incl ACQ), SFX migration
- Libraries, Locations, Policies configuration
- External system integration (SIS/SSO etc.)
- Already familiar with Cloud approach
- Reserves, ILLiad, RAPID
- EDI, Worldcat, Connexion
- Primo
Things you might hear

- “Took me by surprise.”
- “I didn’t expect this.”
- I thought I’d retire, first…”
- “Is my job going to change?”
- “Will I have a job?”
- “What should we do NOW?!?!?”
How is Alma different?

- Unification, Simplification, Consolidation
- New concepts, terminology, approaches
- Exception-based workflows (automation)
- Unified metadata & services management
- External and internal services
- E-resources design from ground up
How is this migration different?

• Because Alma is different
• Your library is different
• Your campus is different
• Ex Libris Project Management
• P2E conversion
• Test migration before final migration
What is pre-implementation?

- Depends on your library
- “Getting ready”
  - Organizational setup
  - Preparation of data
  - Learning
  - Grounding of staff
  - Setting goals and expectations
What resources are available?

- Alma Documentation
- Alma-L Listserv
- Online Trainings
- Limited “live” help from Ex Libris
- Your current ILS
- This presentation & related materials
Appendixes

The following appendixes provide some additional information to help you prepare for your Alma and Primo implementation.

Appendix A – Fulfillment Simplification

When you prepare for your Alma and Primo implementation, it is important to develop a simplified and maintainable physical fulfillment policy. As part of your implementation, your fulfillment policy setup preferences are solicited based on the best-practice recommendations of the Ex Libris Alma and Primo project teams.

While in your current ILS system, it is likely that the biggest drivers for fulfillment policy are granular item-level tags (item status/item policy) and user group matrices. In Alma and Primo, fulfillment policy is primarily driven by physical location and user group. That is, the concept is that items are often grouped and shelved physically together in locations which circulate similarly (open stacks for regular circulation,
Appendix B – Optional Data Preparations

As you prepare for migration to Alma and Primo, Ex Libris recommends that your institution take advantage of the opportunity to perform some data clean up. While completely optional, undertaking some data clean-up efforts will improve the migration process and provide the best possible outcome as you make the transition to Alma and Primo.

The following are a number of recommendations that we have gathered during the past several years. Not all of these cleanups must be done now – many can be done in Alma later.

- Bibliographic, holdings, and item data
  - Fix bibliographic records that do not have a 245/title
  - Clean up chronology and enumeration (item/issue description) for serials as Alma uses these when sorting issue-level requests.
  - Identify links pointing to existing source systems that are migrated, so that they can be removed or updated, if necessary.
  - Identify and delete duplicate Bibs.
  - Identify and re-barcode any duplicate or unintentionally empty item barcodes.
  - Consolidate multiple holding records for identical item copies for the same location/call number.
  - Assign a value for empty collection/location for items/holdings, if applicable.
Things you can do

- Get your team(s) in place*
- Start reading the documentation
- Learning Center online trainings
- ELUNA/IGELU sites for presentations
- Evaluate workflows, practices…
- …and core business functions
- Get data ready
- Set priorities/goals, stay focused
- UStat
Keep in mind

• It takes time to understand new concepts
• Takes time to adjust to semantics changes
• Beware “I did it this way in Voyager”
• Adopt a solution-oriented, pragmatic approach
• Scrutinize your existing practices and workflows; identify areas to improve
Data cleanup

- Keep focused on what is migration related
- Consult the Implementation Guide
- Use Alma-L
- Define your scope: ILS, SFX, PCI, ERM
- How’s your patron data?
- Got missing/lost/stolen materials?
- Find “problem” areas like OTF/etc.
- Vendor cleanup
What matters?

• Locations and Location Types
• Patron Groups and Group Types
• Item/Material Types
• P2E Preparation: separate Bibs
• Print: Bib/MFHD/Item rec requirement
• Policy Simplification
• UStat (did I mention that already?)
• Surprise! Re-Authorization project
What we did

• Reports! Lots of Reports!
• Duplicate barcodes/Duplicate OCLC
• Bibs with mixed print/electronic holdings
• Delete expired patrons/purge old fines
• Cleanup reserves
• SFX Duplicates
• Bad PO cleanup
• OTF cleanup
What we didn’t

• Missing item records
• Enum/Chron
• Lost Books
• ACQ
• Reserves still a mess
• We didn’t ask enough questions
Rules to live by

• KISS
• Keep Calm And Carry On
• Beware the weeds
• Prioritize (you can’t do it all)
• No migration is perfect
• No data are perfect
• RTFM (& understand what you read)
• Be kind and grateful
Meanwhile

- Library services continue
- People still have other jobs besides Alma
- Keep your old ILS going
- Other change is inevitably occurring
- Life goes on
LIFE IS PECULIAR...

WOULDN'T YOU LIKE TO HAVE YOUR LIFE TO LIVE OVER IF YOU KNEW WHAT YOU KNOW NOW?

WHAT DO I KNOW NOW?
Thank you!

• URL for presentation on I.R. goes here.