GROUP FUN
MOVING TO ALMA IN THE COHORT MODEL

Terri Ann Coronel
Dan Taylor

ENUG 2017
About Ithaca College
Why Migrate to Alma?

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Our Legacy System Environment

- Voyager
- Primo
- 360 Core
- Ezproxy
- "ERM" (a.k.a. spreadsheets, access database, notes)
The Cohort Migration Model
The Cohort Implementation Model

- Up to 8 institutions
- Mix of legacy systems
- Mix of discovery layers
- Several operate throughout the year
- Implement in four (4) months
- Dedicated team of Ex Libris staff members
Logistics
Logistics

- Basecamp
- Salesforce
- EL-provided training videos
- Two 2-hour conference calls per week with EL and cohort
  - Skype for Business
  - Collaborative space is ideal
  - One-on-one calls when needed
Pros and Cons

PROS
- Price
- Cooperation
- Ex Libris project design
- Pace
- Cohort voice

CONS
- Compressed timeframe
- Deadlines are generally inflexible
- Go-Live configs are basic and require further customization
The Ithaca College Approach
The Team
The Team

- Team formed October 2016
- Project lead – Dan Taylor, Library Systems Specialist
- Functional leads:
  - Calida Barboza: Licensing/Primo
  - Terri Ann Coronel: Acquisitions
  - Ben Hogben: Circulation/ILL
  - Abby Juda: Reference/Primo
  - Kelly Merritt: Circulation
  - Kristina Shanton: Cataloging
  - Karin Wikoff: Ledger/Financials
Make a Plan
Get ready

- Held first planning meeting in 4 months before kick-off
- Began meeting weekly starting 3 months before kick-off

Before Kick-Off:
- Training and workflow reviews
- Communication planning (library/campus-wide)
- Coordinating with other campus constituents (IT, Bursar, Finance and Budget)
- Data cleanup in Voyager
Get set

- Alma Sandbox Access
  - Limited to team
  - Not our data
  - A little overwhelming

- Clear your schedule, wrap up other projects, prepare for a backlog of work

- Have a plan to keep up with the pace, stay organized, stay calm!
The race begins

- Kick-off
- Introduction to migration forms
- Watched videos as a team a week before cohort call
- Cohort calls + Implementation Team weekly meetings
- Lots of ad-hoc meetings throughout implementation
Forms, forms, forms
Forms, forms, forms

- Forms are filled out before you become familiar with Alma
- The forms are complex data migration mechanisms
- Spreadsheets help guide the migration process
- The decisions you make matter
- Ask questions if you don’t understand
Integrations
Alma Integrations

Required Integrations:
- **Authentication** *(SAML, CAS, LDAP, etc.)*
- **SIS** (patron data, can be multiple sources)

Optional Integrations:
- ERP (Financial)
- **ILL** *(ILLiad, Tipasa, Clio, etc.)*
- **OCLC** *(Connexion, holdings)*
- **EDI** and EOD *(Gobi, Oasis, etc.)*
- Bursar *(fines, fees, blocks)*
- **APIs**
Discovery Layer
Discovery Layer

- New customers migrate with Primo VE
- Discovery Layer is an important part of the process
- Primo is tough to implement quickly
- Already owned Primo
- Alma-sourced Primo is slightly different
Testing: Configs and Data
Testing: Configs and Data

- First data loaded 2½ weeks after kick-off
  - Look at data for errors
  - Practice routine tasks
  - Try to coordinate this between departments – see how the different parts of Alma interact
- If you don’t know, ask!
  - Post questions to Basecamp
  - Submit Salesforce cases for configurations, problems, and advanced help
Training

- We formed a training sub-committee
  - Started meeting weekly, 4 weeks into implementation to come up with a schedule and plan
- “Boot Camp” approach
  - Took place the two weeks prior to Go Live date
  - Two-hour sessions with PowerPoint, live demo and hands-on activities
  - Team led – one or two presenters, others on hand to help and answer questions
Alma Administrator Certification (Month of July)

- Took A LOT of time – new training is 30% less
- Must pass test, not too bad
- We watched as a group
- Discuss what we were seeing
- We did not get access to configs until Go-Live
What was awesome
What was awesome

- Formed a team early and met regularly before kick-off
- Weekly communiques were sent to all Library staff
- Our own Basecamp site to help keep up with internal to-do lists and to archive meeting minutes
- Getting all the stakeholders onboard early, especially IT
- Taking training seriously
- Getting people on-board for change from the start
- Having a large team to spread out the work
Oh, hindsight
Oh, hindsight

- Having a large team – more to manage
- Work/life balance and Voyager/Alma balance
- Taking better advantage of student assistants during implementation
- Configure Letters before Go-Live
- Allow all staff to receive Alma emails
- More real-world example testing
Living with Alma
Implementation team became the governance team
  – Still meeting weekly to discuss improvements
  – Assessing what’s working and what could be better
Continuing to develop workflows and configurations
  – Cataloging, Acquisitions, Fulfillment, E-Resources/Serials Teams are meeting every other week
Digging into automation (web forms, APIs, etc.)
Questions?