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The Library Didn't Explode: One Year After an Alma Migration

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Publication Information

Hockenberry, Benjamin, "The Library Didn't Explode: One Year After an Alma Migration" (2018). *Lavery Library Faculty/Staff Publications*. Paper 56.

https://fisherpub.sjfc.edu/library_pub/56

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The Library Didn't Explode: One Year After an Alma Migration

Abstract

Been with your old library system for a long time, and faced with an anxiety-ridden migration to something new? St. John Fisher College and Nazareth College were running Millennium/Sierra for over a decade before a switch to Alma in June 2017. New vocabulary, new data structures, new search systems -- was there anything that **wasn't** new? Allay your fears: it's been a year, and the library didn't explode. This informal presentation will discuss what made migration and post-implementation Alma life bearable: what went well, what we're still working on, and where we've turned for answers. And what you've likely been looking for -- a look under the hood of a live Alma environment in a (mostly) working system, with an open floor for discussion.

Disciplines

Library and Information Science

Comments

Presented at the IDS Project Conference at Utica College in Utica, New York on July 27, 2018.

The Library didn't explode.

One year after an Alma migration

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“Why did we do this?”



You can't walk away from this one.

Managing your migration

Your support network



Library staff and administration

IT

Colleagues in your institution and beyond : IDS!

Family and friends

Ex Libris Support

Get all hands on deck



Focused teams are needed for project meetings ...but *everyone* is part of this

Include input from all departments (don't forget Instruction!)

Designated liaisons between project leads and departments

Keep communication flowing

The big stuff



Don't sweat the config spreadsheets

Use your implementation coordinator

Read and act on feedback from test data loads

Document preexisting workflows

Figure out nice-to-haves vs. essentials

Take training seriously

Leverage available tools



Project management tools:
Asana, Basecamp, Keep, Trello

Keep track of progress, deadlines, and assignees

Dig into Salesforce Support Cases, Alma-L/Primo-L, and Knowledge Center

Protect yourselves

Back up all the data



Save everything from your old system

Copy the database if you have database-level access

Pull every report

Export all the MARC

...and save it all to two places. JIC.

Get your hands dirty



Don't be afraid, but take precautions

Learn to configure all you can

Use your test environment

Take screenshots and document
current state and changes

Manage expectations



Let your user base know change is coming
...and more change will come after that

Expect growing pains

Respond to feedback before and after

Freeze and Cutover

Offline time...



Plan staff projects

- 2 weeks tech services freeze
- 2-3 days checkout freeze

Training

Digitization projects

Offline circulation

Go-Live!



Overlap services, or hard switch?

If possible, schedule some *back-end* overlap:
you probably forgot something!

Test all the things

Communicate with users:
the feedback cycle starts now

After Migration

Celebrate!



You made it! Cue the group hugs!

And the continuing meetings...
but seriously, throw a party, you
went through a lot

You can fix it



Alma can change before AND after go-live

You're not stuck -- now it's **yours**

Touch base with all staff:
where are pain points occurring?

Work with product support

Suggest improvements through Idea
Exchange, NERS, and lists

Let's Get In There!

Links

Ex Libris Knowledge Center: <https://knowledge.exlibrisgroup.com>

St. John Fisher Primo: https://sjfc-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=01SJFC_INST

Pictures of Kittens:

<https://www.google.com/search?q=pictures+of+kittens&tbm=isch>

Thanks

The library staff at Fisher and Nazareth

Our mentors at IDS, Roberts, Ithaca, Northwestern, Tennessee, and UConn

Our library director and campus community

Our Alma implementation coordinator, Marina, and her support team

Questions?

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