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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
The Library didn't explode.

One year after an Alma migration
Ben Hockenberry, St. John Fisher College
bholckenberry@sjfc.edu
“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&tbum=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?

Ben Hockenberry, St. John Fisher College
bhockenberry@sjfc.edu