

Overview

The Mercer Libraries will undergo a migration to the Alma/Primo system over the course of 2019. This process generally lasts about 7 months. Mercer presents some additional challenges, as we will have to shift our paradigm from operating in three separate systems to working in a single, shared system.

We have paid for a premium migration and a standard sandbox. Implementation is typically a seven-month process, calculated backward from the expected go-live date.

Phase	Activity	Months	Months							
		minus 1-4	1	2	3	4	5	6	7	
Onboarding	Project orientation meeting	◆								
	Access to Alma and Primo Sandbox	◆								
	Getting to Know Alma Introductory Training									
	ILS and link resolver data preparation									
	Project planning tasks									
Define	Kickoff meeting		◆							
	Project plan									
	Project status calls									
	Analysis meeting									
	Training									
	Provide configuration & migration inputs									
	Test load and configuration									
Build	Access to Alma Production and Primo									
	Functional and data review									
	Functional calls									
	Onsite workshop									
	Go Live readiness checklist									
	Library staff training									
	Certification training									
	Cutover									
Deploy	Go Live									
	Health check									
	Switch to Support									

Library Obligations to Ex Libris During Migration

Ex Libris has about 1,600 libraries operating in Alma now, and vendors such as this are quite practiced in migrating users of other systems into their product. As such, they have spelled out what our roles are, and there are tasks we will have to accomplish. The following is excerpted from https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Guides/02Getting_Ready_for_Alma_and_Discovery_Implementation#The_Library

Responsibilities

- Implement Alma and Discovery within the agreed upon timeframe, according to the agreed upon contractual scope.
- Manage the internal library implementation team.
- Form a library implementation team of functional experts and appoint a project manager who serves as the primary contact for the Ex Libris project manager and manages the library implementation team.

Mercer Alma/Primo Implementation & Migration

- Test workflows end-to-end in the Alma and Discovery production environments and provide feedback to the Ex Libris implementation team concerning any necessary configuration modifications.

Alma and Discovery Project Team Roles/Skills

1) Project Manager

- a) leads and coordinates activities related to the implementation of Alma and Discovery for the institution
- b) responsible for ensuring that institutional staff resources are available to assist as necessary
- c) manages internal and external communications about the status and priorities of the project
- d) keeps the project moving and on track
- e) helps to mitigate project risks
- f) acts as primary point of contact with the Ex Libris project manager – including the following specific activities:
 - i) upgrading Ex Libris' source systems, when relevant, to a supported version prior to the Alma and Discovery implementation project and preparing the source systems for the data extract based on the requirements of the source system
 - ii) arranging access to data and the necessary space allocation required for data extraction (Ex Libris products) or delivering data (for non-Ex Libris products)
 - iii) managing the library implementation team in determining and reviewing migration and configuration settings
 - iv) preparing, scheduling, and training the library staff in a timely manner and within the timeframe of the agreed upon Go Live date
 - v) attending project meetings
 - vi) reviewing project plans
 - vii) managing and overseeing the testing processes and providing feedback
 - viii) setting and communicating relevant priorities with the Ex Libris project manager

2) Project Team - Functional Experts

- a) Acquisitions – has overall familiarity with workflows in the current system including ledgers/funds, POs and invoices, and acquisition of print monographs and serials
- b) Digital – has overall familiarity with workflows in current system including selection, acquisition, organization, and accessibility and preservation of digital resources
- c) E-Resources – has overall familiarity with workflows in current system including procurement, licensing, and management of all electronic resources acquired by the institution
- d) Fulfillment – has overall familiarity with workflows in the current system including patron registration and management, circulation policies, and calendars
- e) Interlibrary Loan – has overall familiarity with workflows in the current system including lending and borrowing and external resource sharing management applications
- f) Resource management – has overall familiarity with workflows in the current system including bibliographic and authority records, inventory, and local practices
- g) Data Experts
 - i) Acquisitions – has full understanding of the institution's acquisitions data including ledgers/funds, POs, and invoices
 - ii) Digital – has full understanding of the institution's digital repository and data

- iii) E-Resources – has full understanding of the institution’s electronic resources data including procurement, licensing, and management
 - iv) Fulfillment – has full understanding of the institution’s patron and circulation data including patron import, circulation policies, and calendars
 - v) Interlibrary Loan – has full understanding of the institution’s policies for lending and borrowing, profiles for external resource sharing applications, and integration with NCIP
 - vi) Resource management – has full understanding of the institution’s bibliographic, authority and inventory data, and access to external resources
 - vii) Discovery – has full understanding of the institution’s metadata and definitions of what should be discovered and displayed to the end users in Discovery
- 3) Public Services Staff
- a) reviews the end-user systems that are impacted by Alma implementation (Discovery, MetaLib)
 - b) assists in planning the transition from the OPAC or former discovery layers to Discovery

Implementation Leadership

Any library implementation will involve some trauma. People will go from a system with which they are already familiar to one that they are completely unfamiliar with. It is important that they participate as fully as possible in the implementation process. At the same time, we need to have a core group of people involved to make the actual implementation decisions. This will be a balancing act.

I propose the following structure for implementation:

1. Project Manager: Jeremy Brown (with Christian Pham backup)
2. Project Teams
 - 2.1. Team Parameters
 - 2.1.1. Each library maintains a single representative on each team. Each library will likely have a larger corresponding team in house.
 - 2.1.2. Each representative works to create harmony between all three libraries when configuration conflicts arise. We should be able to maintain a good amount of fidelity with our historic site-specific practices, but each site should be willing to compromise with the other two libraries.
 - 2.1.3. The resulting product should give us an environment that has the minimal impact on our daily workflows, but at the same time allows us to take greater advantage of our new automation tool in cooperation with our partner libraries.
 - 2.1.4. Each team representative will have to work within its library to verify faithful implementation of parameters and to verify that data is faithfully migrated.
 - 2.2. Teams (one representative per library)
 - 2.2.1. Acquisitions
 - 2.2.2. E-Resources
 - 2.2.3. Fulfillment — (“circulation” in our parlance)
 - 2.2.4. Interlibrary Loan
 - 2.2.5. Resource Management (“cataloging” in our parlance)
 - 2.2.6. Public Services (for review of public interfaces)