# Georgia Tech and Emory

*Highlights From our Alma Implementations*

*GUGM May 19, 2016 – Macon Ga*

EMORY UNIVERSITY · **Library Service Center** of Emory University and Georgia Tech · Georgia Tech

**Overview: Doug**
Introductions / Hold questions until the end

GT Emory Partnership and Highlights of Our Alma Impelmentations
Implementations
Project Management and Teams
Integrations
Resource Sharing until Fulfillment Network
Where We Are Today
Challenges We Faced
Q&A

**Overview - DOUG**
Resource Sharing decided
Alma to facilitate shared collection
Managing the services in the facility (ties into fulfillment network section)

Background – LSC services agreement, MOU between the presidents, decision documents, decisions on policies and procedures

Timeline - Alma at GT (6 months) – Alma at Emory (2 years) - went live around the same time (December 2015)
Weekly calls and switch to support (dates) Integrate two institutions- how we make it work at LSC – WMB Integration – workflows – fulfillment

**Two Implementations - Separate and Together: Amy and Alex / Stella and Karen**

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**Emory :** Lessons learned from recent implementation. Original plan to have them closer together. Many staff mobilized from multiple libraries 50+ staff. Process mapping, data cleanup – long lead time before ExLibris got involved – lost momentum

**GT:** * Less than 6 month implementation
* No time for data clean up
* Same project management team as Emory
* USG integration later. Clean up UB obligations, etc.
* Moving our collection offsite and moving work processes offsite and needed to configure for those eventualities. Theoretical configurations that needed adjustments. Still making adjustments.
* Few libraries, simple policies
* Offsite management of materials, needed to enable pick from shelf functionality.
* Train the trainer, asked for additional training and training documents. Conducted formal training sessions in the areas of Fulfillment, Acquisitions, and Records management. Ongoing training still in process.
* Fulfillment is more user-friendly and less complex than Acquisitions and Resource Management. Reserves is more complex than necessary.
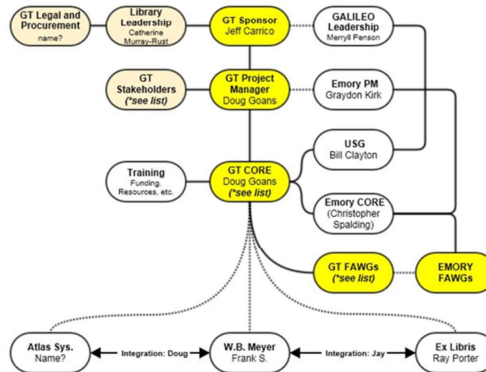* Still working out workflows.
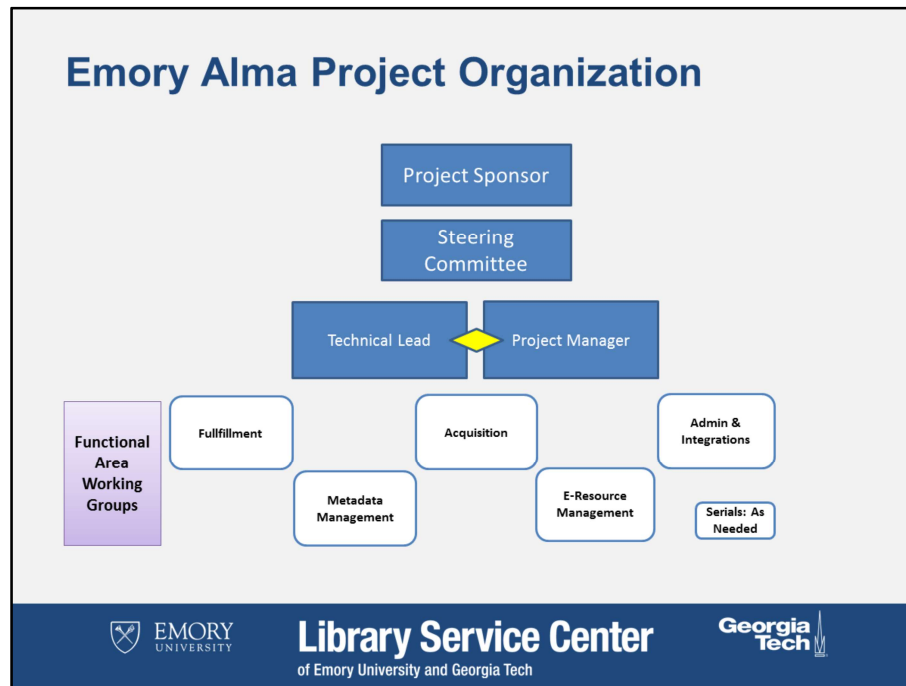
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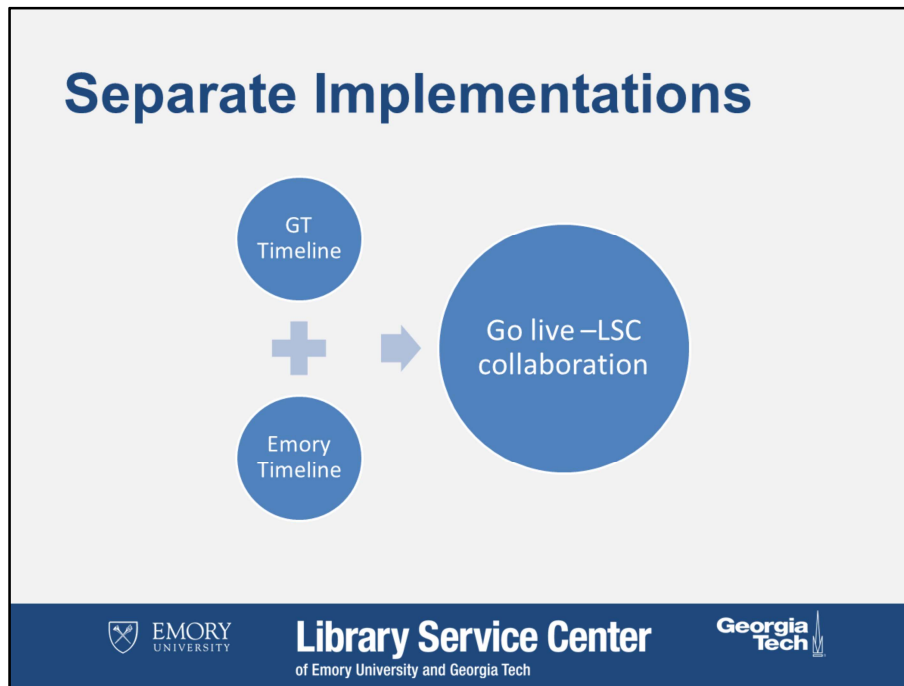
**Two Implementations - Separate and Together: Amy and Alex / Stella and Karen Transitional Slide**

**Project Management Approach: Doug and Ceray**
GT TIMELINE
Dec 2014: Alma pre-implementation began (did not know at this time we were going to do a six-month implementation—potential for later with USG or earlier with Emory)
Early 2015 talks with USG/Emory/ExL re:topology – Q1 2015 – high level meetings
June 18 2015: Tony G – welcome letter – pre-implementation PM—between June 18 and Aug 14 we were in pre-implementation
June/July 2015 initial pre-implementation planning and contract signing – sole source issue late May, early June
Contract signed 6/29/2015 Tony and welcome email > Implementation with Claudia and Chen and Carolyn
August 14 2015: Official implementation kickoff with ExL team
NOTE: Initial meeting with ExL–had to commit time and resources to meet our aggressive timeline and Ex Libris also committed their project team (same team as Emory)
Dec 28, 2015 Go-Live
April 1, 2016 Switch to Ex-Libris Support

Project Management – Doug and Ceray

Our Project Management approach Separate weekly calls with a shared Ex Libris project team (shared with both institutions). Resource Sharing calls we did together – will be working on Fulfillment Network together. MOU to decide what patron data we will share in the fulfillment network

GT FAWGS - weekly calls, FAWG leads
Began by creating working teams (total of 18 people) in 13 different functional working areas to figure out the what, where, and how to focus on those areas.
Create synergy with Emory - they implemented FAWGs- GT included USG representative on their team.

GT FAWG LIST
Fulfillment and ILL, Admin and Integrations, Acquisitions, Metadata Management, Data Cleanup, E-Resource Management, Discovery & Primo, Printers, User Management Roles and Permissions, Analytics/USTAT, Operational Reporting, LSC Integrations, Training & Communications
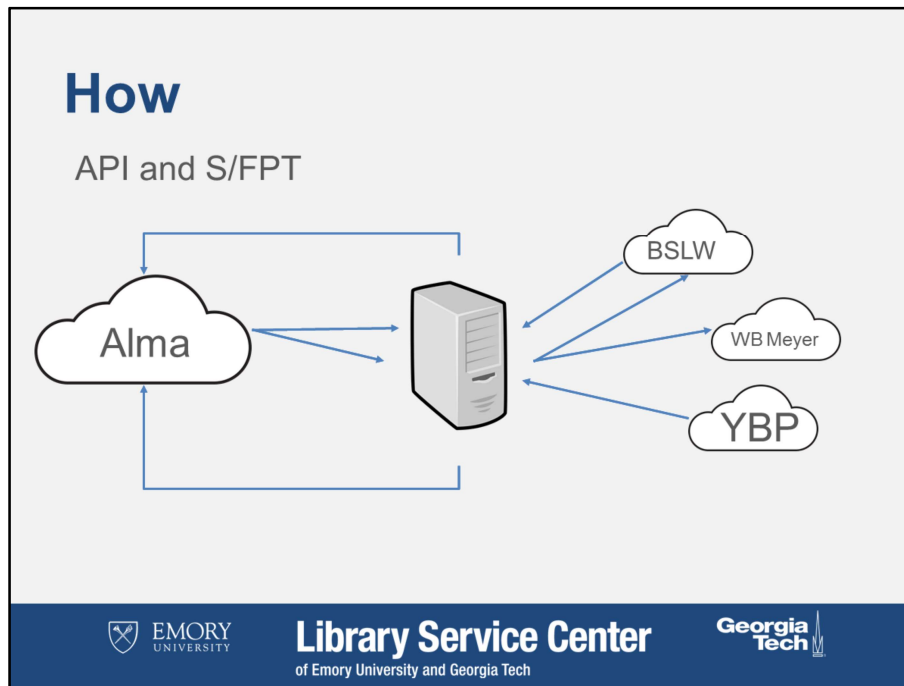
**Integrations: Alex**
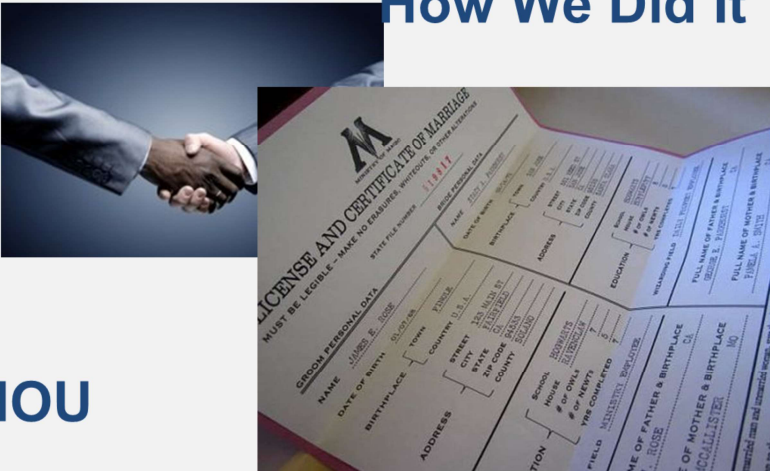
**Integrations: Alex**

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**Patron Data  Sharing MOU--Ceray & Stella**

- Data stewards signoff
  o Registrars
  o Technology
  o Steering Committee
- Collectively decided to share the following:
  o First name
  o Last name
  o Unique identifier
  o Email address

**Fulfillment Network Future Plans: Karen and Amy**
Difference between Res. Sharing and Ful. Networking - requirement, plan for it, timeline, test site/sandbox. ExLibris working to support this – the work will benefit the USG. Protecting patron privacy is part of the MOU

Fulfillment Network shares patron information and creates a temporary record on the lending library. Direct requesting not enabled, this is primarily set up for walk-in borrowing.
Resource Sharing does not share patron information with the borrowing library. You are sharing between the libraries. A temporary item record is created on the borrowing library. It's primarily patron initiated but still requires some staff mediation.
RS=June, in testing, FN=November, with changes we require.
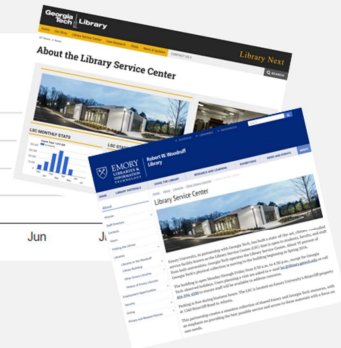
**Where We Are Today: Doug**
Between Dec 2015 - May 2016 Accessioned over 1 million items (March 300,000)

**DOUG**
Challenges – pain points – risks
Being a state institution collaborating with private institution - private/public - GT is HR and Emory is providing IT – patron data sharing
Decentralized/centralized IT models
Buy-in from leadership to set Alma implementation as a priority, day-to-day work impacted in order to get Alma implemented
Communications (current and future)

# Questions?

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**Library Service Center**
of Emory University and Georgia Tech

Georgia Tech

# Thank You

## *Georgia Tech*

- Karen Glover
  karen.glover@library.gatech.edu
- Doug Goans
  doug.goans@library.gatech.edu
- Stella Richardson
  stella.richardson@library.gatech.edu

## *Emory*

- Amy Boucher
  aebouch@emory.edu
- Alex Cooper
  alexander.cooper@emory.edu
- Ceray Doss-Williams
  ceraydosswilliams@emory.edu

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