

Lessons Learned from Migration for Catalogers

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A Freeze Isn't Just One Freeze

Task	Start Date	End Date
Acquisitions Freeze – no orders except rush orders through Amazon	11/20	12/16
Technical Services Freeze - all work in Aleph, Primo, and Alma stops	11/25	12/15
Alma Training Freeze (Production system only - sandbox will still be available)	12/9	12/15
Re-load Aleph Data into Alma NO ALMA ACTIVITY / TRAINING, etc.	12/10	12/10
Emory Signs-Off on Aleph to Alma Data Acceptance	12/11	12/11
Re-load and Re-index Alma Data to Primo (up to 5 days)	12/11	12/15
Circulation Freeze - ExLibris Copies Fulfillment Data Offline transaction process is utilized NO ALMA ACTIVITY / TRAINING, etc.	12/13	12/16
Verify Data Loads and Testing	12/11	12/16
Final acceptance and Go-Live with Alma and Primo	12/16	12/16
Load Offline Circulation Data	12/16	12/17

Included cataloging freeze:

- Catalog offline in OCLC, save to Local Save File
- No spine labels except for rushes
- No vendor record loads
- No authorities processing
- Focus on training in Alma and SpineOMatic (creating marking labels)



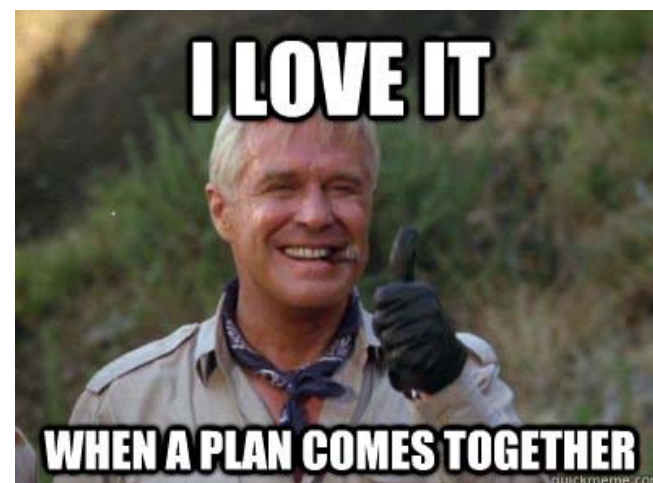
Training Before Migration

Whole-library training

- October-November 2015
- Developed by Alma Project FAWGs
- FAWG = Functional Area Working Group
- Each FAWG responsible for training in its area
- Training calendar (spreadsheet)

Metadata FAWG

- First Alma training session, Searching & Navigating
- Session I: Copy cataloging, Inventory, and the Metadata Editor
- Session II: Advanced Cataloging Functions
- Used Google Forms for coordinating classes



Training After Migration

Weekly Drop-In Cataloging Clinics

- January-February 2016
- Invited all Woodruff Library catalogers
- No agendas - informal knowledge sharing, problem solving
- Helped direct & prioritize my post-migration work
- Occasional “guest stars,” e.g. Core Systems Primo Admin

You probably already know about these resources:

- ExL Knowledge Center: <https://knowledge.exlibrisgroup.com/>
- ExL Alma Training: <http://knowledge.exlibrisgroup.com/Alma/Training>
- ExL Alma Resource Management Guide:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management)
- ALMA-L: <https://listserv.nd.edu/cgi-bin/wa?A0=ALMA-L>



From Training to Documentation

First we used Clarify It - <http://www.clarify-it.com/>

- Individual one-time licenses, \$30
- Private https links that you share, not indexed in search engines
- Can create one page linking to all your guides
- <https://egrant.clarify-it.com/d/emcat>

Clarify It is great, but...
We're complicated!

Emory
Libraries

Woodruff (Main)



Rose (MARBL)



Theology



Law



Oxford



Business



Music & Media



Science Commons



Health Sciences



LSC



Documentation: ScreenSteps

Emory Libraries

- Geographically distributed, different relationships between different libraries, different reporting lines, etc. ...
- Our need = somewhere between knowledgebase and manual
- Desire to collaborate easily online, reuse (not recreate) guides between libraries
- Coordinate similar processes while still allowing for local practices

So... ScreenSteps - <http://www.screensteps.com/>

- Monthly subscription starting at \$49, non-profit pricing available
- Collaborative version of Clarify It (10 active authors, 3 sites)
- Can make private or public, other customizations available
- <http://emory.screenstepslive.com/s/14444>



Cataloging Configurations, Briefly

Lots of configuration set-up for Cataloging Admin

- November-January, with tweaks after that
- Setting up User Profiles...
- Defining local MaRC fields...
- Setting up normalization and merge rules...
 - Need for OCLC Digital Gateway
 - Need separate ones for External Search in MD Editor
- More norm rules
 - Essential for creating import profiles
 - Essential for making bulk changes to records
 - Written using Drools - <http://www.drools.org/>
- ExL documentation and ALMA-L very helpful!!



Importing Bibs

Pretty straightforward!

Digital Gateway

- Out of the box integration with Connexion, Alma admins set up
- Our preferred method of importing from OCLC
- One by one records (F5) or multiples from Local Save File
- Caveat: always gives you success message even when unsuccessful or matches on CZ record

Search External Resources from within MD Editor

- Primary and secondary records are defined as the opposite
- Thus, much more difficult to apply norm and merge rules to get results you want



Import Profiles, Briefly

January-March, again with tweaks afterward

Woodruff has a lot of outsourced records, so key for us

- Shelf-ready (firm and approval)
 - EOCRs and final bib import profiles
- McNaughton (Woodruff and Science Commons)
- Outsourced cataloging: DVDs, Spanish/Portuguese, Music scores
- eBooks
- DDA (to come)

Import profile components

- Merge rules, match criteria, normalization rules, inventory mapping, FTP set-up...
- =A lot of initial set up, but automates much manual work!

Emory naming conventions – by library (UNIV – YBP Firm Shelf Ready)



Work Orders for the Perplexed

Metaphor #1: Playing catch

Start with very few & keep them simple

- You can always add more later!
- Don't put every possible status in one department

Begins with receiving in Acquisitions

- If "Keep in department" box checked
- Creates Tech Services work order (In Cataloging)
- Items show up as Unavailable (checked out) in Primo

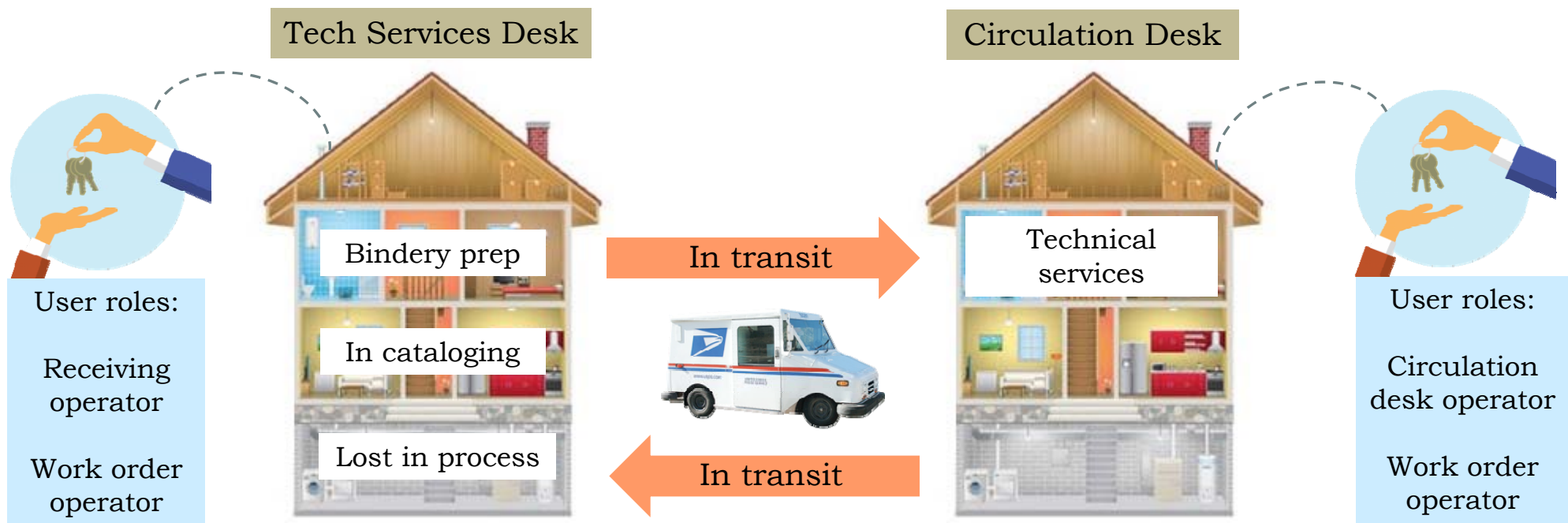
Increased workload for spine labels from 1 to 3 scans

- Scan out of Tech Services
- Scan into SpineOMatic to print label
- Scan into Circ Desk to show up as Available



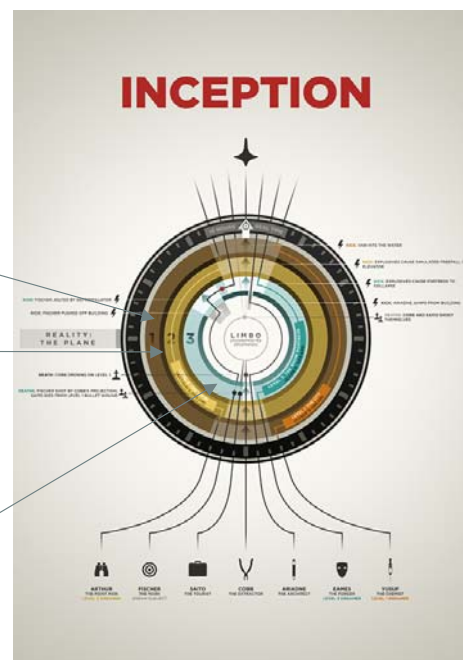
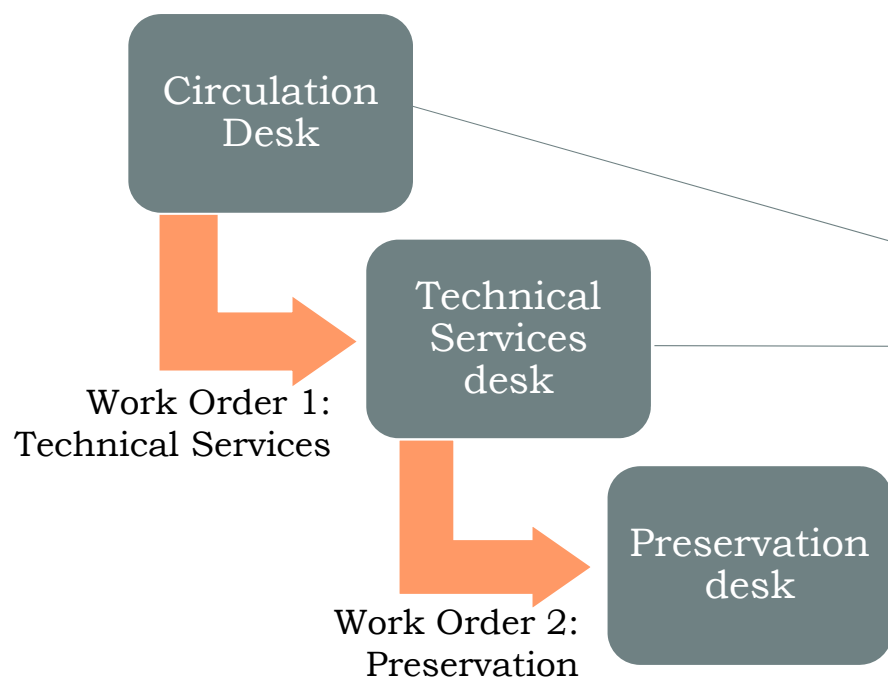
Work Orders for the Perplexed

Metaphor #2: Houses



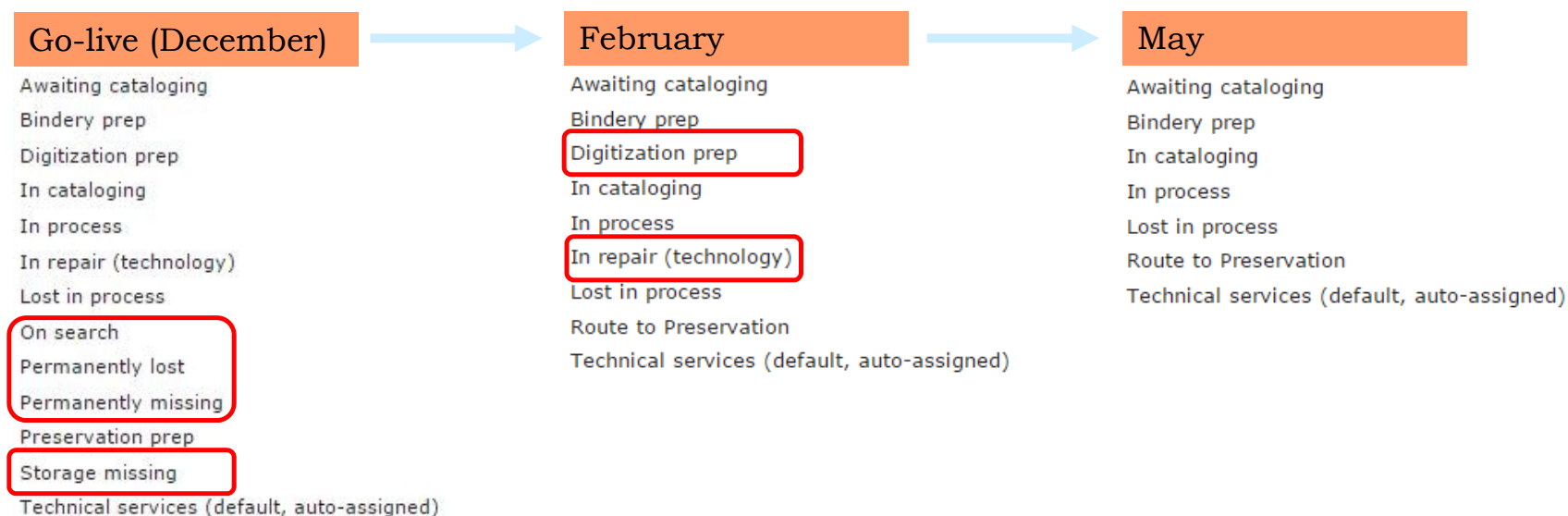
Work Orders for the Perplexed

Set up sparingly - they can turn workflows into *Inception* (work orders within work orders)



Work Orders for the Perplexed

- Start small and simple! You can add more statuses and departments later on
- Don't try to combine every single function possible into one department's work orders.
- Initially, we created too many Tech Services work order statuses that we just didn't need:



Other Random Things I'll Mention

Macros don't work as well with Alma

- Hard to control buttons and menus with macros
- Monthly releases can break position-based macros
- Kathryn Lybarger from UK has a great ELUNA presentation on alternatives
 - Bookmarking from within Alma (MD Editor, etc.)
 - Using browser extensions in place of macros

Alma UI redesign coming soon (announced at ELUNA)

Analytics

- A bit intimidating/time consuming to learn
- Not *currently* as much flexibility as Access and tables
- But can use them with APIs!

API all the things!

- ExL Developer Network: <https://developers.exlibrisgroup.com/>



Images

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Alma

WHERE THE BEST PRACTICES TEAM IS AT!

WHAT HAS HAPPENED

- ✖ **Vanguards: Valdosta, Georgia Southern, UGA**
- ✖ **Round 1: Pre-Migration Data Cleanup**
 - + Local Data
 - + Bound withs:
 - + Withdrawn
 - + Duplicate OCLC Numbers
 - + Duplicate Bibs
 - + Bibs without holdings
 - + Nonbarcoded Item Records (removed)
 - + Decoupling of Composite Records (begun)
 - + Other

WHAT HAS HAPPENED CONTINUED

- ✗ Round 2: Testing to Migrated Data
 - + Alma suggested
 - + Local
 - + Kubik
- ✗ Learning (and correcting) from our mistakes
 - + Profile configuration
 - + Legacy data (unknown until post-migration)

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- ✖ Round 3: Primo
 - ✖ Primo arrived a few days ago (Monday for Valdosta)
 - ✖ It might look right in Alma... but why isn't it showing up in Primo?
 - + Out of the box functionality not turned on?
 - + What works in Voyager does not Work in Primo

THINGS TO THINK ABOUT

- ✗ Whole new set of terminology
- ✗ Old practices will have to be abandoned
- ✗ UGA Institutions have varied ways of doing things – some work better than others
- ✗ Training needs
 - + Better documentation