

What to Expect When You're Expecting Alma+Primo

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Gordon Coleman, Head, Resource Acquisition, Management, and Metadata, Simon Fraser U
Heather D'Amour, Director, Content Development (Acquisitions & E-resources), U Calgary
Frances Dodd, Systems & Technical Services Librarian, Simon Fraser U
Heather Ganshorn, Director, Science and Engineering, U Calgary

1. Background: Pre-Alma setup

Technology Stack

SFU:

- Millennium ILS
- Summon Discovery
- CUFTS Knowledgebase and ERM
- Digital collections (Islandora)
- Institutional repository (DSpace)
- Archives (AtOM)
- ILL (Relais)

Other relevant details:

- CUFTS KB maintained for 25+ libraries across BC and around Canada

U of Calgary:

- Sirsi ILS
- Summon Discovery
- Verde (ERM)
- Serial Solutions:360 link & Knowledgebase
- Digital collections (ContentDM), institutional repository (DSpace), archives (AToM)
- Relais ILL (integration “in process”)
- Ares reserves (not integrated)

Organization: UCalgary part of small Consortium, plus has a Qatar campus (Nursing)

2. Pre-implementation phase: how did you prepare for the change?

Preparations - Key Points

SFU:

- Coordinating team
- Formal change management process for staff (ADKAR)
- Retirement incentive for eligible CUPE staff
- Data clean-up - never enough!
 - Locations
 - Patron types
 - Loan rules / circ policies
 - Holdings records, etc.
- Snapshot including non-migrating data

U of Calgary:

- Steering Committee,
- University assigned Project Manager and Business Analyst
- Pre-implementation Teams
 - Data clean-up - limited
 - “Blue sky” discussions
 - Streamlined Fines, loan periods, auto renewal, access policies and user groups
 - Locations cleanup/reduced
- Consortia Libraries & Qatar Campus
 - Consultation, planning, prep for libraries

3. Implementation phase

- Alma Migration and Training
- Alma Integration with other systems
- Planning for Primo

Alma Migration and Training

- Training (Train the trainer approach to learn core functions: search titles, understand and monitor workflows, normalize and filter records, manage sets, etc.)
- Data evaluation and cleanup, migration and configuration sheets
- Testload and sign-off

Key Integrations: Alma with other systems

SFU

- Day one:
 - Student information system import (PeopleSoft), Campus authentication (CAS), ILL (Relais), External Resources Search (OCLC), Self-Check (3M)
- After a few days to weeks:
 - Monographs ordering (Coutts), EDI invoicing (Coutts, Ebsco), Reserves (Leganto)
- Not implemented yet:
 - Campus financial system integration (PeopleSoft), EDI order status reports, OCLC holdings load

U of Calgary

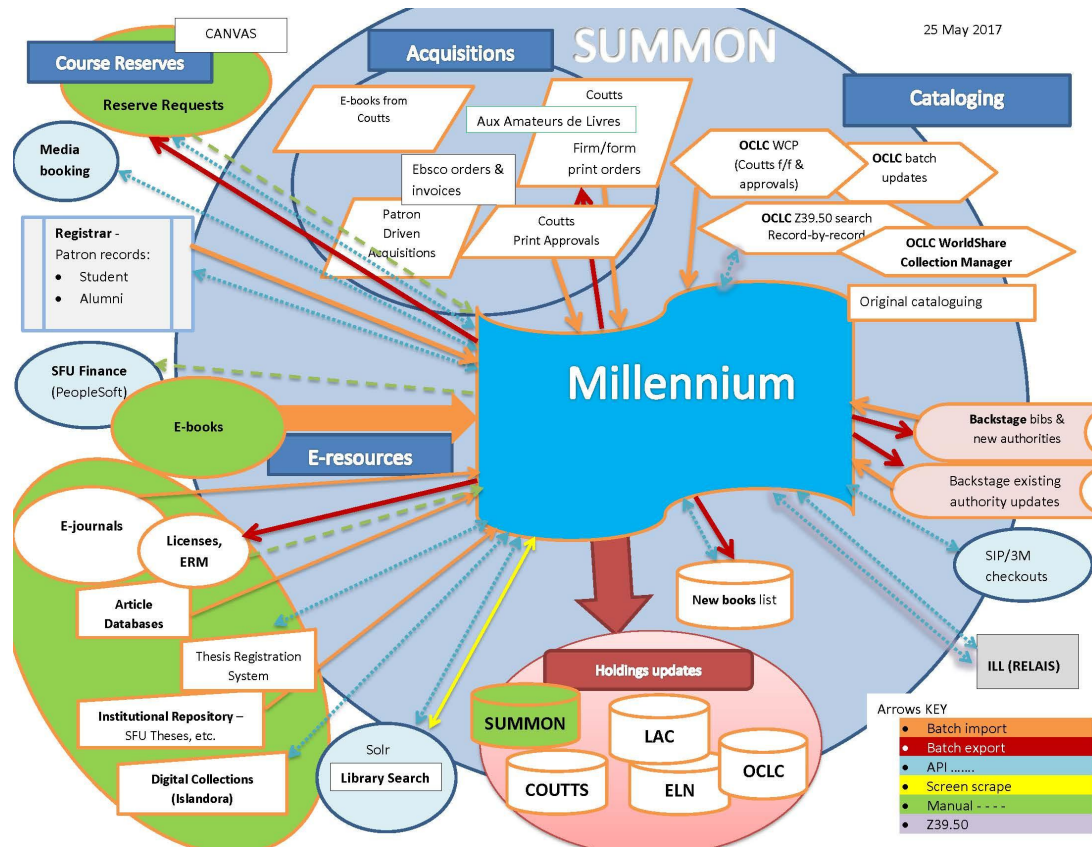
Integrations/Interfaces:

- LDAP, UNICARD,
- Peoplesoft (no EDI invoices yet), Online Fines payment, Self Checks, Receipt Printing
- Relais (going thru UCIT security review, SAML)

Not Integrated:

- Ares (reserves)
- The Museum System

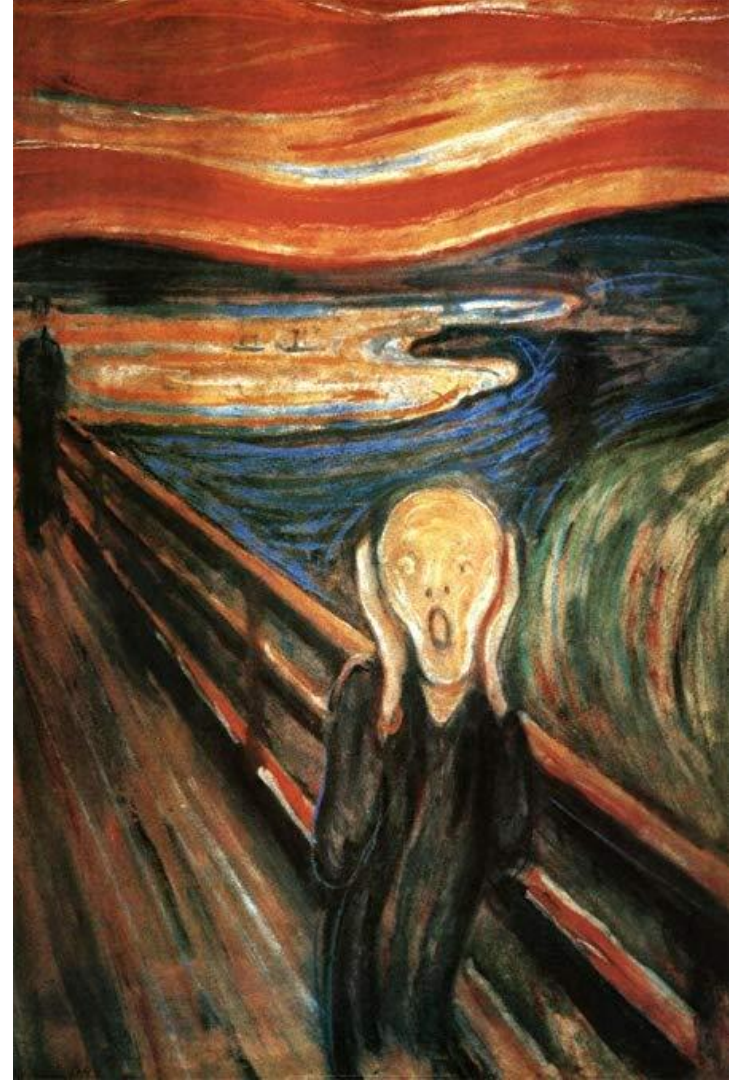
Simon Fraser University



Planning for Primo

- Public service staff engagement
- Learning Primo Back Office
- Configuring discovery
 - Primo NUI vs. Primo VE, normalisation rules
 - Primo Central Index (collections workflow)
- Integrations with Primo
 - SFU bento box (includes digital collections, IR), OAI-PMH for Abacus
 - U of C archives, special/digital collections, repository - OAI-PMH harvest

4. Go-Live day



Go-Live

- Launch date:
 - SFU: May, delayed one day
 - Calgary: May, postponed to June 20
- Preparations: communication to users? Staff training
- How did Go-Live go?
- Response from students, faculty, and staff

5. Impact on workflows and staffing

Workflows and staffing

- Empowerment
- Distributed control
- Need for new skills: Primo + discovery expert
- Change in metadata work, reliance on shared cataloguing and the Community Zone
- Embracing new ways versus clinging to old ways

SFU

- Transformation of Tech Services staffing model and roles

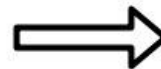
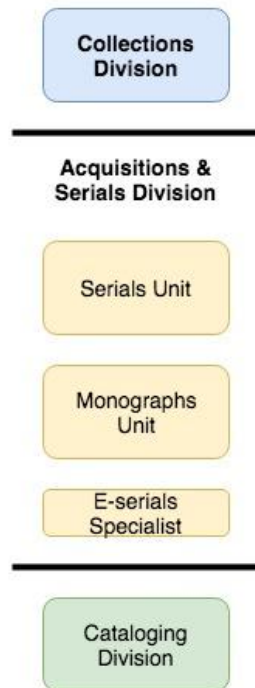
U of Calgary

- Too soon to see changes with staffing models
- We're hiring a systems librarian!

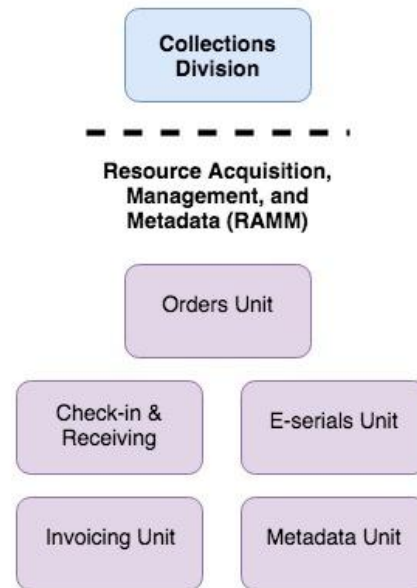
Changes in SFU tech services org structure

- From a format-specific model to a (mostly) workflow based model
- One division merged
- Fewer unique job descriptions, more shared work
- Several retirements not refilled

Pre-Alma Structure



New Structure



6. What are your greatest ongoing challenges?

Challenges

- Cloud - loss of control for system upgrades, currency exchange rate, etc
- UofC - retirement of systems librarian
- Unified Discovery - articles vs. books; opaque results
- Community Zone - slow to update; poor quality records
- Discovery service rivalry between vendors - we need to see better adherence to NISO's [Open Discovery Initiative](#)
- Planning for Fiscal Year End after migration

7. What are the greatest benefits?

Benefits

- Cloud - continuous improvement; no local maintenance
- Unified Discovery - single tool for research
- Community Zone - shared metadata, staffing efficiencies
- Opportunity to transform staffing model and work culture
- Modern features in many areas: ERM and Acquisitions truly integrated, Analytics, etc.

Questions?