

TOWARDS A PRAGMATIC SYSTEM MIGRATION

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Outline

- My Alma migration journeys
- Alma – quick overview
- Migration process
- Communication during migration
- Training

My Alma migration journeys

- CUNY – migration from Aleph (for a consortium with 22 campuses)
- Brown – migration from Sierra

Alma – Quick Overview

- Library services platform
- Cloud based system

Library Services Platform

- Unifying management of print, electronic and digital content into a single platform
 - ▣ Incorporating previously separated functions (e.g., ERM, digital assets management system)
- Ability to handle multiple metadata models (e.g., MARC, DC, BibFrame, etc.)
- Supporting procurements of purchased, licensed and open access resources
- Robust reporting system for deep data analysis and visualization
- Integrated (or separate) discovery service platform

Cloud Based System

- Can access from any computer, anywhere with an internet access
- Deploy regular upgrades on the cloud (currently: quarterly)
- More open for third party integration

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Migration Process

Migration Preparation (for Technical Services)

- Form a team of TS experts
 - ▣ Handling migration of legacy data
 - ▣ Managing transition of legacy practices
 - ▣ Local data to preserve or let go
- Utilize relevant migration documentation
 - ▣ Vendor's documentation
 - ▣ Documentation from peer institutions
- Identify/plan pre-migration clean-up/tasks
 - ▣ Vendor's documentation
 - ▣ Advice from peer institutions

Migration process

- Pre-migration
 - ▣ Data Extraction – what/how
 - Bib/Hol/Items/order/vendor/circ (records/data in records)
 - ▣ Data Mapping
 - ▣ Test load
 - Data review
 - Adjust data extraction/mapping strategies
- Production (Cutover) load
 - ▣ Data review
 - ▣ System configuration (done before/after migration)

Migration Process (cont'd)

- Post migration
 - ▣ System configuration – continuous
 - ▣ Workflow redesign
 - Learn/understand/make use of system features
 - Iterative process (learn, adjust and refine)
 - Opportunity to move towards a more efficient workflow
 - Consult (almost constantly) documentation, colleagues, peer institutions for best practices
 - ▣ Post migration clean up
 - Identify data to be cleaned – on-going
 - Develop strategies and set priorities

Communication

- Who
 - ▣ Identify audience
 - Technical Services staff
 - Library staff
 - Campus community
- What
 - ▣ Content
 - all library staff – high level migration progress and status
 - Technical services – detailed, more specific (e.g., data migration process, timeline)
- How
 - ▣ Email
 - ▣ Regular meetings

Examples

Communication with TS staff

CUNY - Aleph Item Process Status

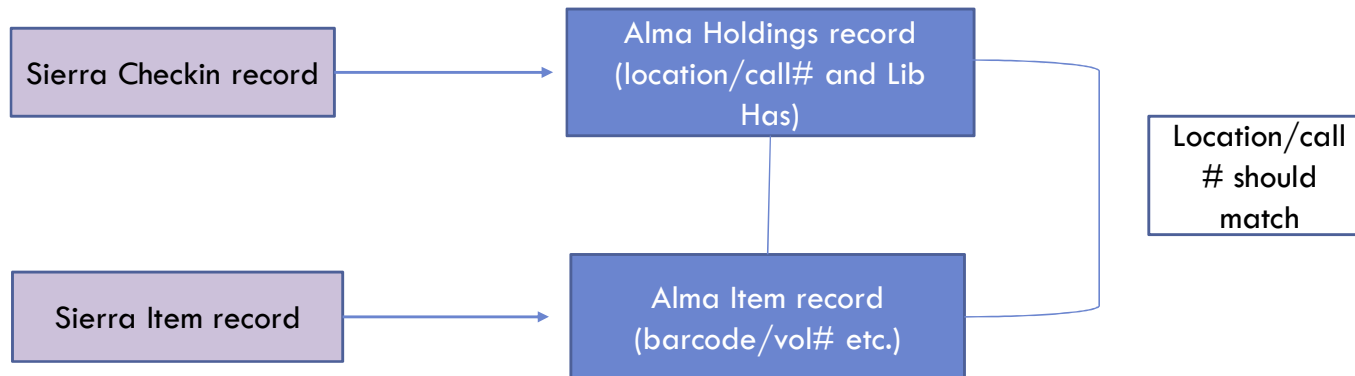
- IPS will be migrated to an item note in Alma (Internal Note 3). These items are considered “not available” after migration when process = Technical – Migration. (from ExLibris Knowledge Center)
- *Loan, On hold shelf, and On Order* inventory records have exact analogous statuses in Alma and those process statuses will migrate when related loans and orders link to them.
- Other status will have no equivalents in Alma and a TECHNICAL status is attributed to them so that they can be identified and managed in Alma.
- The only situation in which an item can receive ACQ status in Alma is when an item is a future serial with prediction and it is connected to an active order.

CUNY - P2E (Print to Electronic)

- In Alma, for the migration programs to change physical resources into electronic resources, you have to identify/indicate which resources to change from physical to electronic (P2E).
- At CUNY, ILS *libraries and/or locations* that represent electronic inventory are used to allow sub-identification (for cases where there is physical and electronic material linked to the same BIB) based on the BIB input file received.

Brown - Migrating Sierra Checkin Records

- In Sierra, checkin records become MARC holding records when they are migrated to Alma

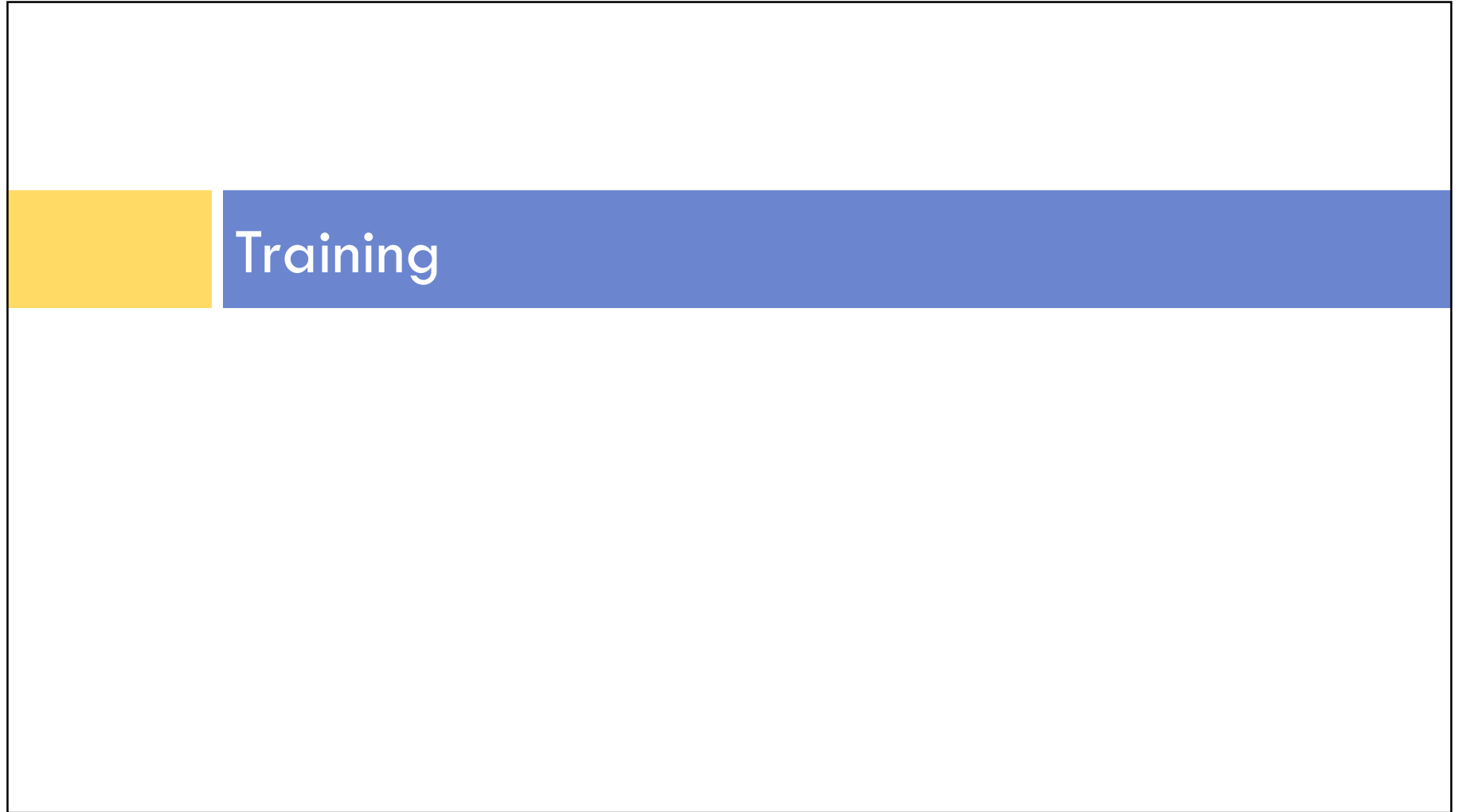


Brown - Item Barcodes

- Sierra allows item barcodes to be duplicates. Alma does not. The item barcode must be unique in Alma, but it may be left empty.
- The item barcode is migrated according to the following:
 - ▣ If the barcode is empty, it'll migrate as empty.
 - ▣ If the barcode exists but is not unique:
 - First item barcode encountered – migrate as is.
 - Second and subsequent item barcodes encountered – migrate as
 <item barcode>-<item id> (312xxxxxxxxxxx-ixxxxxxxxx)
 - The final checkdigit of the Sierra item id (for example, i123459) are removed, so the migrated item id is i12345.

TS activities timeline and Alma Migration (June – August)

- Acquisitions/Cataloging activities
 - ▣ Ordering
 - From vendor ends May 28
 - Using pard ends June 15 (for rush only)
 - Fiscal close on June 28
 - July 5 – Aug. 17 - Rush orders only (data will be manually entered in Alma after Go Live)
 - ▣ Cataloging freeze June 25 (no cataloging activities until Go Live)
- Sierra data extraction/manipulation June 28 – July 26
- System technical (acq/cat) freeze – July 19 (Brown Alma not available until Go Live)
- Possible local training and practice – June 28 – August 13
- Go Live – August 17



Training

- Realistic mindset – trainer and trainees
- Understand the learning process
 - ▣ Learning by doing
 - ▣ Visual
 - ▣ Sequential
- Develop a system
 - ▣ Instruction + hands on
 - ▣ Training for Day 1 tasks
 - ▣ Continuous training (e.g., weekly discussion, show and tell)

Trainer

- Allocate time to learn the new system
- Practice, practice, practice

- Identify Day 1 tasks and learning goals
- Prepare training materials
- Preferably with hands-on exercises
- Develop training logistics (dates/time, location, in-person or virtual)

Training

- Training for related configuration and preparation
 - ▣ E.g., exporting records (from OCLC), importing records (from Alma)
 - ▣ Record overlay – How

Becoming Alma Certified

- Why
 - ▣ Better understand Alma back-end features
 - ▣ Can better utilize system features
 - ▣ Can better control TS features (e.g., batch imports/export, batch jobs)
- How
 - ▣ View short videos in all Alma functions
 - ▣ Answer questions
 - ▣ Review videos/questions
 - ▣ Take virtual certificate exam

Thank You!

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