
IMPLEMENTATION, LOOKING BACK: GOOD AND BAD

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BACKGROUND

- UConn Library has a bib database of 2.5 million records and, at the time of the migration, about 95 staff
- Previous system was ExLibris Voyager (15+ years) with Summon for discovery
- Go-live with Alma & Primo: July 13, 2015

GOOD: THE DATA MOVE

- Thanks to a combination of ExLibris skill and flat-out good luck, we did not have major data issues(!)
- Remember: Only YOU are responsible for verifying the correct transfer of your data (not ExLibris)
- Your data will simply *look* different – it's in a new package – which helps you spot problems
- Big problems will likely appear sooner rather than later
- Minor scares were handled appropriately
 - Vendor records: Manual fix in Alma
 - Item records: Batch fix in Voyager
 - Patron alternative identifier: Batch fix in Alma
- There *will* be cleanup!

GOOD: STAFF ENGAGEMENT AND PRE-GO-LIVE COMMS

- Work, and keep working, to engage library staff: “Cool new toy!”
- Give staff the opportunity to get in Alma ASAP and do some learning
- Communicate through multiple venues: email, all-staff or smaller team meetings, tools such as Slack or Trello
- You can’t communicate too clearly or too often
 - Change, change, change
 - Successes, progress, win some/lose some
 - Facts and honest assessments
 - Keep it light!
- Staff will want to know how the project is going: Tell them!

GOOD: SET REALISTIC GOALS FOR DAY 1

- There is no way to master all of Alma's intricacies by go-live, so don't go crazy trying
- Library staff should be able to do the work in Alma that they spend most of their time doing -- for example:
 - Circ can check books out & in, understand patron records, be able to collect fines
 - Cataloging can catalog, manage physical & electronic inventory
 - Acquisitions can create PO lines, create invoices, understand vendor records
- All basic Alma configurations and integrations are correct
 - Outliers will turn up eventually
 - This is one thing you work on with your ExLibris implementation manager prior to go-live
- All staff should know how to report problems – designate a reporting tool

BAD: PROBLEM TRIAGE AND POST-GO-LIVE COMMUNICATION

- We did have a mechanism for staff to report problems, and people did use it, so that was good – BUT:
 - We did not have a clear priority list for triage of those problems
 - We did not effectively communicate activity on problems and resolutions
- We were really busy! (NOT an excuse.)
- Most people appreciated the work the implementation team was doing, which made me feel guilty
- Overall, our communication fell into a black hole

DO IT BETTER: PROBLEM TRIAGE AND POST-GO-LIVE COMMS

- Prepare a list of priorities for Day 1/Week 1 triage – for example:
 1. Issues that are public-facing and actively interfering with patrons' work
 2. Issues that are actively interfering with basic staff work
 3. Everything else (with more ranking, or else in the order it was received)
- Have a management tool (e.g. Trello) all staff can monitor
- Communicate the triage priorities and Trello URL to all staff
- Designate one person the Communicator; this person handles all the Day/Week 1 information flowing to/from the implementation team, including Trelloing, while the rest of the team manages troubleshooting
 - if possible, this person should be on the team from the beginning
- Keep the larger implementation communication flow going as well

BAD: FUNCTIONALITY INERTIA

- System migration means a new interface, new functionality, new vocabulary: lots of changes for people to process and assimilate
- We tried a mantra: “Do it the way Alma wants it done”
- In many areas, we didn’t do a good job of adapting to Alma, adopting new functionality or re-visioning workflows
- Several instances of workarounds to copy Voyager workflows
- Remaining paper-based workflows did not transition well to Alma

DO IT BETTER: FUNCTIONALITY INERTIA

- There probably isn't a way to do it better. This is difficult.
- Treat migration as an opportunity – for example:
 - To clean up historical messes
 - To rationalize and/or standardize proliferating policies, procedures, reserves checkout periods, physical locations, etc.
 - To improve on the present without denigrating what has been done in the past
 - Learn to say “That’s the way Alma does it!” with a smile
- Do the best you can to “do it the way Alma wants it done” and write on your calendar that you’re going to revisit your post-migration workflows in one year
- Make a list of new & cool features to implement, and when the go-live dust settles, start implementing!

BAD: PRIMO

- We did not prepare user education/subject liaisons for the disappearance of the Voyager OPAC
- We did not think of the staff impact of moving all library searching to discovery
 - Most were not using Summon
 - A change in the experience of known-item searching
- We didn't work hard enough to engage user education/subject liaisons with Primo during implementation
- We didn't do a great job of informing our patrons about the change (we did...okay)

DO IT BETTER: PRIMO

- Put as much emphasis on Primo as you are putting on Alma
- Engage a couple of champions: discovery fans or colleagues willing to work on selling Primo to their friends
- Prepare guides to help both staff and public searchers transition from the library OPAC to Primo's browse and keyword searches
- Take staff training seriously
- Work on improving single-box keyword searching
 - Boosting local resources
 - Indexing more MARC

EXTRA BAD: LETTERS AND PRINTING!

- We left letters and printing until the very end – DON'T!
- As far as is practicable, clean up the letter XML &/or the constant data beforehand
- Do not send every letter there is!
 - Work with ExL to identify the ones you *need*, that will be triggered at the correct points in your workflows (overdues, lost materials)
 - Disable the rest! You can always re-enable them later
- Expect the unexpected: for example, the first run of the overdue/lost fine/fee jobs will send letters to every user with a fine in the system, even if the fine has been cleared externally (that is, we had a lot of fines in the db that we had never been notified were paid, and thus never cleared)
- Have your IT group understand and accept how printing works in Alma, and be ready to implement

THANK YOU AND GOOD LUCK!

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