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Jennifer K. Matthews
matthewsj@rowan.edu, matthewsj@rowan.edu

Christine Davidian
Rowan University, davidian@rowan.edu

Author ORCID Identifier: 0000-0002-0213-9132

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Migrating to Alma Without an Acquisitions Staff: Evolving Acquisitions and Electronic Workflows From Their Legacy Silos

Jennifer K. Matthews, Rowan University

Christine Davidian, Rowan University

Abstract

When the decision was made to migrate to the Alma integrated library system, Rowan University Libraries had an Acquisitions Department and a moderate understanding of how this migration would occur. With the official announcement of the migration to Alma, the entire Acquisitions team announced their retirement shortly thereafter. While Alma provided the library with an opportunity to reevaluate workflows and collaborations, this was a curveball that no one was expecting.

Additionally, many resources were not traditionally tracked in Voyager, the previous library management system, but were tracked in Intota, the previous electronic resource management system. However, these resources would now be tracked in Alma for a variety of reasons. This added another layer of complication to the retirements that occurred and the implementation that was well underway.

This paper will discuss how Rowan University Libraries has managed the Alma migration without the historical institutional memory of the former Acquisitions team. It will also examine how the libraries have examined workflows anew as a result of both the migration and these vacancies, and how Rowan University Libraries has taken advantage of these expanding opportunities since the beginning of the migration until and through the go-live date to account for these new integrations.

Migrating from one library management system to another can be difficult even under the best of circumstances. With each system, there are new nuances to learn, data cleanup to manage, system integrity to maintain, and new processes to master. A migration to a new system becomes infinitely more complicated when a critical department decides to retire en masse prior to the implementation of the new system as the retirees take years of collective knowledge and past practice with them.

For Rowan University Libraries' migration from the Voyager integrated library system (Voyager integrated library system, n.d.) to the Alma cloud-based library system (Alma library services platform, n.d.), the announcement was met with a mixture of excitement and great trepidation. Ultimately, that trepidation turned into a decision for the existing library Acquisitions Department to retire at the end of 2018 just prior to the onset of the Alma training and implementation. This paper will address Rowan University Libraries' migration journey without the presence of their Acquisitions team and the opportunities and challenges that this presented.

Background

Rowan University is located in Glassboro, New Jersey and is a rapidly growing, R2 Carnegie classification institution (Rowan, n.d.). Founded in 1923, the university currently numbers over 19,000 students, both undergraduate and graduate, and includes two disparate medical schools, allopathic and osteopathic (Rowan, n.d.). Rowan University Libraries has a very traditional structure within Technical Services with a director over the department and individual units within the division including Acquisitions, Cataloging, Electronic Resources and Serials, and Collection Management. Additionally, there is a Collections Committee that is formed of members from the three library locations—Glassboro, Camden, and Stratford—for the purpose of determining purchasing decisions.

Over the last several years, there have been many instances when institutional knowledge has been unintentionally lost in the Technical Services area. The institution went through many changes in the 1990s with the \$100 million gift from Henry Rowan (From normal to extraordinary, n.d.). As part of these changes the institution transformed from Glassboro

State College, a normal school, to Rowan University with the creation of an engineering college and the addition of two disparate medical schools in 2012 and 2013 (From normal to extraordinary, n.d.). Many of the staff that currently work in the Rowan University Libraries came on board just before or during this time period. In the technical services area, the long-standing director of 20+ years, Nick Yovenello, died quite suddenly in 2012 following a traffic accident (Six, 2012). Naturally, this left Technical Services in a state of turmoil as they came to terms with this sudden loss. His eventual replacement left 18 months prior to the Alma migration for another job opportunity and though they requested processes be documented, errors occurred. After both of these departures, it was determined that there were some gaps in necessary documentation and various individuals throughout the team were working to fill these gaps, but no one was prepared for the next set of departures.

Acquisitions Retires

Upon the announcement that Rowan University Libraries would be migrating to the Alma system, the mixture of reactions among the Technical Services division began. Some people were excited about the new possibilities that could come with Alma and others, specifically the Acquisitions Department, were vocally upset about coming events. Within days of the announcement, both members of the Acquisitions team declared their intent to retire by the end of December 2018. While both individuals had certainly earned their retirement, this would now mean extensive changes ahead for the libraries in both technological and human capacity areas.

Even before the Alma migration, these retirements meant determining what to do about Acquisitions, but a decision was made by library administration to only hire an interim employee and have the Collection Strategy librarian assume many of the acquisition responsibilities. This decision was made, in part, because the library administration wanted to monitor how workflows changed with Alma prior to hiring new individuals for Acquisitions. Accordingly, the part-time employee was trained to finish out the fiscal year in Voyager and assist with transfer of knowledge from the retiring Acquisitions staff to the rest of Technical Services, and the Collection Strategy librarian served on the Alma implementation team and learned the acquisitions aspects for the new system.

Life After Retirement

January 1, 2018 arrived and along with it came the implementation of Alma. As the implementation progressed, it was clear that many processes had not been clarified prior to the Acquisitions team's retirement. For example, not everyone on the new Acquisitions team—the interim employee and the Collection Strategy librarian—had access to essential e-mails, vendors were still e-mailing the retirees because they had not been updated about the changes in employment, subscriptions lapsed because e-mails continued to be sent to the previous directors, and vendors only called the retirees rather than update e-mail accounts. There were general on-campus process problems such as vague documentation left behind by the former Acquisitions team and their predecessors. Additionally, leadership at the medical schools changed during this same time period, which added to the complications of the overall process.

Voyager vs. Alma

One of the reasons Rowan University Libraries decided to move to Alma was the ability to track physical and electronic resources in one application. With the Voyager system, the libraries were only tracking print monographs and serial titles and using Intota (Intota, n.d.) to track their electronic resources. As the process progressed, the new Acquisitions team decided that it was time to determine new roles and responsibilities in light of the Alma processes. Therefore, the Collection Strategy librarian worked closely with the Electronic Resources and Serials librarian to examine the previous workflows in Voyager and Intota to determine what did not work well. Once this was completed, an analysis was made to compare this to the new workflows in Alma and the implementation team's expectations to see if the workflows were both improved and manageable.

New Opportunities

Voyager's infrastructure is very siloed with each module working mostly independently of the others. Conversely, Alma is very dependent on acquisitions and the workflows that surround it. As a result, the Collection Strategy librarian and the Electronic Resources and Serials librarian teamed up to ensure that the Technical Services division had a basic understanding of acquisition processes, terminology, and how aspects such as ledgers, purchase order lines, and purchase orders work within Alma.

Because much of the electronic resources was not tracked in either Voyager or Intota but would be tracked in Alma, it was essential for everyone to understand who was responsible for which aspect in the workflow from initial order, to activation, to invoicing. The Alma migration also gave the libraries an opportunity to restructure several processes, as “it’s always been done this way” was no longer relevant. Additionally, it was determined that the ledgers would be entirely rebuilt for fiscal year 2020 to better reflect the new processes, and greater integration was developed for cataloging and ordering between the two medical schools and the main campus, which provides greater unity to the overall institution.

Beyond Alma

The Alma migration has also opened opportunities for the libraries to explore technologies and developments that heretofore would have been impossible due to the library’s available staff size in Technical Services. Through Alma, Rowan University Libraries is now able to integrate e-book purchasing and invoicing APIs, implement automated electronics resources

holdings management, anticipate coordinating a synchronization with the university Banner system, ingest vendor licenses, and can more easily centralize services for all three campuses. These new services ultimately allow the libraries to better serve our patrons than was ever possible using the Voyager/Intota combination.

Migration Accomplished

Though we would never recommend the retirement of an entire department prior to a migration, particularly the Acquisitions department, it can be accomplished. By collaborating with others in technical services, the Alma implementation team was able to determine new workflows and processes that were inhibited by prior practice. While it should be standard practice to document procedures, it also should not prevent a team from taking on a relevant task as the collaboration will make it more manageable. The new workflows and processes that developed out of these discussions throughout the library and the department have made the overall Technical Services team much stronger.

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