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Let's Get Technical — Migrating to Alma Acquisitions: One Library's Experience

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Column Editor Note: *In this issue's column, we feature the experience of one library's migration to a new ILS. Rob Tench, Acquisitions and Preservation Services Librarian at Old Dominion University, describes how his library migrated to Alma. — SM & AM*

Introduction

In 2016, **Old Dominion University Libraries** migrated from **Innovative Interfaces Inc.'s** Sierra to Alma from **ExLibris**. A seamless transition to the new system by Acquisitions staff was considered essential for a successful Library-wide migration. Among the many challenges, staff were learning new terminology, migrating data, importing records, working with vendors, establishing new procedures, and creating efficient workflows. As could be expected, some things went well while others remain a work in progress.

Situation

Old Dominion University is a public university of approximately 25,000 students located in Norfolk, Virginia. It offers 70 bachelor degrees, 54 master's programs and 42 doctoral degrees. More than 100 programs are available online. University Libraries supports these programs with a collection of 1.2 million monographs and subscriptions to 14,000 journals and 300 electronic databases. For years, University Libraries used several versions of integrated library systems from III but selected Alma to replace Sierra in late 2015 after a seven-month evaluation of vendors and products. An Alma Implementation Team was created to coordinate and to lead the migration. The eight-member Team represented all library departments including administration, bibliographic services, circulation, reference, and systems. The Library's Acquisitions Coordinator was a member of the team. The team's charge was daunting: complete implementation in six months.

Pre-Implementation Problems

The Alma Team quickly created a workable timeline and agreed on member assignments. The Acquisitions Coordinator was tasked with completing acquisitions portions on an Alma field mapping and migration form, and after an initial Alma load of test records, testing order and vendor records in the Alma sandbox as well as reviewing fund codes and ledgers. What the Acquisitions Coordinator soon discovered after test load completion was that order records in Alma were much different and more complex than Sierra order records. For one, Alma records were vendor driven and required different and more specific data than Sierra records. Moreover, the fields and terminology used for Sierra order records did

not match the fields and terminology of Alma order records. In general, gathering of data information in Sierra to evaluate needs in Alma was problematic because of the short window of time to complete implementation. To expedite and to help with the process, all technical work in Sierra was stopped so that the Alma Team could collect and migrate data to Alma. However, not having a system for an extended period while Sierra was shut down and Alma was not activated became an impediment to Acquisitions workflow because so much of its work had to be done manually.

Post-Implementation Problems

Not surprisingly, most of the problems Acquisitions staff members dealt with after implementation were related to issues they faced in pre-implementation. The most pressing concern was to create and to close a FY2016 Alma acquisitions system and then roll over the data into a new FY2017 Alma system by the start of FY2017 in July 2016. Fiscal closing and rollover involved three steps. Step one was to close out FY2016 Sierra data in early June. Step two was to manually add FY2016 Sierra acquisitions data into new Alma accounts after Sierra's closing. Step three was to close out the Alma FY2016 account and roll its data into a new Alma FY2017 account following Alma fiscal closing/rollover procedures. After a significant amount of technical work, Acquisitions staff accomplished the rollover and closing process accurately and timely during the first week of FY2017. A second matter was creating load tables and getting them to work properly so that order records could migrate over correctly and new records could be created efficiently. A third issue was correcting coding problems in records that appeared after migration. A fourth problem was manually adding allocations to all serial records because Alma required allocations for serial records as opposed to Sierra order records that did not. Lastly, staff had to figure out how to correctly run Acquisitions reports that Library Administration needed in the format and style administrators and managers were used to receiving in Sierra.

There were a variety of other tasks and challenges post implementation. One was assigning appropriate staff roles and creating accurate profiles in Alma. Roles to consider were Acquisitions Administrator, Fund Manager, Invoice Manager, Receiving Operator, Purchasing Manager, and Vendor Manager. With a relatively small Acquisitions staff, many workers, especially the Acquisitions Coordinator, had to take on several roles. Another was Acquisitions expeditiously developing internal procedures in such a way so staff members

could understand basic Acquisitions tasks soon after migration rather than rely on Alma documentation that was often difficult to understand for new migrators. For example, staff developed a checklist for processing electronic invoices in Alma and wrote detailed procedures for receiving physical items when paying in Alma. Acquisitions also had to educate other staff on how to read acquisitions records such as transactions on fund codes and notes on order records.

During all phases of implementation, an ongoing concern was staff training. Representatives from **ExLibris** conducted on-campus training for two days several months before implementation. For the most part, staff members were unfamiliar with Alma at the time and found training to be difficult to follow and not particularly helpful. After the **ExLibris** training, Acquisitions unit members self-trained in the Alma sandbox and watched several training modules in Alma Essentials, the central training site of Alma, while trying to keep up with their regular assignments. They also networked with other Alma libraries in the Commonwealth of Virginia who were either already using Alma or in the process of migrating.

Solutions or Lessons Learned

One difference between Sierra order records and those in Alma is that Alma order records have a lot more tabs. After much slow-going, staff members are now accustomed to those extra tabs and are completing the order creation process much more quickly. Moreover, order records with coding errors are being suppressed and corrected as they are found. Furthermore, staff members are now aware that eBooks and print books with the same titles cannot be combined on one record and are downloading separate records as needed.

Creating load tables is working well. Our primary book vendor is **YBP**. It took months for **YBP** to set up parameters that met our load table needs — but record importing is now seamless. For the most part, profiles are set up correctly except for firm order eBooks. We are still working on a resolution.

Getting staff adequate training remains a challenge. To this point, members of the Alma Implementation Team have conducted formal training twice since implementation and will be scheduling more training in the months ahead. Most training is informal among staff members as they attempt to develop work-arounds and new workflows. Staff continues to view Alma webinars via Alma Essentials. They also access **ExLibris'** Idea Exchange to learn what other Alma users are doing. The Associate University Librarian of Resources has conducted group and individual training

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on Analytics. In addition, several members of the Acquisitions unit have joined the Alma listserv.

Analytics is running smoothly as the person responsible for creating financial reports has developed a workable template and easily downloads data into Excel to satisfy the demands of supervisors and administrators.

Results

Changing integrated library systems is never easy. Despite a few lingering issues that are being addressed, ODU's Alma migration for Acquisitions has worked primarily because of the dedication, determination, and diligence of a very talented staff. In comparison to using Sierra, Acquisitions staff members now take a little longer to complete some acquisitions tasks in Alma such as paying invoices. But staff members are talking Alma, processing invoices promptly, running extensive financial reports, and coding order records correctly. They not only interact among themselves to troubleshoot things but also regularly read Alma documentation, consult with Alma colleagues at other libraries, monitor discussion on the Alma listserv, participate in Alma webinars, and view training webinars in Alma essentials. All in all, ODU's Alma Acquisitions migration has been a positive experience. 🍷

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Pelikan's Antidisambiguation — Digital Verisimilitude

Column Editor: **Michael P. Pelikan** (Penn State) <mpp10@psu.edu>

I had to change systems recently — my primary work system, that is. It meant moving from a Dell laptop to a Surface Pro 4. How strange it would have seemed, just a few years ago, when our work system lived under the desk at work, weighing in at a decent twenty or thirty pounds, to have a “main system” be the size of a slender portfolio weighing a couple of pounds.

Fortunately, all this has advanced at about the same rate as my back troubles. Remember the early Compaq Computer ads? I remember one showing a businessman, looking really smooth, sauntering onto an airliner with his Compaq Personal Computer, no larger than a good-sized sewing machine! If you google “Compaq computer magazine ad airliner” you’ll find the picture I’m referring to. It’ll be right near the ad for the 10MB hard disk drive for only \$3398.

This was a wonderful time. 1983! Just a year to go until the Orwellian benchmark. **Reagan** was president, *Billie Jean* by **Michael Jackson** was the Number One song (edging out *Hungry like the Wolf* by **Duran Duran** at Number Three...), *Michener's Space* was near the top of the Bestseller's list, just above *The Little Drummer Girl* by **John le Carre** and *Star Wars: Return of the Jedi – The Storybook Based on the Movie*, by **Joan D. Virge**, which just edged out *The Name of the Rose* by **Umberto Eco**.

In music, the Oberheim DMX was a leading digital drum machine. Introduced in 1981 for \$2895, it was the second digital drum machine to be sold as a commercial product, following the Linn LM-1 Drum Machine of 1980. The DMX featured 24 individual drum sounds derived from 11 original samples. Those distinctive sounds were soon cropping up in hits from **The Police**, **Kim Carnes**, and the **Thompson Twins**.

Let's settle for just a moment on those drum sounds. Hear in your mind, if you will, the accent drum sound featured prominently in *Bette Davis Eyes*. It was clearly a drum-type of sound, but it was so distinctively different as to become, literally, a defining accent in that particular hit — much the same as the accent drum beats in *Center Field* by **John Fogarty**. These were drum sounds, probably even based on real drum sounds, yet digitally sampled and processed to the point that they became a percussion instrument not heard before — drums but not drums. These were recognizably drums but different enough to build an entire rhythm motif around, practically defining a snapshot in popular music.

It was those qualities of simultaneously “recognizably being drums” and “not being like any drums we'd heard before” that gave those little sounds the power to be much more than accents in a rhythmic scheme, essentially defining not just the rhythm but the song.

That's digital verisimilitude.

These sounds, and the machines that artists used to make them, contributed to a growing public sentiment around the meaning and use of the word “digital.” This showed up in the same temporal neighborhood, right around the corner, in fact, from the introduction in 1982 of the Phillips/Sony Compact Disc data storage format. This was an outgrowth of the technological cultural impact of **NASA**, the iconic sounds of voices sent to the surface of the Moon from Earth, the intertwining of synthesizer sounds with the science fiction of the time. It got to the point at which you could cue an association of any aspect of the whole space/synth/futuristic thing just by triggering any individual aspect of it.

And yet remember, not to be too pedantically pointy-headed about it (well, ok, maybe to be a least a *little* too pedantically pointy-headed about it), those culturally iconic sounds born out of the Sixties and Seventies (“One small step for Mankind”), **Robert Moog's Switched On Bach**, **Jimi Hendrix's Star Spangled Banner**: these were the product of analog instruments, all the sound augmentation and synthesis, the recording technology, these were entirely analog in nature.

The Nyquist Theorem was already around, waiting to change everything. It just hadn't met

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