Road Trip to Alma and Primo -
We're on the Way!
Road Trips - the good

• The Great American Road Trip is a national rite of passage
• Attractions
• There are gas stations and cafes along the way
• Pass through wine country
• Offering the chance for more exploration
• Discover extraordinary places
Road trips – the bad

• Anyone with a car can go anywhere
• The road offers plenty of distractions
• Winding roads
• Passes through largely barren uninhabited regions
Road trips – the ugly

• Detours; get lost
• Roadblocks
• There are old roads that don't really go anywhere but get you deep in the woods
• Involve hardship, slogging through a forest, testing your adaptability, hoping for some sort of revelation
The Trip Starting Point

- Aleph
- MnPALS Plus for discovery
- Various web-scale discovery tools
- Various link resolvers (some libraries had none)
- Various ERM solutions (some libraries had none)
Why are we taking this trip?

• Similar functionality available to all members:
  – Discovery tool
  – Electronic resource management
  – Link resolver

• Rite of passage
• Attractions
• Others have taken this trip; some of whom we know; they survived (and they said it was worth it)
Who Is Going?

- The Consortium of MnPALS Libraries: Diverse in size and type
  - Minnesota State (37)
  - Private colleges (6)
  - State government libraries (6)
  - Special libraries (3)
- PALS staff: tour guide
Getting Ready

• Began discussions: November, 2011
• RFP Process (April – December, 2015)
• Selected destination in May, 2015: Alma/Primo
• Contract with Ex Libris (travel agent) – signed March, 2017
Why Destination: Alma?

Ex Libris Alma facilitates unified management of all resource types, drives collaboration across institutions and accelerates the delivery of new value-added services

From Ex Libris
Implementation Timeline

- September - December, 2017: Tested with 4 vanguard libraries
- January, 2018: Kickoff for full consortium
- March/April: First test load of migrated data
- April: Configuration of Alma and Resource Sharing; Primo populated
- December/January: Final data load
- January, 2019: Go live
Short Road Trip first

- Vanguard Phase
- September – December, 2017
- Try out the trip on a small scale
- 4 months, 4 libraries
- i.e. 4 days, 4 people
- Travel agency
- Tour guide (SURPRISE: we are leaving tomorrow!)
- Big bus none of us has driven before
Vanguard Phase

- Anyone with a car can go anywhere
- There are gas stations and cafes along the way

- Learning
- Planning
- Data review
- Some functionality testing
- Valuable – we learned how our data would migrate; second data load increased confidence; learned the migration process
The Road Trip

- Full Consortium (52 libraries)
- January, 2018 – January, 2019
- 13 months, 52 libraries
- i.e. 13 days, 52 people
- Travel agency
- Tour guide

We’re all in this together!
The Road Trip

• Learning
• Planning
• Data review
• Testing functionality
• Breaking up the trip into parts
The Road Trip

• Winding roads
• Involves
  – Hardship
  – Slogging through a forest
  – Testing your adaptability
  – Hoping for some sort of revelation
• There are gas stations and cafes along the way
• Pass through wine country
Road Trip Help: Functional Work Groups

- Developing go-live readiness checklists
- Developing policies
- Making recommendations

- Resource Management
- Acquisitions/Serials
- Fulfillment
- Discovery
- Resource Sharing
- Electronic Resource Management
Added Side Trip: Primo VE

- Offering the chance for more exploration
- Passing through a largely barren uninhabited region
Primo VE – the invitation

“In the long term (2019 or later), Ex Libris plans to switch all Primo-Alma customers from the Primo Back Office model to Primo VE. By participating in this development partnership, you have the opportunity to engage our R&D team directly, supply your input on features and fixes which most impact MnPALS, and save yourselves the additional work of later transitioning from Primo Classic to Primo VE.”
Primo VE – advantages and disadvantages

Advantages:
• Change to publishing model – all in real time
• All configuration features are in the Alma Discovery configuration menus; eliminates Primo back office

Disadvantages:
• Normalization rule options less flexible, but more included out of the box
• Development still in progress
Bus Stops/Accomplishments

- Completed vanguard phase
- Second vanguard data load
- Full consortium kickoff
- Forms completed
- Full Test Data Load
In Process: Now to December

• Video training and webinars
• Weekly meetings
• Data review
• Policy development
• Functional checklists
• Functional testing
• Practice
• Alma configuration
Arriving Home

- December, 2018 - January, 2019: Final data load
- January, 2019: Go live!
Special Attraction: Resource Sharing

• Alma Resource Sharing Peer to Peer
• MnPALS Resource Sharing Workgroup members
  – Barb Bergman, Minnesota State University, Mankato
  – Wendy Gibson, Minnesota State University, Moorhead
  – Jennifer Lund, The College of St Scholastica
  – Katriel McLarn, St Mary's University, Twin Cities
  – Agnes Lee, Minitex
  – Sonja Eilertson, PALS
Vanguard phase and peer to peer resource sharing

- First part of trip
  - Data migration
    - bibliographic records
    - patron records
    - loans
    - vendor records
Data migration and Aleph ILL

- No Aleph ILL partner records will migrate
- No Aleph ILL requests will migrate
- Loan of an Aleph ILL request will migrate
Vanguard phase and peer to peer resource sharing

• Setup resource sharing units for vanguard libraries
  – Minneapolis Community and Technical College
  – Minnesota Historical Society
  – Minnesota State University, Mankato
  – The College of St Scholastica
Vanguard phase

- Some familiarity with Alma peer to peer resource sharing
  - Able to locate and ship returnable requests
  - Complete a returnable request cycle
  - Messages
Resource Sharing Workgroup

• Workgroup members shared current workflows
  • Basic workflow and needs (mediated or unmediated)
  • Electronic delivery/digitization
  • Distance/online students or document delivery
• Suggest everyone migrating to Alma think about their workflows
Resource Sharing Workgroup

• Call with University of Wisconsin Colleges
• Use Alma peer to peer for Returnables
  • One rota
  • Standardization of loan policies
  • Shared workflow and their delivery slip
  • Starting project on personal delivery
Summer work plan

- Add resource sharing units for workgroup members
  - Learn the software
  - Work on our priority list
  - Create functionality testing list
  - Test the software
  - Suggestions for workflow and policy
Speed bumps

- External request identifier
- Lending/delivery slip and the delivery code
- Electronic resources/databases
- Article requests
- Primo VE- patron created requests
- Rotas
Lending request

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**Borrowing request number**

- **External identifier:** 1/01MNPALSMGCT0000002
- **Request Status:** Being Processed
- **Resource Locate Status:** Resource Located
- **Requested Media:** Any
- **Request Printed:** No
- **Request Reported:** Yes
- **Requested Format:** Physical
- **Creation Date:** 01/23/2018
- **Update Date:** 01/23/2018

Minneapolis Community and Technical College
Minitex to Alma

• Minitex for Aleph software
  – Been on MnPALS Aleph server
  – Move back to the U of MN Alma instance
• Minitex and University of Minnesota Twin Cities
  – Agnes Lee, Minitex
  – Chris Rose, University of Minnesota Twin Cities
Minitex to Alma

- Work on functionality Minitex needs to supply items
  - University of Minnesota Twin Cities locate for returnables
  - University of Minnesota Twin Cities locate for e-resources
- Work on testing functionality Minitex needs
  - As referral center
More work ahead

• Interoperability with
  – ODIN libraries that use
    • Aleph
    • Alma
  – VDX libraries

• Patron requests from other discovery options
  – MNLINK Discovery
  – EDS
Goal- smooth connections for all!
Questions?