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From MIllennium to Alma/Primo: Pre-Migration Preparation,Testing and Cutover

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From Millennium to Alma/Primo: Pre-migration Preparation, Testing and Cutover

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Agenda

- Overview
- Pre-migration Preparation
- Testing
- Cutover
- Project Management
- Experiences and Lessons
- Questions and Comments

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Audience

- New Alma users

- Plan to migrate from Millennium to Alma

- People who are interested in the topic

Overview

- Orbis Cascade Alliance
- 4th Migration Cohort
- Alliance Working Groups
- CWU Implementation Team
- Communication
- Documentation Center

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Create a Migration/Implementation Team

- Charges
- Members
- Duties
- Task Forces
- Documents/Wiki/Shared Drives
- Bi-weekly meetings
- Communication

Ex Libris Implementation Team

Charges

The Ex Libris Implementation Committee shall coordinate with the Orbis Cascade Alliance's Shared ILS Implementation Team to implement a new library management service at CWU – Ex Libris' Alma and Primo. The team is expected to focus on preparation, migration, configuration, project management, and training.

Members

Andy Jackson, Beata Miller, Dale Brubaker, Gavin Spomer, Erin Bledsoe, Jennifer Ryder, Karen Stephens,Ginny Blackson, Kathleen Nelms, Kerry Slaughter, Mary Wise, Michele Reilly (Co-Chair), Patricia Cutright (ex officio), Ping Fu (Co-Chair), Greg Harvill (IS Representative)

Duties

A. Coordinate the overall migration and operation of the Shared ILS at CWU;

B. Coordinate with the Alliance's Shared ILS Team and the migration cohort we will be in to ensure all concerns regarding policies, procedures, and system-wide standards for use of the system as are required are addressed and resolved prior to migration;

C. Identify and promulgate best practices at CWU;

D. Consult and communicate with the Alliance, Ex Libris and other Alliance members within the Cohort regarding the migration and operation of the system;

E. Serve as an expert resource for the ILS and its migration and operation at CWU;

F. Define and verify mapping definitions required for data migration: ILS bibliographic, items and fulfillment data;

G. Responsible for data extraction from Millennium, providing input on migration mapping and providing post-migration feedback;

H. Gather configuration input from library staff and provide post configuration feedback based on end-to-end review of Alma configuration, functionality and data migration;

I. Coordinate with the Alliance to perform CWU project management and training, coordinating with the Alliance and Ex Libris for scheduled data migration and configuration activities.

The Committee shall meet monthly during the preparation period (July, 2013 – June, 2014) and weekly during the implementation period (July, 2014 – Jan, 2015).

Task Forces

Cataloging Migration Task Force: Mary Wise, Karen Stephens, Jennifer Ryder

Checklist https://docs.orbiscascade.org/silsdocs/functional%20areas/cataloging/

Resource Management Guide http://www.lib.cwu.edu/wiki/images/b/b1/Alma_Resource_Management_Guide.pdf

Government Documentation Migration Task Force: Kathleen Nelms

Checklist https://docs.orbiscascade.org/silsdocs/functional%20areas/cataloging/

Acquisition Migration Task Force: Ginny Blackson, Beata Miller

Checklist https://docs.orbiscascade.org/silsdocs/functional%20areas/acquisitions/

Pre-migration Preparations

- Data Cleanup Tasks
- Resources/Site Visiting
- Customer Information Form
- Integrations with External Systems
- Migration Forms
- Configuration Form
- Url Link Resolver Form

Pre-Migration Cleanup Tasks

- Deduping Record Numbers in 001 Fields Part 1 - Finding and fixing two common problems in Millennium 001 fields. *(Added 3/1/2013)*

- Deduping Record Numbers in 001 Fields Part 2 - Finding and fixing cases where you have multiple bib records with the same record number in the 001 field. Essential cleanup task for preparing for re-linking your records to the Alma Network Zone records. *(Added 3/1/2013)*

- Same Title Items in Same Location with Different Call Numbers - Find and fix cases where multiple item records, attached to the same bibliographic record, have the same location codes but different call numbers. If not fixed, only the call number in the first such item Alma encounters will be kept -- and the remaining call numbers will be lost. SEE NEXT ITEM FOR UPDATE*(Added 3/12/2013; Updated 9/3/2013)*

- Same Title Items in Same Location with Different Call Numbers 2 - An update on how cohort 2-4 libraries can complete their Migration Form to allow multiple items attached to the same bib record and in the same location to have different call numbers.*(Added 10/8/2013)*

- Creating a List of Bound-With Titles in Millennium - One method of creating a Review File of bound-with titles so that you can verify and/or correct proglems before and after data is migrated to Alma. *(Added 3/12/2013)*

- Identify and fixing 007 fields containing Connexion-style subfield delimiters - 007 is not a variable field. Programs reading MARC records expect it to have a certain number of characters. If the 007 field has too many characters, it is structurally invalid and may fail to import into Alma, or assigned incorrect material types in Primo. In this cleanup task, incorrectly-constructed 007 fields that contain Connexion-style subfield delimiters are deleted. *(Added 3/12/2013)*

- Identify serials (that are not for online electronic resources) that don't have holding (checkin) records attached in Millennium - Alma needs to have a summary holdings statement to create holdings records for serials (that are not for online electronic resources). This document shows how to identify print serials that don't have holding (checkin) records attached in Millennium. *(Added 3/12/2013; Updated 3/22/2013)*

- Splitting Holdings Records - For libraries that use a single check-in record for a journal, but have shelved issues in two areas, e.g., unbound issues in a current reading area and bound volumes in journal stacks. Alma may create only a single holding record and show all issues as being in a single location. *(Added 3/12/2013)*

- Cleaning Up 003 Fields - Record matching in Alma during loading and re-linking uses values in 035 fields as a match points. When migrating bibliographic records to Alma, the value in the 001 field is moved to an 035 field and a qualifier (e.g., "(OCoLC)") added based on value in the 003 field of the record. Records that contain an OCLC number in the 001 field, but do not contain (OCoLC) in the 003, or do not have an 003 field, will not have the correct qualifier in the 035 and matching and re-linking will often fail.*(Added 4/26/2013)*

- Alma Local Bibliographic Record Extensions - Ex Libris has developed a new Alma functionality, bibliographic record extensions, that allows a library to protect fields that contain local information. However, in order for fields in Millennium bibs to be migrated to Alma bib

Acquisitions record clean-up projects, pre and post migration.
Suggestions from Alliance Cohort 1 libraries and from the ELUNA list. May 9,2013

Complete as many POs as you can, particularly continuations for which you have cancelled the subscription. Look for old open monographic orders (gifts at BC).
Princeton, Boston College and Getty Research Institute

Print and electronic orders on the same PO line. Alma treats physical and electronic items differently and they need to be separated to be handled properly.
Princeton, Getty Research Institute

Make sure all prior fiscal year funds are inactive. Identify current fund codes in use. Boston College, Getty Research Institute.
University of Salford

Clean-up order types (monographic, subscription, standing order) since they can't be changed in Alma.
Boston College

Close vendors that are no longer used.
University of Salford

Standardize use of acquisitions data as data is designed to be shared in Alma.
Cohort 1 Libraries

Archived a large number of older order records so we would have less order records to migrate. We also cleaned up some coding identified during the archiving process. We deleted old, unused vendor records and created new vendor records for as many orders that we could that formerly had vendor = "none."
Patty Carey, University of Washington

Archive older, closed order records migrating only open and more current closed records
Megan Banasek, Pacific University

Reformat non-MARC bibliographic records into MARC format using MARCEdit. Alma requires that records be in MARC format to migrate into the system.
Kathleen Spring, Linfield College

Cleanup of the Millennium Order record Form field, Format field (11) in MRY's database, may be required as this data maps to the Alma PO Line Reporting Code field. This Alma field can be used in Analytics reporting as defined by your institution. MRY is using it for annual statistical gathering for surveys such as ACRL, NCES and the like. We have added material formats that more closely match the statistical needs of these surveys in our Alma Configuration form. The cleanup work involves updating all Millennium order records you plan to migrate for accurate mapping to the Alma Reporting codes defined in your Alma Migration and Configuration forms.
Judy Voges, Marylhurst University

Ticklers are stored a POL notes fields within Alma. Export files of ticklers from acquisitions and check-in records prior to migration to have easy access to the information for clean-up and follow-up post migration.
SILS ACQ WG

Post migration plans:

Referencing the Alma Migration form, PO Entry Point tab, the current values for Millennium Order Status codes are placed in a note field in the Alma PO Line upon migration. See the Millennium (III) to Alma Migration Guide (April 2013 releases) p. 30 under PO Entry Point. Before final cutover export a file that contains at least the order status and .o record number for order records you are migrating. The Millennium order record number will become the PO Line number in Alma and is searchable. After cutover you will be able to confirm accuracy of data between the two systems. It may also be helpful as you begin your work in Alma to identify orders with a specific order status at the time of data extraction.
Judy Voges, Marylhurst University

Regarding vendors, we deleted unused vendor records. Unfortunately, I didn't have much time to do cleanup on these files so we'll be working on this after cutover. I read, heard or dreamed somewhere along this adventure that our vendor records will be shared at either the network or community zone level. If this is true I'm a bit concerned about a few of our vendor records which contain login type data. I'm hoping this data will not automatically upload to a network or community zone view. We'll be checking this in our production environment as well as the Alma network zone when available.
Judy Voges, Marylhurst University

Pre-Migration Tasks

- Clean Up/Simplify Loan Rules - Although not mandatory, a number of libraries have found that by reducing the number of loan rules they had it made filling out the ExLibris Configuration forms easier.
- Bills and Fines - Here are instructions on how to compile bills and fines notices as a batch while you still keep sending them to patrons. This gives you a record for what will just be sent as one total charge when the patrons are migrated to ExLibris. - (03/20/13)
- When looking at your Library Use Only Items you may want to see these notes as you you fill out your migration forms. (05/03/13)
- Our group has developed a number of Millennium Cutover Tasks that migration libraries might want to take a look at. (05/28/13)
- Coordinate staff to test Alma. Lewis and Clark has developed list of functions to test.

Post-Migration Tasks

- Create lists of fields from patron and item records that were exported, verify that all fields have been succesfully imported into Alma.
- Make sure all of your loan periods and items checkout for the appropriate time for the appropriate users.
- The University of Washington analyzed how it would translate its ILL tasks from Innovative to ALMA. (09/10/13)
- Laura Wiley at the University of Oregon has developed these "Functionality or Readiness tests". (09/10/13)

Table of Contents

Integrations with External Systems

http://www.lib.cwu.edu/wiki/images/6/6c/Shared_ILS_User_Authentication_and_Integrations_with_External_Systems.pdf 📄

Systems Checklist

Checklist https://docs.orbiscascade.org/silsdocs/functional%20areas/systems/ 🔒

Alma Admim Guide - Loading External Users from the Student Information System into Alma: Page 14-21

http://www.lib.cwu.edu/wiki/images/9/98/Alma_Administration_Guide.pdf 📄

Alma Integrations with External Systems Guide

http://www.lib.cwu.edu/wiki/images/7/7c/Alma_Integrations_with_External_Systems_Guide.pdf 📄

Patron Load into Millennium from PeopleSoft

http://www.lib.cwu.edu/wiki/images/1/1a/Patron_load.pdf 📄

Sending daily Bursar report out from Millennium

http://www.lib.cwu.edu/wiki/images/7/77/Bursar_feed.pdf 📄

Load Marcive records into Millennium

http://www.lib.cwu.edu/wiki/images/2/2e/Installing_Marcive_records_Jan_2014.pdf 📄

Millennium Acquisitions Ordering, Receiving, Invoicing and Posting Procedures

http://www.lib.cwu.edu/wiki/images/2/2a/Ordering_and_invoicing.pdf 📄

Testing

- Data Extraction/FTP

- Test Database

- Testing Guides

- Additional Testing Checklists

- Training

- Project Control

Cutover

- Cutover Plan/Checklists

- Final Data Extraction

- Live Testing

- SF Cases

- Fixes

- Go-Live

- Post Migration Cleanups/Fixes

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Project Management

- Gantt chart
- Bi-weekly Team leads meetings
- Informal talks and meetings
- Dean's step-in
- Alliance Alma/Primo implementation weekly call
- Alliance Shared ILS implementation Team meetings

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Experience & Lessons Learned

- Stress/Concerns

- Resources/Site Visiting

- Training

- Communication

- Team Work

- Timeline

- Project Management

- Learning Curve

Questions? Comments?

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