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Systems Manager's Roles in the Migration to Alma/Primo: Experiences and Lessons Learned at CWU

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**Systems Manager's Role in the Migration to
Alma/Primo: Experiences and Lessons Learned at
CWU**



Central Washington University

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Agenda

- **Background Information**
- **Three-phase Migration Model**
- **Systems Manager's Roles**
- **Experience and Lessons Learned at CWU**
- **Q/A**

Background Information

- **Orbis Cascade Alliance**
- **Shared ILS Project**
- **Profile of CWU Libraries**
- **Timeline**

More info <https://www.orbiscascade.org/shared-ils/>

Data

At the beginning of the migration, the Millennium ILS contained:

- **893,354 bibliographic records**
- **946,818 items records**
- **254,033 authority records**
- **1,094 check in records**
- **20,247 patron records**
- **709 vendors records**
- **6,608 invoices records**
- **8,887 order records**
- **107 course records**
- **86 license records**
- **28 contact records**

The electronic resources were managed by ProQuest 's Serials Solutions 360. There were about 130 databases and 30,000 e-journal titles.

Before Migration: Departments and Staffing

- **Dean's Office - 1 Dean, 2 administrative assistants**
 - **Cataloging - 2 Librarians (one general, one music) , 3 paraprofessionals**
 - **Collection Development - 1 Librarian, 1 paraprofessional**
 - **Serials/e-Resources - 1 Librarian, 3 paraprofessionals**
 - **Circulation - 5 Paraprofessionals +1 Music library paraprofessional**
 - **Systems - 1 Librarian, 3 IT specialists**
 - **Center Libraries - 2 paraprofessionals**
 - **Reference - 5 librarians, 1 paraprofessionals**
 - **Government Documentation – 1 librarian (as Association Dean), 3 paraprofessionals**
 - **Archives & Special collections – 1 Archivist, 1 librarian, 1 paraprofessional**
- A total of 38 employees: 12 librarians, 1 archivist, 20 paraprofessionals, 3 IT specialists, 2 administrative assistants.**

Three-phase Migration Model

- Phase One, defined as the pre-migration cleanup and preparation phase, started on July 1, 2013 and ended on June 30, 2014.
- Phase Two, defined as the migration, testing, and training phase, started on July 1, 2014 and ended on November 18, 2014.
- Phase Three, defined as the cutover, post-migration cleanup, and reporting and fixing outstanding issues phase, started on Dec 19, 2014 and ended on May 30, 2015.

Systems Manager's Role at Phase I

- **Implementation Team**
- **Task forces**
- **Pre-migration cleanup**
- **Information Resources**
- **Training**
- **Onsite visit**
- **Migration forms**
- **Project management**

Systems Manager's Role at Phase II

- **Kick off meeting**
- **Forms review**
- **Sample data and full data extraction**
- **Alma certificate/functional training**
- **Primo certificate/functional training**
- **Primo configuration**
- **Primo/Alma authentication**
- **SFTP/Patron load/Bursar transfer/Invoice payment/EDI**
- **Ezproxy**
- **OCLC Connexion and other integration profiles**
- **Cutover plan/go-live checklist**

Systems Manager's Role at Phase III

- **Sample data/full data extraction**
- **Testing**
- **Go-live**
- **Post-migration testing troubleshooting**
- **Coordinate with Alliance working groups and vendors**

Sales Force Cases

Role	No. of SF cases	Issues	percentage
Systems Manager	87	General and specific issues	47.00%
Electronic resource Librarian	27	Electronic Resources	14.60%
Cataloging	23	cataloging	12.45%
Circulation	23	Circulation and resource sharing	12.45%
Acquisition	21	Acquisition	11.35%
Others	4	Systems/serials	2.15%
Total	185		100%

Conclusion

- **Manage much less in terms of tasks directly related to information technology**
- **Increase their responsibilities and roles greatly in more human/organization related tasks**
- **Communication**
- **Strong familiarity with workflows and functionality**
- **Staff training**
- **Discovery interface configuration and customization**
- **Strong leadership and excellent management**

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Q/A

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