

NOTES FROM SCCC MEETING ON ALMA IMPLEMENTATION

Kapi'olani Community College Library

February 1, 2019

Attendees: Paul Beck (UH Hamilton CatSS), Erica Chang (UH Hamilton Cataloging), Alphonse Garcia (UH West O'ahu), Diane Johnson (Kauai CC), Carol Kellett (UH Library Systems Office), Luree Ohigashi Oasay (UH Medical School), Keiko Okuhara (UH Law School), Allyson Ota (Honolulu CC), Kathleen Stacey (UH Hilo), Nancy Sack (UH Hamilton Cataloging), Michelle Sturges (Kapi'olani CC), Jue Wang (Leeward CC), Eileen Yara (UH Hamilton Acquisitions)

Guests: Sheila Yeh (UH Mānoa AUL for Library IT), Nackil Sung (UH Hamilton Acquisitions)

MEETING WITH SHEILA YEH AND NACKIL SUNG

CHANGE IN ALMA IMPLEMENTATION PROJECT MANAGER

Sheila announced that she will be leaving her position at UH Mānoa. Nackil will be taking over her role as Project Manager for the Alma implementation.

ALMA CONFIGURATION

- When we are in Alma, system configuration will have to be done in the Network Zone *and* in each Institution Zone. Nackil Sung, Fred Allen, and Arthur Shum will all be certified to do system configuration as part of the migration project. After the migration, additional people can be certified to do system configuration if they so wish.
- Systems will handle Alma and Primo VE configuration during the implementation. After the migration, sites can decide how much configuration work they want to do for themselves, (which will require at least one staff member to be certified for system configuration), and how much they wish to rely on the System Office for configuration.

MAIN CONCERNS FOR CATALOGING

DATA CLEANUP

- The UH Library System will move from the Onboarding phase to the Implementation phase this month (February). By March 1, the Ex Libris Migration Team will come on board. A month or so after the Implementation phase starts, when the Ex Libris Migration Team has the setup information it needs, the test load of our Voyager data will be performed to create our Alma test database. We will have around 6 months to use the test load to make configuration and workflow decisions and identify cleanup needs not addressed before the test load. Around October/November the cutover to live starts and there will be a cataloging freeze of several weeks. Plans are to go live around December.

- The UH Implementation Project Managers are relying on the cataloging group for data cleanup. Catalogers are being asked to identify cleanup work and determine how to divide up the tasks so the work gets done.
- Systems personnel are available to run reports and Global Data Change jobs if needed. Requests should be submitted via the assist@hawaii.edu Systems account.

TRAINING

- All functional committees are being asked to identify what training is needed and direct staff to appropriate materials. In many cases, committee members will have to decide workflows in order to decide how to train staff. Decisions include which staff need to be trained and (based on their roles) to what degree? Also, what training is needed at what stage of implementation?
- Committees are being asked to develop training manuals for staff working in the Alma environment. For cataloging libraries might need to be 2 training manuals, one for working in a library's Institution Zone, and another for working in the shared Network Zone.

MEETINGS AND COMMUNICATION

- The UH Implementation Project Managers are asking all functional committees to meet as regularly and frequently as possible. Focus should be on data cleanup tasks and establishing a training plan.
- Committees are also being asked to maintain 2 tables:
 - A table of tasks coming due, stating deadlines and identifying responsible parties
 - A table outlining training plans. Who is responsible for what training at what stage? Who is responsible for developing the training manual(s)?

Discussion Following Meeting with Sheila and Nackil.

Proposal to Divide Migration Planning Tasks Among Subcommittees

Michelle explained that during the last system migration to Voyager, the catalogers established small subcommittees that looked at different areas that would need coordination in the shared database such as operator profiles, import profiles, shared templates, training resources, certification for more advanced operations. Michelle asked committee members if they would be interested in using a subcommittee approach to tackle similar decisions relating to the Alma migration. No Decision Made.

PROPOSAL TO CONFIGURE THE NETWORK ZONE FOR AUTO-UPDATING

Nancy reported that in Alma it is possible to configure the Network Zone to be auto-updated when an OCLC record is updated and when an authority record is updated. She said some libraries choose to allow auto-updating and others don't. No Decision Made.

PROPOSAL TO POSTPONE TRAINING DISCUSSION

Committee members agreed to table a formal training discussion until a later meeting. In general, it seems customers migrating to Alma are asked to do as much training as possible with the documents and videos available at Ex Libris Knowledge Base. Then about 2 months into the test database phase there is a brief session of live, face-to-face training in which participants can ask specific questions based on the work they have done in the test database. The cutover period during which cataloging is frozen might be a good time to train.

DATABASE CLEANUP DISCUSSIONS

- Michelle recommended two presentations from recent Eluna conferences that talk about data cleanup in preparation for an Alma migration. Both are available in the Alma Info for SCCC team drive, in the Data Cleanup Documents folder:
 - Data_Cleanup_Before_Alma-What_really_matters_Eluna2018.pdf
 - Preparing_Alma_Implementation_Voyager_Libraries20180427.pdf
- PROBLEM: Bib records with no holdings or items.
Michelle reported there are over 6,000 bibs with no mfhd in the UH shared database. Around 200 of the bibs have purchase order line items attached.
 - DECISION 1: Michelle will send a report of bibs with P.O. line items to the sites associated with the line items so they can investigate and cleanup.
 - DECISION 2: Michelle will send a report of the remaining bib records to the Systems Office for deletion.
- PROBLEM: MFHD Location and Item Permanent Location Are Different
The section called “MFHD Versus Permanent Location” in the Voyager to Alma Migration Guide (https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides/Voyager_to_Alma_Migration_Guide) explains how having mfhd and permanent item locations in Voyager that do not match will lead to items having incorrect locations or to holdings being incorrectly split during migration.
 - DECISION: Michelle will send a report of mfhd/item mismatches to each site.
- How Item Data Migrate
The Voyager to Alma Migration Guide (https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides/Voyager_to_Alma_Migration_Guide) contains sections that explain how item data will be migrated to Alma. See the sections “Item Statuses,” “Item Barcodes,” and the table following the section “Duplicate Locations in Voyager” for more information.

Item records in Alma have a Public Note, a Fulfillment Note, three Internal Notes, and three Statistics Notes.
 - Voyager item caption field data migrate to the Alma Public Note and will be viewable in Primo.

- Voyager Item Notes marked as charge or discharge notes migrate to the Fulfillment Note. Information about number of pieces (when greater than 1) also migrates to the Fulfillment Note.
 - Voyager Item Notes marked as regular migrate to Internal Note 1, (along with some serial and e-item data).
 - Extra Item Barcodes migrate to Internal Note 2 (along with Issue notes).
 - Voyager free text notes, Price, Reserve status, Spine label, historical use data and some item statuses migrate to Internal Note 3.
 - Voyager item statistical categories migrate as follow: 1st migrates to Statistics Note 1, 2nd migrates to Statistics Note 2, 3rd and all others migrate to Statistics Note 3.
- PROBLEM: Multiple barcodes. Voyager allows multiple barcodes, Alma does not. Alma documentation says inactive barcodes get moved to an item note field, but libraries might want to delete their inactive barcodes. Deletion can only be done manually. There is a report available at the site <http://reports.lib.hawaii.edu/migration/> under “#7 Item records with no barcodes or with multiple barcodes.” Note: The report contains info for all sites, so each site will have to sort by location or barcode to find their problem items.
- PROBLEM: MFHDs with identical 852 fields, (same location, same call number, same copy number). Alma does not allow two holdings records to have identical 852 fields. It is not clear what happens to these records during migration, but the recommendation is to clean up the duplication beforehand.
 - DECISION: Catalogers should go to the site <http://reports.lib.hawaii.edu/migration/> under “#10 Multiple holdings records for identical item copies for the same location/ call number” to download the report for their problem records and clean up their mfhd's with identical 852 data.
- PROBLEM: MFHD call numbers with formatting errors that cause them to sort improperly in Alma's shelflist feature, (primarily call numbers without a subfield i).
 - DECISION: Sites agreed to clean up problems distributed to them in reports run by Nancy Sack in 2018.
- PROBLEM: Bib records that share formats, (e.g. print and electronic holdings). Nancy Sack reported that representatives she has spoken with from other libraries involved in Alma migrations say different formats have to go on separate records.
- Other Data Cleanup News
 - Carol Kellett will be helping Maui CC Library with data cleanup as their cataloger position is vacant due to a hiring freeze.
 - Nancy has been given the ability to edit all sites' mfhd's and has cleaned up all instances of 852 indicators coded for LC Classification (0) when they should be coded for Accession numbers (8).

DEMONSTRATION OF UH LIBRARIES' ALMA SANDBOX

- Michelle showed how to access the Sandbox via the UH Alma Wiki being maintained by the Systems Office
 - Go to <http://assist.hawaii.edu/wiki/alma/implementation/start> (login: library, password: readonly)
 - In the Table of Contents box in the upper right part of the screen, click on the Sandbox link.
 - To test cataloging workflows, select either the Mānoa or the Leeward sandbox.
 - Go to the table of sandbox users to select a user account that has the roles you want to work with in your selected sandbox.
 - Use the login and password of your selected user account to log into the sandbox.
 - DO NOT CHANGE ANY USER ACCOUNT PASSWORDS.