With Careful Consideration and Managed Expectations: Migration from Ex Libris' Voyager to Ex Libris' Alma/Primo

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ILS MIGRATION STORIES

PRESENTED BY LLAMA TECHNOLOGY COMMUNITY OF PRACTICE

JUNE 25, 2017
PANELISTS

• Elizabeth Novicki, Director of Libraries, Salem Academy
• Leland Deeds, Head of Systems, University of Miami
• Julene Jones, Head of Database Integrity, University of Kentucky
• John Sterbenz, University of Michigan, Ross School of Business
WITH CAREFUL CONSIDERATION AND MANAGED EXPECTATIONS:

MIGRATION FROM EX LIBRIS’ VOYAGER TO EX LIBRIS’ ALMA/PRIMO

JULENE JONES
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ABOUT UNIVERSITY OF KENTUCKY & ITS LIBRARIES

- 1 main library + 10 branch libraries, including Medical Center, Law, and Special Collections + 2 storage facilities
- Collection of ~ 4 million print volumes, ~ 2 million e-books, ~200,000 circulations per year
- Student population ~ 31,000, faculty and staff ~6,000
- 60 library faculty and 90 library staff
- Regional Federal Depository Library
- Land grant institution, founded 1865
UNIVERSITY OF KENTUCKY MIGRATION

• 2011: OCLC Reclamation
• 2012: Internal WG: “next gen” ILS
• Live on Alma and Primo January 2016
• Migrated in 6 months; down ~ 1 month
• Migration task forces for Alma (me), Primo, Interoperability, migration oversight
• 4 librarians are Alma Certified
Bibliographic, holding, and item
Patron
Acquisitions (3 yrs)
Authorities (local file imported)

System data (calendars, circ. policies)
Circulation history
Reserves
License information

Data UK migrated

Did not migrate / config. required
PRE-MIGRATION: NAKED DATA VOYAGER → ALMA

Focus on data clean-up projects that impact migrated data!

• Item record’s spine label field does not migrate: ~ 1 million item records
• Item location mismatch to holdings location
• Deleted closed out POs (older than 3 years)
• Review of location codes: 575 to 286
• Duplicate patron records
CAREFUL CONSIDERATION & MANAGED EXPECTATIONS

• Decide what is most valuable to your institution: data, staff comfort, other

• Any thing you’re worried about: Test it or Ask about it!

• Change and stress is perpetual → take care of yourself; do not document everything!

• Communicate what you like about new system; celebrate any forward progress

• Go live ≠ 100% comprehension of new system
UNIVERSITY OF KENTUCKY LIBRARIES: TODAY

- Was the migration a success? Yes and No
- In hindsight...
  - Active/inactive barcodes
  - Call number / call number type mis-matches
  - SFX records with attached POs
  - Reduction of location codes: too severe
- Submitted enhancement requests & Idea Exchange suggestions
- Pace of change: culture shift
QUESTIONS