Freie Universität Berlin

From ALEPH to ALMA

Data Migration in a Complex Library System

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How are we working up to now?

- In the University Library and 3 faculty libraries: Work with ALEPH 500 since 1999
- Until 2003 we integrated 3 different faculty library systems and since then served all libraries of the Freie Universität
- Integration of 11 different libraries into the Philologische Bibliothek
- From 2003 to 2016: Catalogue conversion for all libraries
- From 2011 to 2015: integration of 24 libraries to form the Campus Bibliothek
- 2003 ff: MetaLib, Primo, SFX and Verde – focus changing towards electronic resources

What is our task?

Headlines:

- Specification of the given system ALEPH 500
- Adapt the requirements to the ALMA structures
- Integration of 3 different institutions
- Integration of 5 different software systems
- Preparation of the data
- working along a strict timeline agreed upon with ExLIBRIS
- Prepare the rollout
- Training of more than 400 staff members

Preparation of Data, System Configuration

Integration of 3 different institutions :

- Freie Universität Berlin – the Library System has already been presented
- *Charité – Universitätsmedizin Berlin* – the medical libraries at 3 sites serving approx. 10 000 students and clinics staff
- Museum für Naturkunde – a special library serving the academic museum staff

Items, aquisition and loan data of these three groups of libraries were held in separate administrative data pools.
Bibliographic data and user data are shared.

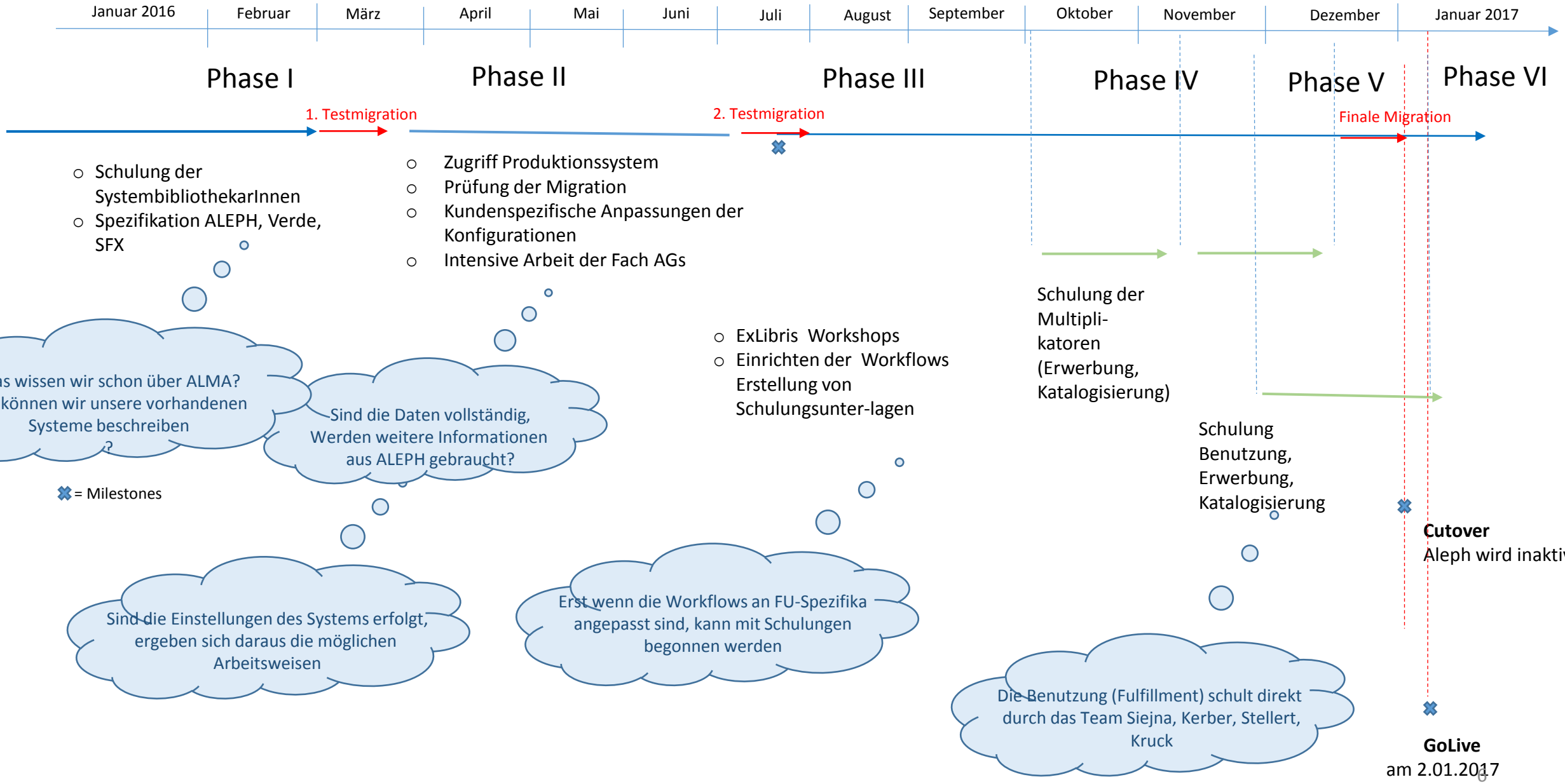
Preparation of Data, System Configuration

Integration of 5 different software systems :

- ALEPH 500 – library housekeeping system – all printed materials are represented – all purchasing and loan operations for printed materials are held here
- SFX – link resolver – all electronic journals and databases are represented
- Verde – ERM system (electronic resource management)
- MetaLib – digital library – federated search in about 700 databases
- Primo – user interface, access to Library System and a vast amount of metadata, articles …

Freie Universität Berlin

Alma Projektplan 02.12.2015 – 02.01.2017



Some New Words to Learn

Community Zone (CZ)	The Alma Community Zone incorporates the knowledge base, a community bibliographic catalog, and global authority files. Can be accessed by any institution that is part of Alma for acquisitions and collection development purposes.
Network Zone (NZ)	Area where shared data (such as catalog, licenses, and e-resources) are managed and are required for certain collaborative network functionalities. Can be accessed by any institution that is part of a cataloguing or acquisitions network. Specific cases include shared catalog and joint acquisitions management.
Fulfillment	Was: circulation. – Processes by which patrons borrow and return physical resources from the institution, or access electronic or digital resources provided by the institution.
Resource Sharing	Was: interlibrary loan.

Phase I, Dec. 2015 – April 2016

Introduction, training, specification, 1st test load

- Start playing in the ALMA sandbox
- Training sessions – basic training
- Functional calls (Aleph team + ALMA AG (working group))
- Specification (implementation form, migration form, configuration form, P2E input file . . .)
- Preparation of data, system configuration
- Security concept (headed by Humboldt University Library)
- Set up staff training scheme
- Establish different project teams

Stand: Jan./2016

Organigramm Projekt Alma

AG-IS
- UB
- Bibliotheksleiter
- Fachbibliotheken
- Charité
- Naturkundemuseum

Direktion

Steuerungsgremium
Kende, Tatai, Müller, Taylor, Surkau (beratend)

Projektleitung
Müller

Projektbüro
Taylor, Surkau, Tatai

AG-Alma
Brocker, Edelmann, Franke-Maier, GPR, Gregor (Charité), Hansmann, Hercher, Hertel, Kende, Kerber, Kowalak, Krauthausen, Krempe, Lapschina, Meye, Müller, Narewski, Rothe, Sabisch, Siejna, Surkau, Tatai, Taylor……

AG-Alma

Fach-AGs		Bereichsbibliotheken
Monografische Medien, Print (Meye)		
Monografische Medien, elektr. (Meye)	⇐	Sonntag, Jugl, Noeske
Zeitschriften, Print (Brocker)		
Zeitschriften, elektr. (Brocker)		
Ausleihe, Fernleihe (Siejna/Kerber)	⇐	Kelm, Konrad, Kirsch/Bansen, Gregor
Katalogisierung, Metadaten (Hansmann)	⇐	Lücking, Paulus, Sperr, Scholtz
Sacherschließung (Franke-Maier / Hertel)		

Primo
Hercher

Stand: 08.2/2015

Organigramm Projekt Alma

Direktion

Steuerungsgremium

Projektleitung

Projektbüro

AG-IS
- UB
- Bibliotheksleiter
- Fachbibliotheken
- Charité
- Naturkundemuseum

AG Erwerbung

AG Benutzung

AG Katalogisierung

Primo-AG

AG Sacherschließung

AG-Alma

Technische Umsetzung	Fach-AGs	Schulungen
Datenmigration, Verwalt.-Daten	Monografische Medien, Print	Admin
Datenmigration, bibliogr. Daten	Monografische Medien, elektr.	Experten
Schnittstellen, Fremdsysteme	Zeitschriften, Print	Ausleihe
Shibboleth, Authentifizierung	Zeitschriften, elektr.	Erwerbung/Katalogisierung
Primo, Implementierung	Ausleihe, Fernleihe	Multiplikatoren
SFX, Linkresolver in Alma	Katalogisierung, Metadaten	Mitarbeiter
Verde	Sacherschließung	
MetaLib		

Tutorial

Phase II, May 2016 – July 2016

Data check, functionality check, preparation of 2nd test load

This is the current phase

- All data can now be checked on the future production system
- Training sessions for the specialists in the project teams
- Functionality checks
- Implementation of so-called work units in ALMA
- Training sessions for the specialists in the administrative team
- Functional calls (Aleph team + ALMA AG)
- Preparation of data, system configuration (Aleph team + ALMA AG)

Phase III, August – Sept. 2016

Interfaces, workflows, analytics

Some parts of this phase are in progress

- Setup of interface to student information system
- Setup of staff users
- Interface to University housekeeping system
- Cataloguing in Union Catalogue – data update tests
- Configuration adjustments
- Workshop with ExLIBRIS, implementation of workflows
- Production of e-learning sessions
- Introductory sessions for entire staff of approx. 400

Phase IV, October – Dec. 2016

Staff training, preparation of the last load (cutover)

- Key-user training for aquisition and metadata management
- Face-to-face training for more than 100 staff members in lending departments throughout the Library System
- Training sessions in the different department libraries held by key users

Alma Training
1 Sept. 2016 – 22 Dec. 2016

1	Training	Definition	Zeitraum
2	Tutorial Produktion	Erstellung von kurzen Videos zur Benutzung von Alma	ab Juli/ August
3	Alma Überblick I	Eröffnung der Schulungsphase mit erstem Überblick über das System - alle MitarbeiterInnen	01.09. 09.00 bis 12.30 Uhr, Hs 1b, Silberlaube
4	Schulung der Multiplikatoren I	Ausgewählte Mitglieder der Fach AGs schulen die Multiplikatoren/ Raum 184	04. bis 11.10. in der UB (6 Tage inkl. MARC21 Grundlagen)
5	Alma Überblick II	s.o.	28.09.; 09:00 - 12:30 Hörsaal C Henry Ford Bau
6	Schulung der Multiplikatoren II	s.o.	14. bis 21.10. in der UB (6Tage inkl. MARC21 Grundlagen)
7	Mitarbeiterschulungen Benutzung	Schulung aller MitarbeiterInnen, die mit Benutzung/ Ausleihmodul arbeiten durch Siejna, Kerber, Kruck und Stellert/ UB	November bis Anfang Dezember
8	Mitarbeiterschulungen Erwerbung / Katalogisierung	MultiplikatorInnen schulen die Mitarbeiter (z.T. während der Cutover-Phase Katalogisierungsstopp)	November bis zum Betriebsurlaub
9	Nachschulungen	Sowohl für Benutzung als auch für Erwerbung / Katalogisierung werden Nachschulungen angeboten	ab Januar

Phase V, 13 Dec. 2016 – 2 Jan. 2017

Cutover

- Closedown of Library System for changes in aquisitions, metadata management and items
- The lending department can still work with ALEPH
- Last changes of ALEPH data to prepare the transfer to ALMA
- See how it goes

Phase VI, 2 January 2017 – 7 February

FUB Go-Live / Post-Go-Live Tasks

- Interfaces are enabled:
  e-mail, printing, self check, user updates, invoices

- Test systems for ALMA and Primo are provided
- Finally we get full administrative access to our systems
- Project completed, switch to Alma support

Phase VII, 7 February 2017 – . . .

Work with ALMA – closedown of existing systems

Projektbüro

+ Add Gadget Edit Layout Tools

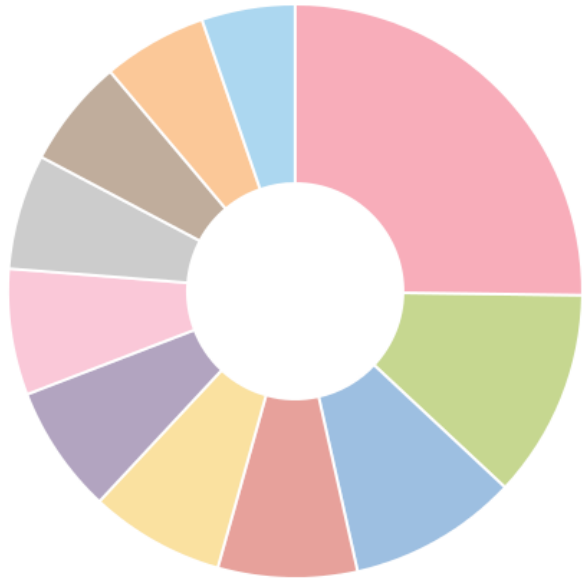
Issue Statistics: offene Issues (Priority)

Priority	Count	Percentage
Blocker	8	3%
Critical	33	11%
Major	68	23%
Minor	10	3%
Trivial	132	45%
Must-Have	32	11%
Nice-To-Have	4	1%
Open	7	2%
Total	**294**	

Issue Statistics: ALMA - Migrationsprojekt (Components)

Components	Count	Percentage
Ausleihe	50	11%
Benutzerdaten	28	6%
Datenbereinigung	64	14%
eBooks	8	2%
Erwerbung	52	12%
Exemplare	36	8%
ExLIBRIS_Aufgabe	25	6%
eZeitschriften	13	3%
Fernleihe	8	2%
Formatkonversion	1	0%

Pie Chart: ALMA - Migrationsprojekt



Components

Total Issues: **523**

Primo	96
Datenbereinigung	78
Ausleihe	64
Konfiguration	62
Erwerbung	59
No component	58
Salesforce	53
Exemplare	50
Katalogisierung	48
Schnittstelle	43
Other...	206

Issues Calendar: ALMA - Migrationsprojekt

ALMA - Migrationsprojekt (Due Date)

June 2016

May | July

Mon	Tue	Wed	Thur	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
Issues: 13 2	Issues: 14 2	15	16	17	18	19
20	21	22	23	Issues: 24 1	25	26
Issues: 27 1	Issues: 28 1	Issues: 29 1	Issues: 30 3	1	2	3

Export in iCal format

Any questions?

Thank you!