Preparing for Your Alma Implementation

Introducing Ex Libris Customer Onboarding

Sonja Vogelsang
Welcome and Introduction

• Sonja Vogelsang
  • Director of Customer Onboarding Services
  • Leading the Customer Onboarding Team
  • With Ex Libris for 16+ years
Agenda

1. What is Customer Onboarding?
2. Planning and Staffing
3. Data Migration Preparation
4. Third Party Integrations
5. Next Steps and Support Resources
What is Customer Onboarding?
Alma & Discovery Implementation

PROJECT ONBOARDING PHASE (Contract to Kick-off)
Average 3-4 months

PROJECT IMPLEMENTATION PHASE (Kick-off to STS)
Average 5-6 months
Alma & Discovery Implementation

Handoffs
Sales – Onboarding
Team – Project Team

Dedicated Project Team
(Avg. 4-6 months Implementation)

Customer
Support team

On Boarding
Welcome / Initial Contact
Getting Ready guides
Customer Orientation
meeting
Access to Sandbox
GTKA Training
Project Analysis
Data Migration Preparation
3rd party Readiness
Milestone Planning

Define
Project Plan
Kickoff Meeting
Project Status Calls
Alma Essentials Training cont.
Alma Fundamentals Training
Config & Migration Inputs
Test Migration / Configuration load

Build
Access to Alma Production
Functional Calls
Functional & Data Review
Access to Primo-Alma Environment
Alma Workshop (on Site)
Go-Live Readiness Checklist
Certification Training
Customer Staff Training
Cutover (Freeze and Load)

Deploy
Go-Live
Functional and Project Status Calls
Post Go-Live Consultancy
Alma Health Check
Initial Status Assessment (STS)
Switch to Support

Life in Production
Support Helpdesk & eServices
Best Practices Sharing
Value of Investment (VOI) Analysis
New Releases & Roadmap

Project Implementation

Customer Management

Customer Education

Project Implementation

Define
Build
Deploy
Life in Production

Customer Support team

Project Analysis

Customer Education

Milestone Planning

3rd party Readiness

Data Migration Preparation

GTKA Training
Project Analysis

Access to Sandbox

Welcome / Initial Contact
Getting Ready guides
Customer Orientation
meeting
Customer Onboarding Objectives

• Understand key implementation activities and timeline
• Prepare your Alma-Primo stakeholders
• Develop familiarity with implementation tools, systems and processes
• Raise and address questions, anxieties and concerns
• Ensure readiness for Implementation phase
Customer Onboarding Outcomes

- Implementation Form completed
- Basecamp opened and in use
- Milestone/key dates confirmed
- Alma (and Primo, if applicable) Sandbox provisioned
- „Getting to Know Alma“ 4-week training cycle completed
- ExL sftp server confirmed
- Provide sample data extracts for review
- Draft Migration Form submitted for review
- Draft 3\textsuperscript{rd} party integrations form submitted
- Planned approach for Authentication and SIS (patron upload)
Planning and Staffing
Planning and Staffing Your Project

• Know your Stakeholders
  • Who will be involved in the implementation, and/or impacted by the migration to Alma?
  • Who is likely to be supportive, and who might need more attention
Planning and Staffing Your Project

• Develop your communication plan
  • Who will need information about the implementation activities and progress? How often? In what level of detail?
  • What medium will you use to communicate? Consider an internal Basecamp or Wiki space
Planning and Staffing Your Project

• Form your team
  • Who will serve as functional experts during the implementation?
  • Make the Alma implementation a priority – this might mean shifting some responsibilities off core team members temporarily
Planning and Staffing Your Project

• Create a training plan and schedule
  • Document all current workflows
  • and practice in Alma (once sandbox is available)
  • Participate in relevant Alma training sessions (incl. preparation)
Data Migration Preparation
Data Migration Preparation - ILS

• Ex Libris ILS – Aleph and Voyager
  • Download auto-extract utility to generate migration form (and possibly extract data)
  • Non-Ex Libris ILS: previously migrated
    • See full list on Knowledge Center
  • Non-Ex Libris ILS: new
    • ILS is not in the list above
    • Will use generic migration specifications (also available on Knowledge Center)
Data Migration Preparation – Link Resolver

• Ex Libris – SFX and 360Link
  • SFX – download auto-extract utility to generate data extracts
  • 360Link – execute Management Reports
    • Database Details Report
    • Tracked Resources Report (or eBooks and eJournals)

• Non-Ex Libris – all others
  • Complete activations workbook
Data Migration Preparation – ERM

• Ex Libris – 360 Resource Manager and Intota
  • Generate Management Reports
    • Contacts
      • Cost Details Report
      • License Information Report
      • License Data Uploader
      • Notes and Comments
      • Resource Administration Information
      • Resource Renewal Reports
Data Migration Preparation – ERM

- Ex Libris – Verde
  - Download auto-extract utility to generate migration form and data extracts

- Non-Ex Libris – all others
  - Export License and Vendor Interfaces
  - Format data files in XML per the requirements
    - ERM to Alma Data Delivery Specification
Third Party Integrations
Third Party Integration Considerations

• Prioritize
  • What integrations do you have currently configured with your ILS?
  • What integrations do you need to have configured for Day 1/Go-Live with Alma?
  • Authentication and SIS/user management are considered critical path
Third Party Integration Considerations

• Simplify
  • Be realistic about what can be achieved during the implementation period
  • Consider whether there are integrations you currently use that will no longer be used with Alma
Third Party Integration Considerations

• Plan
  • All third party integrations (except API-based) can be configured in your Alma Sandbox
  • Identify any P1 integrations requiring IT resources early on
  • Test all P1 configurations before the start of Cutover
Next Steps and Support Resources
What You Can Do Now to Prepare

- Data Cleanup
  - See “Getting Ready for Alma and Discovery Implementation” on the Knowledge Center
- Review documentation and training sessions
- Form your project team and begin meeting
- Develop a library staff training plan
Resources on the Knowledge Center

- Onboarding
  - Getting Ready for Alma and Discovery Implementation
  - Technical Requirements for Alma and Discovery Implementation
Resources on the Knowledge Center

• Training
  • Getting to Know Alma series
  • Alma Essentials training series
  • Alma Administration Certification
Resources on the Knowledge Center

- Migration
  - ILS Migration
  - Electronic Systems Migration
Resources on the Knowledge Center

• Third Party Integrations
  • Integration with External Systems
  • Authentication in Alma
  • SIS
THANK YOU
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