



From Alma to Alma

Integrating a separate productive Alma into another productive Alma

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Michèle Dünki, Head Projects & Development
Stefan Kandra, Systems Librarian

Agenda

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SLSP

- 15 scientific institutions decided in 2015 to join forces to initiate **the future of information management** and create a launching platform into the future.
- Swiss Library Service Platform (SLSP) is a service provider for libraries and collaborates with them to run the national library platform swisscovery.
- The swisscovery platform hosts resources from more than 490 academic libraries in Switzerland (in total more than 40 million items), making information easily accessible and simple to find. On behalf of the libraries, SLSP invoices services provided by the libraries to swisscovery users.





Alexandria

Alexandria Library Network:

- 15 libraries and documentation services of the Federal Administration and other publicly funded institutions
- Coordinated by the Library Am Guisanplatz (1848)
- 1972 migrated from typewriter to swissbase. Quote: «a TIMS written in MUMPS»
- ~ 1996 migrated from swissbase to VTLS/Virtua
- Migrated from Virtua to Alma/Primo in 2013
- Migrated from Primo to Primo VE 2020
- ~ 15'000 internal patron accounts (Alma IdP)
- > 1 million titles/items, 30'000 Alma-D, 3000 local portfolios

Why did Alexandria join SLSP?

- Rather connect than doing their one thing
- Avoid a call for tender after 10 years of using Ex Libris products
- Become a part of the SLSP swisscovery catalogue
- Library am Guisanplatz reached out to SLSP to learn more about the services offered by SLSP and the possibilities to join
- Alexandria wanted to benefit from SLSP Services, networking and working closely together with other libraries
- Once the decision was taken, the project planning began.

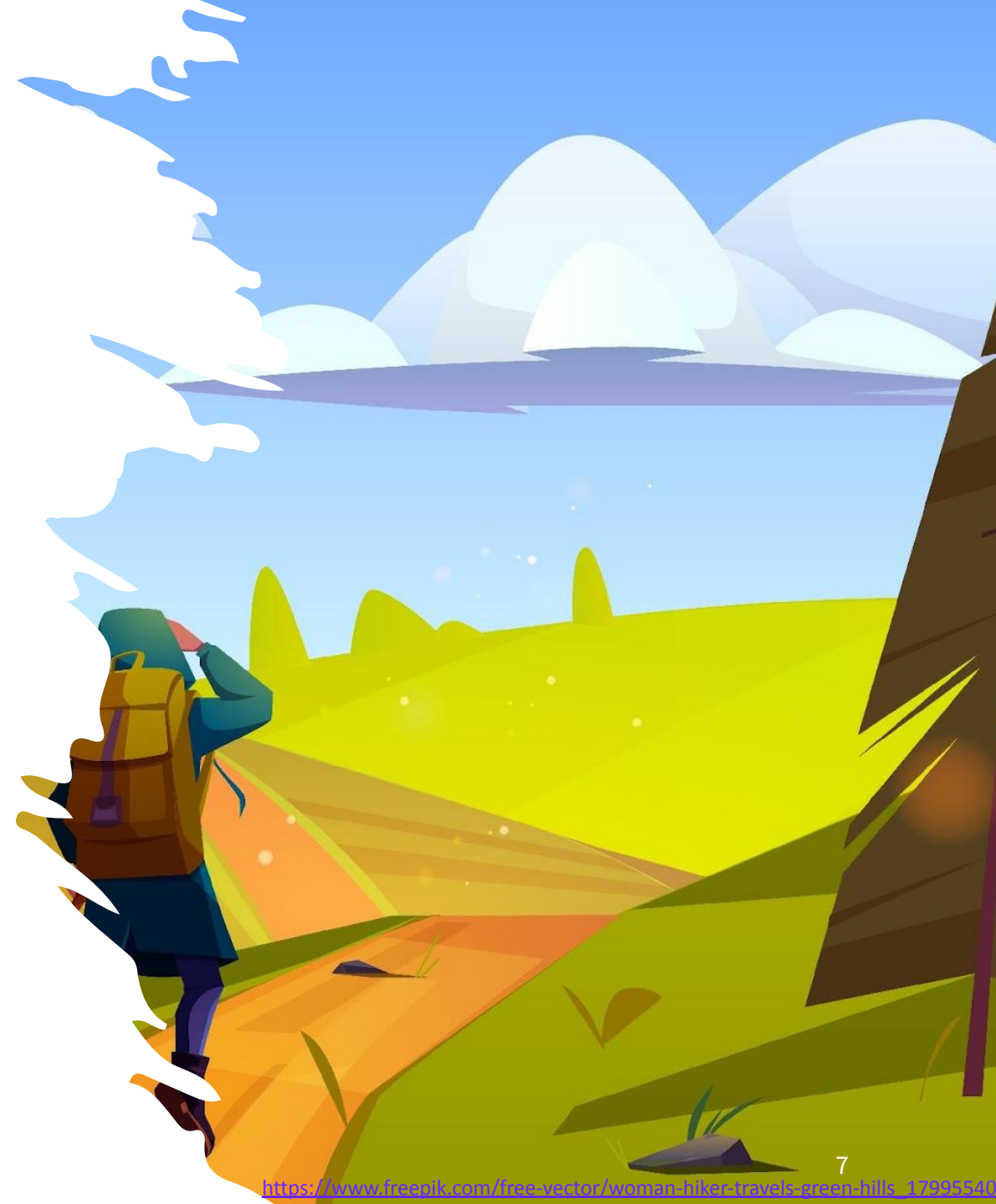


Hiking to Go-Live



Projectplan in Detail

- On Boarding
- Conceptual alignment
- Configuration and data
- Training Phase 1
- Test-Migration
- Staff User Management and User Communication
- Training Phase 2
- Cut-Over and Go-Live





Migration: Technical Prerequisites

Not many technical prerequisites from our side:

- DEDUP algorithm provided by swissbib (former data platform provided by the University of Basel)
- New IdP SWITCH edu-ID provided/connected by SLSP (switch.ch)
- Copy of Alma IZ by Ex Libris
- Migration to Primo VE and adjust local customization package with SLSP central package
- Change DNS, TLS-certificate, Integration Profiles (OAI)

Less-technical prerequisites (countless):

- Data cleanup, data enhancement, local data saving, patron communication, ...



Systems Librarian: Tasks

Bibliographic Data:

- Define and tag data that is either not copied in the NZ, or not DEDUPed with NZ records. Other records, only inventory was added, no merge, no overlay (discussions ...)
- Define and copy data to be saved to local extensions (7XX, 6XX)
- Many sets and many jobs ran

Fulfillment:

- Define new item policies per item (not location)
- Define dummy accounts for open loans
- Communication: Notify users job/letter

Acquisitions:

- Nothing to do

Many tasks have been carried out by SLSP (upon definition)



Let's go!

- OAI-export data to DEDUP against SLSP (swissbib algorithm)
- Alexandria IZ copied from EU00 to EU04 for test migration
- Alexandria IZ copied from EU00 to EU03 (SLSP):
 - Records linked to the NZ
 - New patron accounts (external) in the NZ
 - Electronic Collections distributed from the NZ
 - Letters (mostly) distributed from the NZ
 - Primo VE – labels, local fields (mostly), DEDUP/FRBR keys distributed from the NZ
- Not copied: Public Sets, Integration profiles where the CNAME changed



A first look back

... on the migration:

- Ex Libris copying an IZ instead of exporting/importing is a huge benefit. Technical tasks are significantly reduced.
- Migrating to a known system reduces training, post migration phase and saves nerves

... on SLSP:

- Moving from an IZ to the SLSP NZ has its particularities: NZ distributed functions, global configurations, ...
- Planning at the pace of SLSP
- An enorm growth in visibility
- Interposed support by SLSP, Intranet, Documentation, Forum, great community and experts!

Lessons learned

- Double-check that the TLS certificate is installed on the right server.
- Mutual understanding is key: both institutions have been using Alma before. They used some of the configuration/wording differently and Alexandria needed to align their concepts to the SLSP standards.
- Same goes for co-working with EXL!
- Open Communication: Regulated communication and defined ways – but also open channels between the project-team members helped a lot
- Spirit!

