



Avicenna Library & Learning  
Resource Centre

# Bye Heritage, Hello Alma

*Successful Migration at RCSI  
Bahrain Library*

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RCSI Bahrain

# RCSI Bahrain



- RCSI Bahrain is part of the Royal College of Surgeons in Ireland, an international medical university with campuses in Dublin, Bahrain, and Malaysia.
- It was established in 2004 as Ireland's first overseas campus for the Royal College of Surgeons.
- RCSI Bahrain offers undergraduate programs in Medicine and Nursing and postgraduate in Nursing.
- The university aims to provide world-class medical education and training to students in Bahrain and the region.
- RCSI Bahrain is in the Kingdom of Bahrain and serves over 1,200 students.

# RCSI Bahrain Library

- The RCSI Bahrain Library provides resources and services to support education, research, and practice.
- The library has a comprehensive collection of over 12000 print books and access to thousands of e-books and e-journals.
- Key resources include major medical databases like ClinicalKey, AccessMedicine, and UpToDate.
- Library services include literature searches, document delivery, reference management support, and information skills training.
- The library aims to facilitate access to quality resources for students, faculty, and researchers at RCSI Bahrain.







# BACKGROUND

With the exponential growth of digital information, we have been seeking innovative systems to manage electronic resources and provide collection services. The next-generation integrated library system (ILS) should address both current challenges and future demands. With that in mind, new cloud-based library service platforms (LSPs) like ExLibris Alma, OCLC Worldshare, and Folio were reviewed. Selecting and implementing a new system is a large task among these new products. The library system migration project from Heritage to Alma was undertaken to modernize the library system and provide improved services to library patrons. The project aimed to replace the outdated Heritage system with the Alma library management system, providing a more robust and next-generation platform.

# SCOPE

- The project's main scope was to migrate all data from the Heritage system to Alma, configure Alma to meet the library's requirements, test, train staff members, and ensure a smooth transition to the new system.
- Additionally, the EBSCO Discovery Service was replaced with Primo VE. The previous library portal was discontinued to reduce costs. To ensure continuity of service, developed a new library portal using the existing Springershare LibGuides. The proxy configured within the previous portal was also discontinued. So, locally hosted EZproxy was configured for off-campus access. Although we had a subscription to EZproxy, it required proper setup & configurations. Therefore, the temporary library portal and EZproxy were added to the project scope.

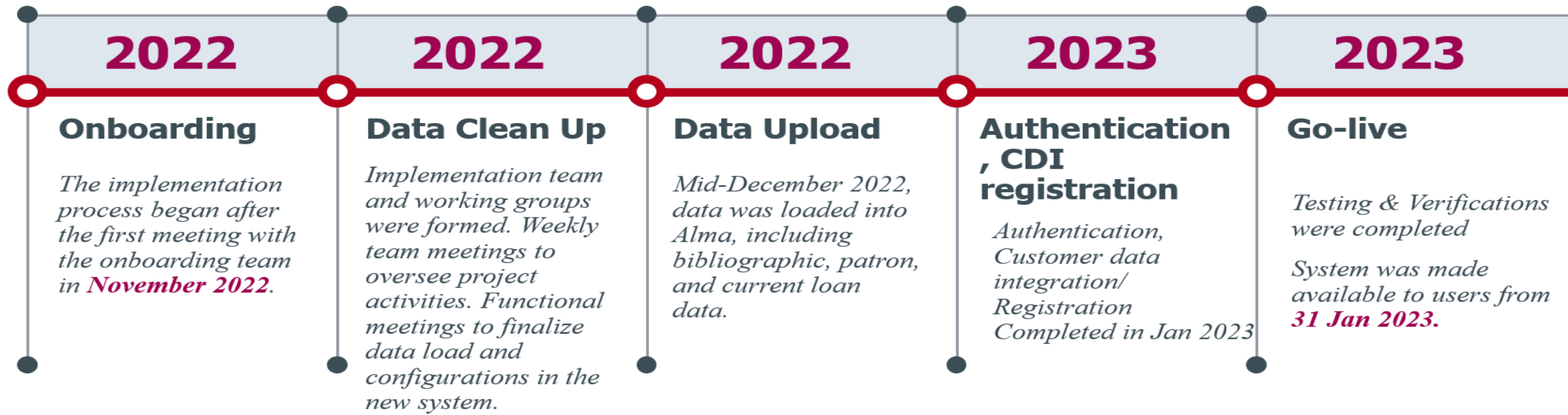




# RATIONALE

- The project provided the library with a more modern and efficient system to enhance user experience and workflow efficiency. The Alma and Primo solutions enable the library to unify the management of its digital and print resources, take advantage of the collaborative Alma capabilities, and present users with a coherent view of the services and collections that are available to them.
- Other reasons for selecting Alma:
  - Alma is a cloud-based system that provides a more flexible and scalable solution that can adapt to the changing needs of the library.
  - Alma offers robust functionality for managing electronic resources and digital content, which aligns with the library's expanding digital collection objectives.
  - Alma has a strong reputation in the library industry and is widely used by many academic and research libraries.
  - Library discovery service (Primo VE) was part of the Alma system, so no separate configurations are required.
  - Alma integrates well with other library systems, allowing the library to streamline its workflows and improve efficiency.





# Project Planning

- The planning phase defined the project scope, objectives, timeline, and team. The project was initiated in September 2022 with the approval of the business case, and the go-live date was set for January 31, 2023. The timeline was divided into various milestones to track the project's progress. The key milestones included data migration, system configuration, testing, training, and go-live.

# Project Timeline

Nov  
17

## Project Kickoff

Project started officially. First set of data shared

Nov  
18

## Data sample shared

First set of data was shared with implementation team.

Nov  
24

## Implementation team meeting

Lib and Exlibris implementation team met to set out further plans. GTKA training completed.

Nov  
28

## Implementation Kickoff

Implementation process start.

Dec  
15

## Data Migration

Migration data and forms to be ready.

Jan  
1

## Authentication

Authentication/Authorization Set up. CO Delivery.

Jan  
9

## CDI Registration

Customer data integration Registration Completed

Jan  
30

## Integrations and trainings

Essential Training, ProQuest Integrations, Fulfillment CO - AMO, Discovery Basic Set up, RFID Integration Set up.

Jan  
31

## Go live

Fine tuning continues

Feb  
6

## Review & training

Discovery Review & Refine, Functional Workshop.

Feb  
13


## Final touch

SIS / Patron Loader Integration, 3rd Party Integration.

Mar  
31

## Project Completed





Project  
Implementation  
Teams & Working  
Task Groups

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## RCSI Project Team

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Executive Management team

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Implementation Team

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Working Task Group

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## Ex-Libris Team

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Exlibris Onboarding Team

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Ex Libris Project Implementation Team



# Data Migration

Heritage Data Clean & Data Export (Pre-implementation Task)

Library physical holdings' final data were cleaned and exported from Heritage

Library users' final data were cleaned and exported from Heritage

Library current circulation data were exported from Heritage.

# Data Load to Alma/Primo VE

The data migration process from Heritage to Alma involved several steps, including extraction, cleaning, mapping, load, and validation.

- *Data Extraction*
- *Data Cleaning*
- *Data Mapping*
- *Data Validation*





# Data Load to Alma/Primo VE (Cont.)

The following tasks related to data load were done within the new library system to make it ready before going live.

- Heritage data (bibliographic, user, circulation) were loaded into Alma, and the implementation team provided the report.
- Physical item records were checked and confirmed with the implementation team.
- E-Resources collection was also checked, and found a few issues, which were communicated to the implementation team, and were fixed and verified.
- Users' data was also checked and confirmed.
- Final circulation data was loaded on 29-01-2023.



# System Configuration and Testing

Configuring Alma

Configuring integrations  
with other systems

The project's testing  
phase ensured the  
system's stability,  
reliability, and function  
approachability.

Issues during Testing

Issue resolutions and  
user acceptance

# ALMA & Primo VE Sandbox Access



Access to the Alma & Primo VE Sandbox (test environment) was acquired for practice and familiarization with the new system.





# Training and Change Management

The training for Alma/Primo involved a combination of online training resources and hands-on training sessions. Staff members provided positive feedback, appreciating the variety of training resources and the opportunity to ask questions and receive support. The library offered additional training and support for those who found the transition challenging, particularly those who needed to become more familiar with technology or had worked with the old system for a long time. The training and support were critical to the project's success, helping staff members adapt to the changes, feel supported, and proficiently use the new system.

# Training and Change Management (Cont.)

## Internal Staff Training

- Internal staff training was scheduled to introduce the library staff to the new library and train them per their job roles. The E-Resources & Systems Librarian conducted the internal training per the schedule. Also, all staff members were assigned user credentials to access the Alma/Primo Sandbox for practice.

Alma Overview	16-01-2023
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Fulfillment (Circulation)	16-01-2023
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User Management	17-01-2023
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Resource Management	18-01-2023
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Administration	19-01-2023
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# Training and Change Management (Cont.)

## Alma/Primo Workshop

- The ExLibris implementation team also conducted four days of training workshops after Go-live to guide the library staff about their perspective job functions and to make the best use of Alma/Primo to enhance their job performance using the new library system. The agenda and schedule of the workshop are given below.

Day	Topic	Date	Target Audience
Day 1:	Overview of the ALMA System & Cataloguing	13-02-2023	All Library Staff-Level
Day 2:	Acquisitions and E-Resources	14-02-2023	All Library Staff-Level
Day 3:	Fulfillment & User Management	15-02-2023	All Library Staff-Level
Day 4:	ALMA Administration and Analytics	16-02-2023	Only Admins



# Go-Live and Post-Implementation

Go-live process

Issue during the Go-live process  
- Primo login issue

Post-implementation testing to ensure

- stability
- Reliability
- system's performance
- Integrations
- user experience.

Primo Updates  
- Top menu buttons  
- Library quick links were configured

Training Sessions  
- Normalization rules  
- Analytics

Benefits of the new system

- workflow efficiency
- Improve user experience
- Streamlined several library processes
- Integration with other library systems
  - Discovery layer
  - Better authentication

# Post- Implementation Integrations

Several post-Go-live implementations were planned, including integration with the Student Information System, Financial System, Analytics, and Rialto. However, after consulting with the IT team, it was decided to drop the integration with the financial system (Aggresso). The remaining integrations were carried out as planned and completed within the project timeline from February to March 2023.

- Analytics
- SUSHI Usage Reports
- Link Resolver
- Augmentation
- LibKey.io
- Google Scholar
- Student Information System (Quercus)
- Rialto (In Process)

# Lessons Learned and Recommendations

- The project provided several valuable lessons for future projects.
- ✓ The importance of collaboration between the project team, library staff, and the vendor. Close cooperation and communication ensured that the project was completed on time and met the library's requirements.
- ✓ Additionally, the project highlighted the importance of thorough planning and testing to ensure the system's stability and reliability. Future projects should allocate sufficient time and resources for testing and quality assurance.
- ✓ Finally, the project recommended that the library continue evaluating and refining its workflows and processes to ensure the system's optimal use and benefit. The library should also consider investing in user training and development to ensure staff is fully proficient in using the new system.
- ✓ The Alma/Primo VE library system migration project has successfully leveraged its strengths and opportunities. The challenges related to data migration and the learning curve have been addressed, leading to improved library operation and user experience. Ongoing vigilance is necessary to address potential technical issues. Overall, the project's completion has positioned the library for long-term success in providing efficient and user-friendly library services.
- ✓ In conclusion, the project was a great success, and the migration to Alma has enabled the library to improve its services and operational efficiency.





# Supplier/Vendor Feedback

"Alma implementation in RCSI-MUB was the fastest implementation in the region, if not in the whole company, and if this represents anything, it represents how dedicated, skillful, and helpful the library team was to get this successful system implementation.

Working with Dr. Bindhu and Asif on this implementation was smooth, professional, and easy to do business with, showing their expertise to the RCSI-MUB library". Tawhid Al Sharif, Senior Account Manager – Clarivate.



"Working with Asif, Dr. Bindhu, and the other colleagues was wonderful. You managed to go live with Alma and Primo VE in a short time. The quality of your data, good strategic planning for your library, and your team's focus on the most important functionality made it all work. The motivation and effort you all put into this project were something to remember. I even received messages on Friday - to which I had to reply, 'You should have a weekend now!'. Jacobijn Kiel, Project Manager, ExLibris Implementation Team – Clarivate



# Conclusion

- The migration from Heritage to Alma was a significant project for the library to improve its operations and services to users. The project's objectives were to replace the legacy system with a next-generation cloud-based system, streamline library processes, and provide a better user experience. The project's scope involved data migration from Heritage to Alma, configuring the new system, testing, go-live and developing of new library portal and EZproxy service.
- The project successfully achieved its objectives, and the library now benefits from the new system. The Alma system has improved workflow efficiency, provided a seamless user experience, and enabled the library to make data-driven decisions.



**Thank you**