

Guiding Principles of Migration and Ex Libris Alma and Primo

Ex Libris Alma and Primo provide CLIC with many opportunities not only to migrate our system, but to update our practices, processes, policies, workflows, and thinking to embrace current and future library trends. This work will facilitate our transition to budgets that are increasingly devoted to a wide range of electronic resources, as well as enable us to improve discovery of these resources. Some examples of areas where it might be beneficial to challenge our old ways of thinking include: our need for tracking and maintaining our print resources has changed; our acquisitions and description/cataloging of materials have changed to accommodate electronic, particularly ebook and streaming media packages (like ejournal packages in the last three to five years) which are largely uniform products purchased widely and can rely on sharing/collaboration for description and access; our fines and circulation structures are designed for print-based and highly mediated libraries; and so forth.

Our time in libraries is spent on such a wide variety of tasks and resources that continue to grow and develop that we must make every effort to optimize our system to free up time of library staff to explore and expand library services to match the current and future needs of our faculty and students, particularly as we are asked to do more with flat and decreasing budgets.

1. Prioritize staff time. Implementation will take A LOT of time.
 - a. I-Team two hours weekly.
 - b. Local I-Team one hour weekly.
 - c. CLIC committees monthly to weekly depending on timeline.
 - d. Implementation is an ongoing and constant endeavor which needs quick quality responses.

2. Use the system as intended.
 - a. Use KB metadata, not MARC records, to describe our e-resources to the fullest extent possible.

“By integrating the CKB (Central KnowledgeBase) into the data services environment, Alma allows libraries to eliminate the need to manually synchronize the titles of electronic resources into the local catalog. When a complete or partial package is activated in the CKB, the individual titles in that package are immediately indexed and available in the library’s inventory.” -- [All You Wanted to Know About Resource Management in Alma](#) (p. 6)

- i. Record limits are in place and creating/loading e-resource MARC records should be the exception. Suggested action: Create a policy.

- ii. Advocate with vendors (ExLibris and content providers) to improve and develop the KB. Suggested action: Create a centralized and inclusive process.
- b. Use Network Zone to avoid duplicating work (vendors, licensing information, codes).
- c. Minimize Alma workflow exceptions.
- d. Re-evaluate current and proposed workflows to optimize use of new system.

“As an ‘exception-based’ system, Alma is designed to automate metadata creation and management workflows as much as possible, and there are a number of ways for metadata to enter the system. Manual entering and management of individual records should be regarded as ‘exceptions’ in Alma, special cases that require staff expertise.” -- [All You Wanted to Know About Resource Management in Alma](#): (p. 17)

- 3. Simplify policies and related codes (patron, location, circulation, etc.).
- 4. Follow Ex Libris’ recommendations.
- 5. Challenge ourselves to think beyond current workflows, silos, and policies.

“Alma is designed to provide great flexibility in the ways institutions and consortia manage their cataloging, by providing the ability to manage both local holdings and collections as well as shared resources (e.g. resources from the consortia or from the broader Alma community). And, unlike other cloud-based services, which are based on the older MARC standard, Alma is designed to be format-agnostic to ensure support not only for the metadata formats that libraries manage today, but to ensure support for new formats in the future.” -- [All You Wanted to Know About Resource Management in Alma](#): (p. 5)

- a. Ask yourself ‘Do I/we have to do it this way?’
 - i. If yes, document the reasoning so it can be shared.
- 6. Understand indexing and mapping as these tools facilitate discovery.
 - a. Representatives from public and technical services need to develop expertise in indexing for discovery.
 - b. Support and resources will be provided as necessary.
- 7. CLIC instances of Primo maintain a uniform **technical** configuration for a period of no less than one year.
 - a. Primo has many customizable features, it will be helpful for institutions to have "common ground" at the beginning in order to work collaboratively through any

early issues. We imagine that troubleshooting issues as we get started with Primo may be more difficult if we have to account for different customization.

8. Take advantage of and participate in the ExLibris user community. Alma/Primo is a system in continuous development leading CLIC to embrace a culture of continuous evaluation, participation, feedback.