System Migration to ALEPH

Lessons learned at Emory from a migration implemented in under 12 months

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Who we are:

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The decision to migrate

- Why did we make this change anyway?
  - Many years on one system – several versions behind
  - Other products with different vendors – integration concerns
  - Discovery layer – complexity of collections
  - Setting up a move to Next Gen system
The decision to migrate, cont.

- Why we picked Aleph:
  - Improved Primo (discoverE) functionality
  - Potential migration to Alma
  - Hosted, no longer local
  - Suite of products from ExLibris (Primo, SFX, Metalib – ease of integration)
What makes our experience unique

- Architecture different, but same functionality – lateral move
- Not a game-changer; moved for structural reasons to support tools that work with the ILS
- We did not take a multi-year approach
- No “hook” for staff – motivational factor
Why we’re here – some background

Workflows - SirsiDynix

- Graphical, flexible and intuitive
- Allows for a great deal of customization
- Can be set up by staff member and for desk workers
Challenges to the conversion

- Fusion of text and tool
  - Notices
  - Holds and recalls
  - Customization of OPAC
  - Reports
Challenges: Modifying notices in Sirsi v. Aleph
Challenges:
Placing a hold/recall in Sirsi
Challenges:
Reports versus Services
Challenges: Reports versus Services cont.
The conversion process and it’s challenges

- Changes to the data architecture
- Many libraries in the Emory system with diverse needs
- Connecting to 3rd party systems
- Tools for data reporting
- Automation – notices, reports
Challenges to the conversion, cont.

- Abbreviated timeline
- Lack of sufficient richness of any test environment / short lifecycles for testing
- Emory’s decentralized environment
- Mid-semester live date
- Post – STP project work (SFS, EDI, LTI)
Challenges: Staff Resources

- Staffing levels
- Project staffing
- Staff skill set “pool”
- Existing systems support and development landscape
- Administrative turn-over
Staff Resources: Project Teams

Subgroups for:
- Marketing/outreach
- Testing
- Training
- Documentation
How it affected our patrons and services

- Mid-semester rollout
- Notice issues
- Patron-empowerment features
- Fines/SFS feed
- Loans/holds (reset clock)
- Primo v. EUCLID
- Outreach to patrons
Challenges: Customization of the OPAC

- 16 years + lots of systems knowledge = highly customized and robust OPAC
- Creation of high benchmark for patron service
- Primo divided the development focus
- Primo became the primary focus with ALEPH and the native OPAC was largely left out of the box
- Presented to challenges to keeping patrons directed to the “right” place to find materials
What we learned

- 10 months isn’t enough time to ensure an optimal transition
- To ensure success, you need to consider the existing staff culture and how change is handled
- Need to set up successful working relationships with outside partners – registrar, financial services
- Opportunities for collaboration
- Prioritization and growth opportunities
Any questions?

Thanks for coming!

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