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Alma/Primo Management in a Post-Migration World

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ALMA/PRIMO MANAGEMENT IN A POST-MIGRATION WORLD

Kate Seago, Director of Acquisitions, University of Kentucky

Julene Jones, Head, Database Integrity, University of Kentucky

eBUG 2017

June 16, 2017



AGENDA

- Migration Task Forces
- ILS Committee
- Communication to Staff
- Discussion Questions

MIGRATION TASK FORCES

- Migrated from Voyager ILS (2000-2015)
- Schedule: 6 month migration, went live January 20, 2016
- 4 Task Forces: Alma Migration, Primo Implementation & External Systems Implementation TF, overseen by Alma/Primo Project TF
- Communication with & training by Ex Libris
- Documentation posted on Sharepoint sites for each TF

ILS COMMITTEE – CHARGE CHANGE

- Charge: To provide advice on the functions provided by the current Integrated Library System including (OPAC, acquisitions, cataloging, electronic resource management and fulfillment); to review documentation on new releases and recommendations on implementation; and to assist in library staff ILS education.
- Hiatus for Fall 2015 while the Alma/Primo Task forces worked on the migration.

ILS COMMITTEE - COMPOSITION

- Representation from Circulation, Law, Medical Center, Collections and Technical Services, Branches, Public Services
- Ex officio
 - Tari Keller, Systems
 - Kate Seago, Director of Acquisitions
 - Terri Brown, Circulation

ILS COMMITTEE – DECISIONS SPRING 2016

- Approved policy for the use of Inventory Number field for Storage Box numbers
- Approved the removal of the redundant |z Click here for internet access in Primo
- Approved additions and changes for the Education Juvenile Collection locations
- Reviewed and provided input on the Alma enhancements and ELUNA Steering Committee
- Compiled a list of outstanding issues for new incoming committee in Fall 2016

ILS COMMITTEE DECISIONS FALL 2016/SPRING 2017

- Composition of the group changed slightly adding representation from Special Collections, Database Integrity, Director of Cataloging, Medical Center, Law Library, Fine Arts (Branch) as well as the ex officio Circulation, Systems and Acquisitions.
- Major Accomplishments are the revisions of the Special Collection locations, the Primo Survey and communication plan, evaluating StackMaps and participation in the enhancement process.


ILS COMMUNICATION TO STAFF

- Goal: Inform, not overwhelm!
- Sharepoint
- Additional training
- New Primo UI survey
- Forward many of the Ex Libris emails

ILS Committee

Shared Documents

Type	Name
Folder	Meeting Records and archival documents
Folder	NEW Primo UI Survey
Folder	Alma Primo Information
Folder	ILS Annual Reports
Folder	ILS Locations Procedures, Documents, Comments
Folder	Alma local training
Folder	Policies
Folder	DRAFTS
Folder	Voyager
Document	Alma enhancement process and voting
Document	Changes to InfoKat Display



Links


- [Link to MARC 21 Formats](#)
- [Ex Libris Knowledge Center](#)
- [ELUNA-Ex Libris Users of North America](#)
- [eBUG conference](#)
- [New Primo UI \(Jan. 2017\)](#)
- [Alma](#)
- [Alma Sandbox](#)

NEW PRIMO UI SURVEY

- Implementing new Primo UI (User Interface) in summer 2017
- Goal: Needed feedback on new, most-impactful features
- Planned to do some customization before go live, then gradual fine-tuning
- Survey asked about 3 specific features, then likes and dislikes
- Contact us if you'd like to see our results!

EMAILS FROM EX LIBRIS

SUPPORT TEACHING & LEARNING
HOW CAN YOUR LIBRARY BETTER
SUPPORT INSTRUCTORS?




[REGISTER NOW](#)

Live Webinar:
**Getting More Involved with
Course Materials and Reading Lists**

[Join tomorrow's webinar](#) on June 1st at 1PM EST to find out how your library can get more involved in reading lists and affordable course materials. This event will overview the key Leganto features that make instructors, librarians, and students love reading lists.

Want to learn more now?
Watch our short video:



on 5/21/2017 9:51 AM

Alma News <AlmaNews@exlibrisgroup.com>
Alma June 2017 Release Highlights



Dear Colleagues,

Our last release before Alma's **5th** birthday next month. How quickly the months and releases have gone by. So many new features have been added to Alma during these years – many of them originating from you – the Alma community – as **NERS** enhancements or as ideas posted to [Idea Exchange](#).

We are very excited to report that with the **June Release** the **ALMA New UX Focus Group** will have access to the new UX. In the coming months the new interface will also be made available to the whole Alma Community. Be sure to check the UX Rollout Plan [here](#).

Don't forget to take a look at our [July Sneak Preview](#). Our likes for July are the ****NERS**** enhancement related to **Expanded Repository Advanced Search Options** and the ****Idea Exchange**** item - **Read Only Attribute for Administrator Roles**.

What's new in the **June 2017 Release**?

Resource Management

- **General Publishing Physical Inventory Enrichment Parameters Expanded** - The

DISCUSSION QUESTIONS

- How are you handling monthly updates in Alma?
- Have you implemented or customized the new Primo UI? *next session in I 63 B
- How are you keeping everyone informed about system decisions / updates / announcements?
- Are you happy you migrated?

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