

Alma Post-Implementation at the Colorado School of Mines

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COLORADO SCHOOL OF MINES

“Go Live is Only the Beginning”

Agenda:

- Who We Are
- Implementation In Theory
- Implementation In Practice
- The Future

Who We Are



Colorado School of Mines

Engineering, applied sciences university

Undergrads, Grads, Faculty, Staff, Community
Members

CARL → Voyager → Alma

One campus

One library

20 staff

7000 patrons

600,000 Physical & 400,000 Electronic titles

Challenges Being Faced (2014)

Other campus functions moving into Library

Budget cuts

Loss of staff positions

Outdated workflows

Growing demand for efficiencies

Physical to electronic shift

Expanded user expectations

Voyager's limitations

Implementation Timeline

Contract signed April 2014

Mines PM & library team assigned April 2014

Pre-Implementation April – December 2014

ExL project team assigned Dec 2014

Kickoff Jan 6 2015

Implementation Jan – May 2015

Go Live June 4 2015

Expert Optimization Nov 2015 – Feb 2016

Implementation In Theory



An Organizational Project

Implementation more than a technical project

It is an organizational project as well:

- If metadata exist, use them (CZ)
- Automate ordering
- Implement shelf-ready
- Simplify Electronic Resource Management
- Extend and enhance patron services

But as we know, change is hard...

Alma as a Tool for Change

We know change is hard

Alma implementation is an opportunity!

The centralization of technology:

- Formerly complex, disjointed systems topography

The de-centralization of knowledge:

- Alma's consolidation, automation and unification promotes extending and sharing knowledge and skills, and the devolution of tasks

Realizing Full ROI of Alma

Understand Alma's business processes

Use automation to streamline workflows:

- Implement exception-based workflows
- Workflows managed from within the system
- Minimal human intervention needed

Optimize via external systems integration

Empower staff to be self-reliant, improve skills
and expand their focus

Implementation In Practice



Implementation

A frantic and stressful time

Not enough bandwidth to “do it all”

Configuration and other decisions made when full impact not completely understood

Hard to make significant changes to workflows prior to Go Live

A post-implementation business process “health checkup” would be a valuable tool

6 Months Post-Implementation

Contentiousness between sections and dissatisfaction with some aspects of Alma

We self-identified a few major problems and a lot of minor issues (Other problems would be identified during Expert Optimization)

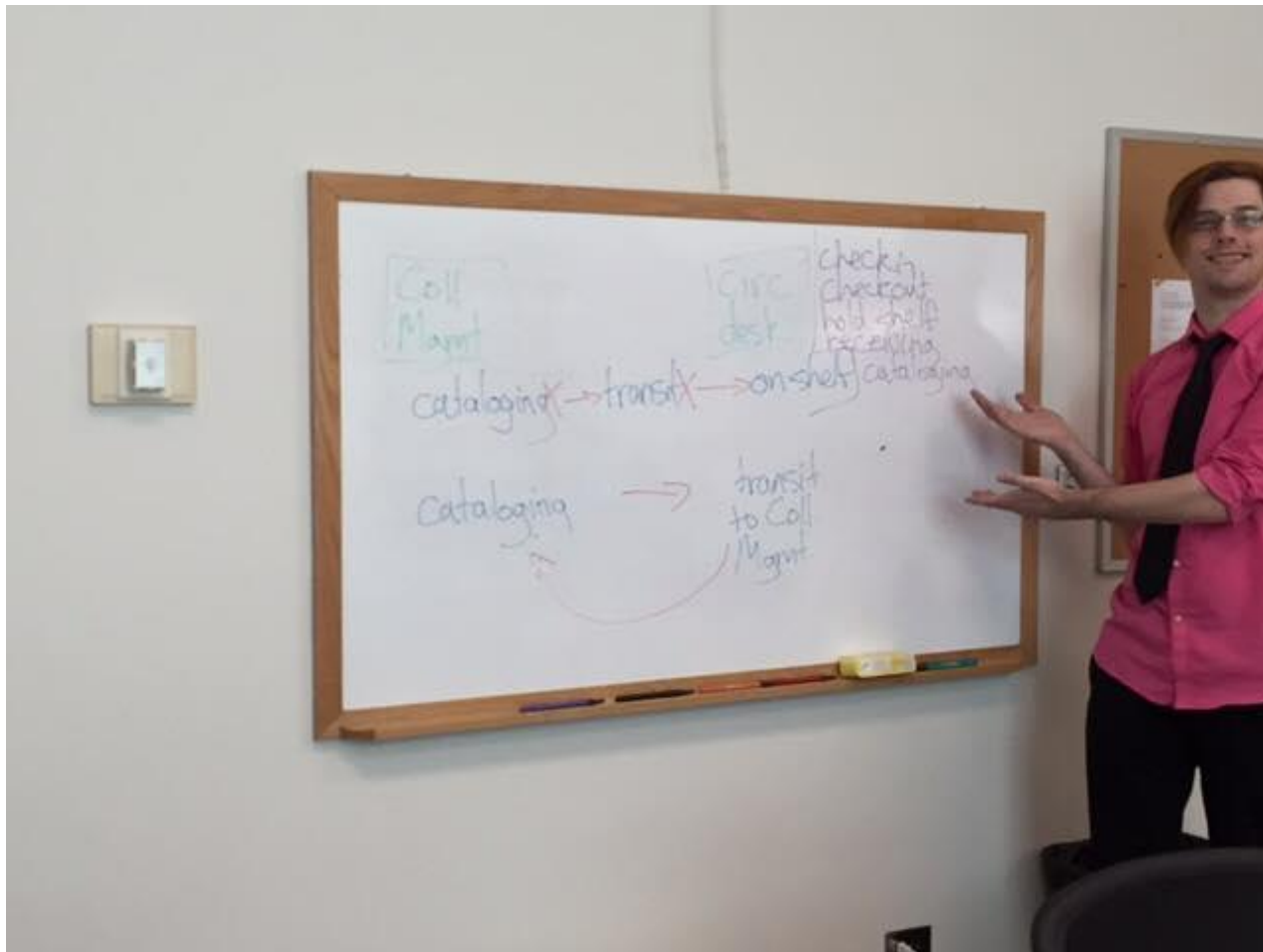
The Director wanted us to optimize workflows and processes as part of a “reorganization”

Needed to revisit some migration decisions

We all knew things could be “better”

Who could help?

Enter John Larson!



Expert Optimization Scope

Focus on Technical Services and Fulfillment

Analyze workflows

Identify problems, recommend solutions

3-Day Analysis Session

Recommendations and Work Plan Report

2-Day Configuration and Training Session

Final Summary Report with detailed
recommendations and execution plan

Optimization Results

Implement YBP Shelf Ready

Fix Work Orders; Eliminate In Transit; Simplify
“Desks” down to one

Resolve Course Reserves Issues

Resolve Alma Printing Problems

Workflows for Missing Items, Archival Materials

Streamline E-Resource workflows

Implement new patron services

The Future



Going Forward

Expert Optimization gave us a model to follow

It was incredibly helpful and successful

Realize implementation part of a progression

Momentum for continuing advancement

At six months the timing was perfect (for us)

Ultimately change becomes the norm

One Year Post-Implementation

Automating repetitive tasks

Other external systems integrations

Community patrons issues

Digital repository issues

New services implementation & marketing

Vision for the Future

PDA/DDA

Continue improvement of ERM

Research data

Keeping up with Ex Libris' new directions

Vision for the Future

Expand auto-renewal to all

Single-point requesting

Unfillable requests to purchasing

Bookings for archival materials

Extend patron services

Vision for the Future

Evaluate and document best practices

Maximize training and knowledge

Governance of Alma and Primo

Devolution: Staff changes & future directions

Thank you!

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