

Saint Mary's College of California

Saint Mary's Digital Commons

Staff Works

Scholarship, Research, Creative Activities, and
Community Engagement

12-15-2022

From Sierra to Alma: a transformative experience at Saint Mary's College of California

Elise Y. Wong

Follow this and additional works at: <https://digitalcommons.stmarys-ca.edu/staff-works>



Part of the [Higher Education Commons](#), and the [Library and Information Science Commons](#)



This work is licensed under a [Creative Commons Attribution-NonCommercial-No Derivative Works 4.0 International License](#).

**From Sierra to Alma:
A transformative experience at Saint Mary's College of California**

Elise Y. Wong

Abstract

This article describes the process of Saint Mary's College of California (SMC) Library in selecting the new Integrated Library System (ILS) and migrating from Innovative Sierra to Ex Libris Alma/Primo VE. This article provides an overall picture of key migration events, tasks, and implementation efforts in the ILS migration journey for a solo academic library.

July 12, 2022 was a milestone date for Saint Mary's College of California (SMC) Library. On this day, Alma, (the Integrated Library System powered by Ex Libris, part of Clarivate) went live and signaled the end of Innovative Sierra's era at the SMC Library. The Integrated Library System (ILS) migration project from preliminary planning to implementation took one and a half years from Dec 2020 to July 2022. Three weeks after the new ILS go-live, the SMC ILS taskforce and the Ex Libris team signed off on the implementation project, when both parties were satisfied to declare that, despite the expected challenges, the migration was a success. In the next six months, the Library will continue to attend internal training and refine existing operation workflows that will enable the new ILS to work efficiently for library staff and campus community. This article recaps the ILS migration journey for a solo academic library (as opposed to a consortium) in hope that their experiences are informative to other libraries that are investigating or planning an ILS migration.

Addressing the question

Saint Mary's College of California is a private, liberal arts College with 3200+ students and 205 FTE faculty. SMC Library has 11 librarians and 9 support staff. Saint Mary's had been an Innovative Library since the beginning of the online public access catalog in the 1990s when the Library transitioned from a physical card catalog to the online format. The Library adopted EBSCO Discovery service in December 2011. The Library collection has since expanded to include resources such as ebooks, electronic journals, streaming media, electronic articles and databases. After 25 years since the launch of the first online catalog, the Library is ready to invest in a sustainable system that will allow library staff to work with a diverse set of resources.

In December 2020, the Library formed a taskforce to evaluate the current Integrated Library System, Sierra (powered by Innovative, part of Clarivate), as well as to look into a new Integrated Library System to potentially replace Sierra. The ILS selection taskforce was charged to answer three questions:

- Do we need to implement new ILS?
- What are the costs of a new ILS (migration, training etc.)?
- If we stick with current ILS, what can we do to improve Sierra?

The taskforce held listening sessions to solicit input and feedback on the different functionalities in Sierra: public user interface, access services, technical services, and reporting/evaluation. All library staff were encouraged to weigh in on the following prompts:

- What are some workflows or features you enjoy in Sierra and would like to see in a future system?
- What are some workflows or product features that prevent you from using Sierra effectively?
- What would you like to see in a future system?

The selection phase

For the next three months, the selection taskforce surveyed six major ILS vendors currently on the market: EBSCO FOLIO, Ex Libris Alma, OCLC WorldShare Management Services (WMS), TIND ILS, SirsiDynix Symphony, and Innovative Sierra. The taskforce members also reached out to peer libraries and asked for insights on their current ILS and ILS migration experience, if they had any. Between April and August 2021, three ILS products (Alma, FOLIO, WMS) were selected to be the finalists for vendor presentations before the library staff. The taskforce focused their assessment in these core areas:

- Cataloging: record management; batch processes; integration with external bibliographic utility e.g. OCLC
- E-Resources: Linked data; management system/KnowledgeBase; link resolvers and proxy servers
- Acquisitions: ordering workflows; fiscal fund structure, and integration with third party vendors e.g. GOBI and Midwest
- Circulation: resource sharing integration with affiliated consortia; patron load integration; course reserve integration with 3rd party application e.g. SpringShare
- System: reports/statistics generation; SAML Single Sign-On authentication; Discovery layer, UX functionality; integration with campus learning, financial, and student systems (e.g. Moodle, ImageNow, Colleague)

In September 2021, the taskforce announced that Ex Libris had been selected to submit a formal ILS proposal to the library to adopt the Alma library services platform and Primo VE discovery system. Alma is identified as the best fit for the needs of SMC Library because of its cloud-based design, open platform interoperability with campus systems, analytics reporting, e-resources management, and resource sharing integration platforms. Alma is used by many peer institutions. It is tailored to academic collections and will increase access to other academic libraries and expand research capabilities. Two months later, SMC Library officialized their agreement with Ex Libris to implement Alma and Primo VE in July 2022.

The implementation phase

Alma/Primo VE was anticipated to go live at SMC Library on July 12, 2022. The implementation taskforce began the “onboarding” prep work in December 2021. The taskforce had weekly (virtual) meetings with the Ex Libris team and used Basecamp as a project

management tool. During the onboarding phase, the taskforce discussed processes, tasks, and deadlines before the implementation kick-off in February 2022. During the implementation phase, the SMC implementation team delivered data for test load and began system configuration for Alma/Primo VE. All public and technical services library staff also completed a series of synchronous functional workshops with an Ex Libris consultant. The month before the go-live date was a critical countdown period. To avoid any complication, the implementation team performed an early fiscal close in Sierra. Once the final (except patron/circulation) data was extracted prior to system cutover, all technical services activities in Sierra were frozen until Alma go-live. Access Services continued their operations in Sierra until two days before go-live when they switched to an offline circulation module.

After Alma and Primo VE went live on July 12, 2022, the implementation team continued to work on final technical configurations for the next three weeks. Once the implementation project was signed off by the Ex Libris professional services team, SMC Library was formally handed off to the general customer support team. Access to Sierra was retained until the end of September. On the SMC Library website, Primo VE went live in the beginning of August, while EBSCO discovery service was removed and would become offline at the end of August.

New resource sharing platform: Rapido

The end of Sierra also meant that SMC Library was no longer using INN-Reach, the resource sharing product from Innovative. In early April 2022, SMC Library signed up with Rapido, the resource sharing platform from Ex Libris that is integrated in Alma and Primo VE. Rapido would allow SMC to have access to more academic resources, including access to California State Universities collections. Included with Rapido is RapidILL, the interlibrary loan service for non-returnables such as book chapters and articles. After Alma and Primo VE went live on July 12, the Rapido implementation team began their work with another Ex Libris team. As of this writing, Rapido is scheduled to go live in Alma and Primo VE on August 29, 2022, the first day of fall term at Saint Mary's College.

Lessons learned and takeaways

The Alma/Primo VE implementation phase ended three weeks after go-live and Saint Mary's interaction with Ex Libris was officially switched over to general customer support. Looking back at the migration journey, both the SMC and Ex Libris implementation teams felt that the experience was gratifying. For small academic libraries that are planning their ILS migration, the SMC team recommended paying particular attention to the following processes:

- Data cleanup pre-migration
- Weekly meetings (internal and external)
- Technical configuration and 3rd party integrations
- Functional training/knowledge
- Communication to internal and external stakeholders

SMC Library performed extensive data cleanup on all record types after the test load. Thousands of outdated data were purged. The SMC team also made the decision to not migrate

electronic resources for which we do not have perpetual ownership. The final catalog record count dropped from 747,000 to 216,000 for the final data load. The Cataloging team adjusted several MARC fields to ensure that data were mapped, indexed, and displayed correctly in Alma. Technical configurations in authorization, authentication and third party integrations were challenging because of system technical jargon and involvement with other campus stakeholders. In addition to the weekly meetings with the Ex Libris team, the SMC implementation team also had weekly drop-in discussions and functional training sessions which were open to all library staff. An internal Google site was used to share training resources and procedural documentation. Communications to the campus community were planned in advance to ensure transparency and minimize confusion.

Looking ahead

In the next six months, the SMC Library teams will continue to attend training and refine existing operations and workflows that will enable the new ILS to work efficiently for library staff and campus community. Some ongoing tasks include:

- Data cleanup post-migration
- Functional training/knowledge
- Workflow reassessment
- User experience and communications

After catching up on the backlog from the month-long technical freeze period before the Alma go-live, the technical services staff will continue to review migrated data and perform cleanup as necessary. Once we are familiar with Alma functionalities in terms of the day-to-day operations, we will begin exploring the electronic resources licensing management and advanced analytics in Alma. All existing workflows will be reexamined and documented on our Google site. Presentations, tutorials, and research guides will be available to inform and educate the campus community on using the new library search interface. Library staff are prepared to be patient and compassionate towards one another as we work through the hurdles. We hope to launch a campus usability survey that would provide feedback on user experience with library services and the new library system.

The last eighteen months have been a transformative experience for the SMC Library. The Library staff reframed their mindset as to what a modern Integrated Library System is (and should be) capable of achieving in a contemporary academic information environment. For libraries that are investigating or planning an ILS migration, it is crucial that the decision to invest in a new ILS should be based on funding, priority, and most of all, input from all library staff. The ILS implementation team needs to distribute responsibilities (and accountability) equitably, and communicate possibilities before making collective, informed decisions that shape the new ILS in the long term.