Take It or Leave It: Preparing to Migrate Acquisitions Data

Abstract

A new ILS is a new opportunity to examine and evaluate existing data. The University of Tennessee Libraries planned to conduct an extensive review of acquisitions data in preparation for migrating to an Ex Libris Alma system this year. We wanted to determine: what acquisitions data should migrate to a new ILS? What should be the decision points for migration and what would be the issues and implications associated with these decisions? We knew that some data clean-up would be a given, but what projects should be prioritized and why? This poster session will report on the process and decisions made at the University of Tennessee Libraries and report on the outcome of our migration – what we learned and what we would have done differently.

The situation

Migrating from an Ex Libris Aleph system (2004) to an Ex Libris Alma system.

Timeline:

- Apr. 28th- The migration team was formed and the Alma implementation plan was shared with the team.
- June 12th- Kickoff meeting with Alma team & UTK migration team.
- June 16th – Aug.8th-worked on completing the conversion forms.
- June 16th – UTK migration team given access to the Alma sandbox.
- June- started working on data clean-up projects.
- Aug. 29th-Received our data in Alma and started testing.
- Go live date in Alma is December 18, 2014.

What did we migrate?

All orders, vendors, and budgets – even closed orders. Why did we choose to migrate everything?

- Our vendor gave us the choice of migrating everything or nothing. It was really no choice.

UT LIBRARIES

We were happy to keep historical info for these purposes:

- Ability to hook continuing hosting fees to one-time database purchases.
- Retain experience with vendors. Examples: we already unsuccessfully tried a vendor for a particular item and closed the order; some publishers don't work with certain vendors; some vendors are non-responsive.
- Meet auditing requirements.
- Retain the ability to compare previous years with current years.

Size of Data

- Vendors migrated – 2,826
- Invoices migrated – 55,079
- Orders migrated – 291,792
- Current funds (budgets) migrated – 428

What we streamlined before migration

- Budgets – we reduced our budgets to 428 from a record 601.
- Budget naming – we dropped the year from the fund name.

What our system will streamline for us

- Ordering from YBP
- Tracking the transfer of titles in some of our e-journal packages
- OCLC downloading
- Integration with campus financial system
- End of the month financial reporting
- Providing access to e-books as part of the acquisitions process
- Budget balancing and reporting
- Analytics

Migration problems and surprises

Orders

- We had some problems with mapping of order types that have the potential to prevent ability to check in, claim, auto-close.
- We had multiple orders in electronic and print formats on the same bib – when multiple orders were attached to a bib record only one was converted to electronic format. All other orders attached to the same bib record were converted as physical.
- Some info (like our order log) did not migrate.
- We used our current system to store info (maybe in a field not designed for that purpose) and there was no good place to map that data.

Vendors

- We didn't know there was only one shot at vendor migration. We "trained" on our sandbox vendor data and may have corrupted the data. We continued to update data in our current system thinking that these changes would migrate.

Budgets

- The migrated budgets do not sort and display in the way we need and we may need to rename.
- We didn't understand mapping options and our budgets did not migrate as we need them.

Record loading

- Our previous system let us store vendor-supplied invoices and records on the server until we were ready to load. Our new system does not, and we will need to run an ftp server.

Preparing to migrate vendor services

Our biggest vendor, YBP, has done Alma migrations before. We are relying on their help.

Points to consider:

- Establishing a cut-over date for new services. May not begin new services at initial production date.
- Setting up a test account.
- Asking for a roadmap to profile system for EDI invoicing.

What we learned

- A system migration is always a learn-as-you-go process, even if you've migrated systems before.
- Be sure that you understand terminology. What your current system calls a standing order may not be what the new system calls a standing order.
- Find out what you can change after the initial data review and what you cannot change after the initial data review. Set your priorities accordingly – will it be easier to clean up before or after migration?
- You will live to regret your previous workarounds. Vow to forsake these in the future.
- Consider how you need to sort and what you need to report when making mapping decisions.
- Prioritize preserving the ability to pay invoices and maintain access when scheduling cleanup projects.
- Understand your options as best you can. Ask the vendor to fix mistakes created by your imperfect understanding.
- Decide what is "mission critical" when going live and focus your effort there. You will not be able to implement every improvement immediately. You will not be able to fulfill every request for reports and data immediately, and everyone should understand that up front.

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