2016 GIL Users Group Meeting
Shaping The Future Together
Agenda

Welcome  (9:30am – 9:40am)

Alma Implementation Overview  (9:40am – 11:30am)

Break  (11:30am – 11:45am)

Session One  (11:45am – 12:30pm)

Lunch  (12:30pm – 1:25pm)

Session Two  (1:25pm – 2:10pm)

Session Three  (2:20pm – 3:00pm)
Welcome Attendees
Welcome Lucy Harrison
Registration Challenges
Logistics
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Alma & Primo (OPAC) Implementation Project Overview

Presented by: Mark Flynn, Dean of Libraries, Columbus State University, RACL Vice Chair and Chair Elect
Regents Academic Committee on Libraries (RACL) Guiding Principles
http://gil.usg.edu/alma/implementation_information/racl-guiding-principles

- Collaboration
- Manage electronic, digital, and print materials in same interface and workflow
- Rethink workflows to gain efficiencies
- Look beyond the individual library for efficiencies
- Facilitate/enhance resource sharing across GIL
- Facilitate Integration with other campus and USG
- Change needs to be transformative
- Focus on Best Practices, Library Standards, and Ongoing Staff Development

Presented by: Mark Flynn, Dean of Libraries, Columbus State University, RACL Vice Chair and Chair Elect
Agenda

- Project Overview
- Project Teams
- Vanguard Update/Panel
- Institutional Phase
- Training Opportunities

- Data Cleanup
- Data Migration
- Alma Configuration
- Primo (OPAC)
- Project Information

Presented by: Barry Robinson, Project Director
Project Overview

Project Scope

http://gil.usg.edu/alma/implementation_information/frequently-asked-questions

- Implement Alma → Decommission Voyager
- Implement Primo (OPAC) → Decommission GIL Find/Classic
- Maintain use of EDS as Discovery Interface
- Implement Alma Link Resolver → Decommission SFX
- Establish Shared Catalog
- Establish External Authentication

Presented by: William Clayton, GIL/GALILEO
Project Overview

Project Website (External)
http://gil.usg.edu/alma

- June 2015: Contracted with Ex Libris
- July 2015 - September 2015: Formed project implementation teams
- October 2015: Project Director onboarded, Ex Libris onsite for planning
- December 2015: Georgia Tech went into production with Alma

November 2015 – August 2016: Vanguard Testing Phase (3 testing institutions) in process
May 2016: Official Project Kickoff for all Institutions (TODAY!)
Late January 2017 – Alma Functional Workshop for All Institutions
February 2017– April 2017: Institutional Training
May 2017: Production Cut-Over for all Institutions

Presented By: Barry Robinson and Adriana Pilecky-Dekajo
Project Teams

Implementation Team

Next Generation Library Project Director – Barry Robinson
Executive Director, Library Services, USG – Lucy Harrison, June
Deputy University Librarian & Director of Library Technology, UGA – Jason Battles
GALILEO Support Services – Lauren Fancher, Ken Henslee
GALILEO Interconnected Libraries – William Clayton, Bob Trotter, and Sean Purcell
Acquisitions Team Lead – Dana Walker, Kat Hart
Assessment Team Lead – Sonya Gaither
Cataloging Team Lead – Adam Kubik
Fulfillment Team Lead – Viki Timian
OPAC Team Lead - Amy Burger
Chair, GIL Coordinating Committee - Mark Flynn

Presented By: Barry Robinson
Best Practices Teams

GIL Express – *Mary Poland*, University of Georgia
Cataloging – *Guy Frost*, Valdosta State University

Presented By: *Barry Robinson*
Project Teams

Acquisitions/Serials/ERM Implementation Team

Team Leads: Dana Walker, University of Georgia; Kat Hart, Georgia State University

Benjamin Davis, Georgia College & State University
Paolo Gujilde, Georgia Southern University
Tina Holloway, Georgia State University Law
Melissa Johnson, Georgia Regents University
Agnes Muriuki, Fort Valley State University
Olga Russo, Kennesaw State University
Charlie Sicignano, University of West Georgia
Ken Smith, Valdosta State University
Jacqueline Vickers, South Georgia State College
Elizabeth Winter, Georgia Institute of Technology
Jim Garner, GIL Support Resource
Lauren Fancher/Ken Henslee, GALILEO Support Resources

Presented By: Barry Robinson
Assessment (Reports, BI, Analytics) Implementation Team

Team Lead: Sonya Gaither, Gordon State College

Rod Bustos, Georgia Regents University
Jay Forrest, Georgia Institute of Technology
Debbie Holmes, College of Coastal Georgia
Michael Holt, Valdosta State University
Marty Tanner Hughes, University of Georgia
Jennifer Jones, Georgia State University
Jeff Mortimore, Georgia Southern University
Vicki Parsons, Georgia Gwinnett College
Deborah Prosser, University of North Georgia
Robert Quarles, Atlanta Metropolitan State College
Cynthia Ragin, GIL Support Resource
Ken Henslee, GALILEO Support Services

Presented By: Barry Robinson
Project Teams

Cataloging and Metadata Implementation Team

Team Lead: *Adam Kubik*, Clayton State University

*Sandra Bandy*, Georgia Regents University
*Kayla Barrett*, Georgia Archives
*Qian Cui*, Georgia State University Law
*Matt Frizzell*, Georgia Institute of Technology
*Guy Frost*, Valdosta State University
*Kelly Holt*, University of Georgia
*Neil Hughes*, University of Georgia
*Jenifer Marquardt*, University of Georgia
*Deborah Skinner*, Georgia Southern University
*Britni Williams*, Albany State University
*Susan Wynne*, Georgia State University
*Sean Purcell*, GIL Support Resource

Presented By: Barry Robinson
Fulfillment (Circ, ILL, UB +) Implementation Team

Team Lead: Viki Timian, University of Georgia

Sherrida Crawford, Valdosta State University
Cynthia Fears, Columbus State University
Karen Glover, Georgia Institute of Technology
Denita Hampton, Georgia State University
Amanda McKenzie, East Georgia State College
Caryl Nemajovsk, Darton State College
Fred Smith, Georgia Southern University
Susan Vines, Georgia Highlands College
Wendy Wilmoth, Georgia Piedmont Technical College
Bob Trotter, GIL Support Resource

Presented By: Barry Robinson
Project Teams

GIL OPAC Committee

Team Lead: Amy Burger, Dalton State College
Betty Rogers, Fort Valley State University
Katie Shepard, East Georgia State College
Jennifer Young, Kennesaw State University
Lee Ann Cline, Dalton State College
Judy Ellis, Middle Georgia State College
Judith Garrison, Armstrong State University
Jeffrey Mortimore, Georgia Southern University
Kristin Nielsen, University of Georgia
Scott Piepenburg, Valdosta State University
James Scott, Fort Valley State University
John Wilson, Georgia Southwestern State University
Susan Wynne, Georgia State University
Lauren Fancher, GALILEO Support Services

Presented By: Barry Robinson
Project Teams

Ex Libris Project Team

Adriana Pilecky-Dekajlo, Project Manager
Chen Markfeld, Alma Implementation Consultant
Megan Drake, Alma Implementation Consultant
Russell Thompson, Primo Implementation Consultant
James Tapia/Dave Sellers, Infrastructure Consultants

Ex Libris Professional Services Management Team

Melissa Hilbert, VP of Professional Services
Adriana Pilecky-Dekajlo, Director of Project Management
Marina Spivakov, Director of Implementation Services
Leah Bokar, Implementation Manager
Maria Bunevski, Implementation Manager
Wei Dai, Technical & Developmental Services Manager
Connie Braun, Training Services Manager
John Larson, Consulting Services Manager

Presented by: Adriana Pilecky-Dekajlo, Ex Libris Project Director
Vanguard Phase

January 2016
February 2016
March 2016
April 2016
May 2016
June 2016

Training (Basic Alma, Migration, Configuration, Testing, Analytics, Primo OPAC)
Mix of Online Recording, Live Webinar, Documentation

Data Migration/P2E/Link Resolver Planning
Alma Configuration Planning
Alma Test Scenario Planning
Alma Testing
Primo OPAC Training, Configuration & Testing
Vanguard – Imp Team 1st Report to Guide next phase

Alma Pre-Prod
Primo Pre-Prod

Voyager Data Cleanup
Ext Auth, SIS Testing, INTs, EDS, Assessment, Accessibility etc.
Ex Libris Onsite for Workflow review

Presented by: Jason Battles, Deputy University Librarian, University of Georgia
Georgia Southern University
(Leads: David Lowder, Debra Skinner)

University of Georgia
(Leads: Marty Tanner-Hughes, Viki Timian, Dana Walker)

Valdosta State University
(Leads: Sherrida Crawford, Ken Smith)

Panel Moderator: Barry Robinson
45 minutes
Institutional Phase

May 26, 2017 Go-live

- Alma Certification
- Implement Primo and Alma authentication
- Implement third-party integrations
- Alma data checking and workflow review
- Staff Training, Marketing Primo
- Primo Functional calls
- Alma Functional calls

Project Teams: weekly calls, project planning, regular status updates

19 May, 2016
Project Kickoff

Oct 17, 2016
Test Loads Released

Nov 2016
First look at Primo

Jan-17 - Apr-17
Go-Live Readiness checks

Jan 17
Alma Functional Workshop (2)

Apr 17
Cutover & Go-Live

1 May 2017 - 26 May 2017

Jul 17
Move to Support

Jul 2017

Jun 2016
Alma Functional Workshop (1)

15 Sep, 2016
Test Load Start

May 2016

[Graph showing timeline and project milestones]
Training Opportunities

Presented By: Barry Robinson and Adriana Pilecky-Dekajlo
Voyager Data Cleanup

Resources
• Vanguard Findings
• Data Cleanup Tasks/Queries Spreadsheet
• WebEx Q&A sessions (July – August)
• Q&A Documentation

Deadline
August 19th, 2016 for full test load

Presented by: Sean Purcell
Deliverables
• Voyager to Alma Migration Form
• Voyager Data Extract
• SFX Data Extract or Non-EXL Link Resolver Form
• P2E File

Resources
• Vanguard Findings
• Trainings
• WebEx Q&A sessions

Deadline
August 19th, 2016 for full test load
Alma Configuration

Deliverables
• Alma Configuration Form
• External Authentication Form

Resources
• Vanguard Findings
• Trainings
• WebEx Q&A sessions

Deadline
September 27th, 2016
Highlights/Goals

- GIL OPAC Committee to design shared interface across all institutions
- Portal to GIL Express
- Primo (OPAC) available in late November 2016
Where do you go to find project information

1. Your institutional leads!
2. External Project Website – http://gil.usg.edu/alma
3. GIL Community Project Documentation Wiki – http://goto.gil.usg.edu/gilalma
   (this site is currently for institutional leads)
4. Project Director, Barry Robinson (bkr@uga.edu)
Wrap Up

Next Steps (near term):

**May 19-20**\(^{th}\) – Institutional Leads Technical Kickoff (Medium Project Info)
3:30pm, Teacher Education Building, Room 389

June – Institutional Leads Take Alma Certification Course

June 14-16\(^{th}\) – Vanguards meet with Ex Libris for workflow workshop

June 30\(^{th}\) – Vanguards/Imp Team document data cleanup/migration findings

Mid July – Start of Bi-Weekly Institutional Lead Work Sessions (Detailed Project Info)

Mid August – Data Cleanup/Migration Forms Due

Mid August – Vanguards/Imp Team document configuration findings

Late September – Configuration forms due

Mid October – Alma Institutional Test Environment Available

Late November – Primo (OPAC) Institutional Test Environment Available

Presented By: Barry Robinson and Adriana Pilecky-Dekajlo
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