



Ex Libris Alma Rapid Implementation Methodology

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Introduction

This document provides an overview of the typical Ex Libris Alma implementation processes and tasks to help customers prepare for an Ex Libris Alma implementation project.

Ex Libris Implementation Strategy

The Ex Libris teams strive for 100% customer satisfaction. We assign a project manager to guide the customer from the beginning of the project to its completion, and collaborate with the library to create a mutually agreed upon plan for the project scope, roles, and timeline during the initial phase of implementation (within the timeline defined in the contract).

We take a service-oriented approach, whereby Ex Libris performs the initial configuration, data migration, and other implementation tasks, based on the customer's input and local expertise. The input is gathered using streamlined workbooks and is focused on the information required at various points throughout a project. Training is generally Web-based and takes place throughout the project, as required.

Ex Libris staff can apply the knowledge they have gained and best practices they have developed through hundreds of projects to perform the majority of the initial technical work for the library. Rather than focusing on one-time technical tasks, library staff can focus on the intellectual aspects of their work that demonstrate the value they bring to their organizations and users.

Implementation Project Lifecycle

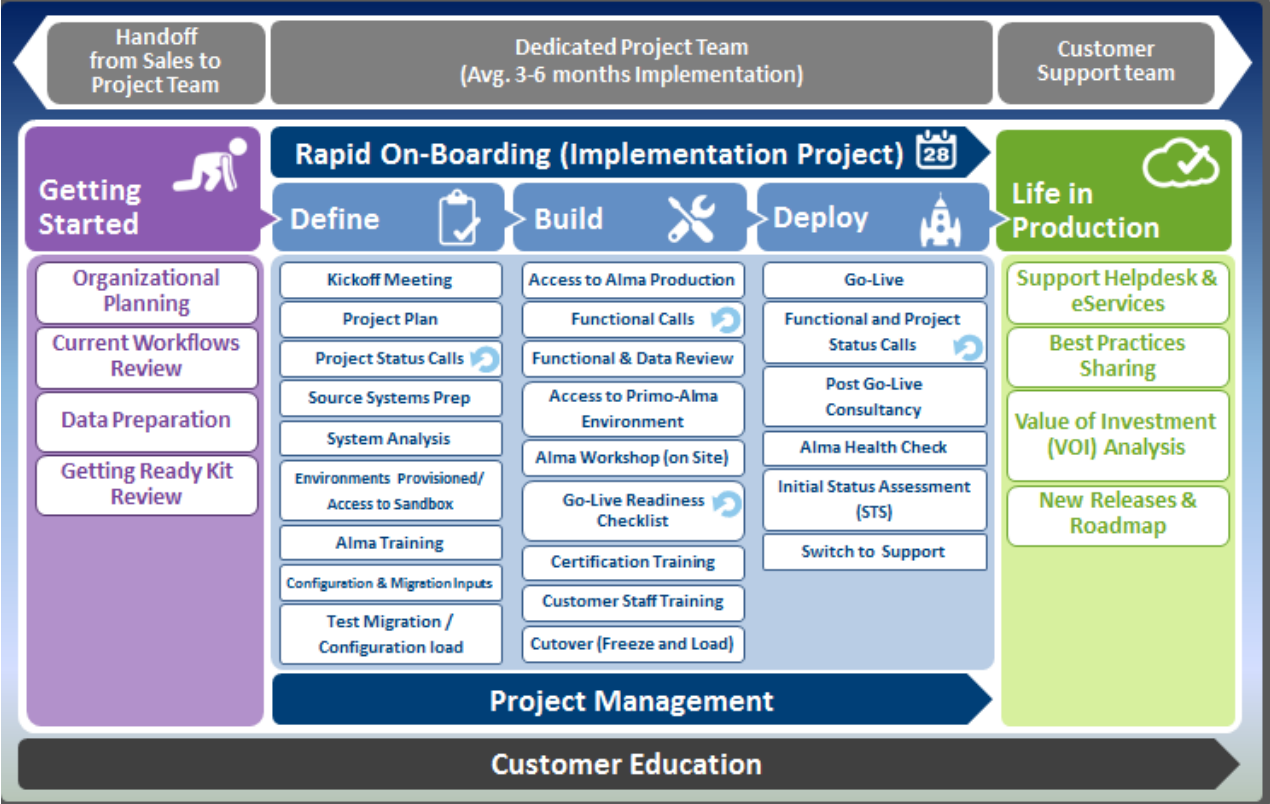
The Ex Libris implementation strategy leverages the extensive implementation experience, as well as the library science and technical knowledge of our staff, to bring Ex Libris solutions into production efficiently and effectively.

The timeframe for Alma implementation can range from three months for a small, standard implementation to six months for a large, complex institution. Implementation for consortia is scheduled based on the chosen implementation model (that is, a decision about cohorts). Implementation of Ex Libris Alma also requires integration with a discovery solution. If the customer uses Ex Libris Primo for discovery, the implementation project also includes integration with Primo.

The project duration is defined in the contract. A high-level project plan indicating the major milestones is prepared and agreed upon by both sides. This plan serves as a commitment for the customer and Ex Libris to allocate the relevant resources, complete assigned tasks, and meet agreed upon deadlines for the implementation of Alma.

Rapid Implementation Methodology

The rapid implementation methodology is a framework of phases, tasks, and milestone dates based on best practices and years of Ex Libris Professional Services experience. The methodology enables repeatability and as well as the management of expectations, which are critical to the success of Alma implementation.



Getting Started: Preparing for the Implementation Project

Upon signing a contract with Ex Libris, customers receive a welcome letter that includes a product “Getting Ready” kit. This kit contains a series of guides, recorded sessions, and getting started documents to help both library and technical (IT) staff prepare for Alma implementation.

In parallel, Ex Libris performs an internal statement of work and sales transition review to ensure that the implementation project team fully understands the customer’s goals, requirements, and implementation scope.

During this period, both the customer and Ex Libris should identify project stakeholders and define project teams (organization planning). It is recommended that the customer use this time for an internal review of the existing workflows and data.

Shortly thereafter, the Ex Libris implementation project manager coordinates with the customer lead to schedule the project kickoff and formally begin the project.

Rapid On-Boarding (Implementation Project) – A Phased Approach

Ex Libris Professional Services follows an implementation approach that pairs an Ex Libris project team with a customer project team. The three key phases of implementation – Define, Build, and Deploy – are detailed below.

Project status meetings take place throughout all phases of the implementation project to help ensure progress and accuracy.

Project status calls are usually conducted between the Ex Libris project manager and the customer team project coordinator. Other project team members may participate in such calls as required.

Phase 1: Define

The Define phase starts with the **kickoff meeting**. A designated Ex Libris project manager (PM) partners with the customer project coordinator from the outset to define a detailed project plan and agree on major milestones.

At the kickoff meeting, the Ex Libris and the customer project team review all project stages, roles, and responsibilities and agree to a project plan that identifies how and when Ex Libris products are to be implemented. The PM and customer project team agree on a mutually satisfactory **project plan** and Alma Go-Live date.

A **System Analysis session** will be scheduled toward the beginning of the Define phase to discuss the general setup and integration requirements, and introduce the configuration and migration handbooks to the customer. This session, along with the "Administration Fundamentals" recorded training sessions, will help the customer provide initial input for configuration and migration settings.

During the Define phase, Ex Libris performs customer **environment provisioning** on both sandbox (testing) and production environments, and provides the customer access to the Alma Standard sandbox that includes Ex Libris standard data and configuration. At this stage, we require the customer project team to proceed with "**Alma Training**," which includes a series of recorded sessions. These training sessions provide the customer project team with an introduction to Alma concepts as well as the background for understanding the main Alma workflows. These sessions also assist the project team in defining requirements and becoming familiar with Alma in the sandbox environment. As mentioned above, the "**Alma Training**" also includes "**Administration Fundamentals**" training, short recordings that provide the background for Alma configuration and support informed implementation decisions for Alma workflows. Following completion of this training module, the customer will be granted access to configuration on the sandbox environment.

Toward the beginning of the Define phase, the customer must proceed with extracting, validating, and delivering the data from source systems for migration to Alma using the defined formats, tools, and procedures provided by Ex Libris.

During this period, the Ex Libris project team works on configuring the customer production environment. The production environment is configured with Day 1 required configuration, based on the customer configuration input collected during the Define phase. Customer data from source systems is migrated.

The Define phase is completed with the production environment being configured based on customer input and a test load of the migrated data.

Phase 2: Build

The Build phase starts by providing the customer access to Alma **on a production environment**.

At this stage, the production environment, which contains Day 1 configuration and data, is delivered for **customer functionality review and data testing**. The customer performs data tests and workflow reviews.

In addition, at this stage, the **Alma environment is integrated with the Primo** discovery and delivery interface. Primo is released for the review and feedback of the customer's core project team. It is recommended that the core team involve public services staff to enlist their review and feedback.

Functional calls take place between the Ex Libris project team implementation consultant and customer functional experts. It is recommended that the customer team project manager participate in these functional calls as well.

During this period, the customer project team, together with the Ex Libris project team, review and define a list of third-party integrations that are required to be in place for Alma Go-Live. The customer then proceeds with the setup of these integrations later on in the Build phase of the project, using the Ex Libris project team guidelines as required.

The above is a consultative process that includes **functional calls** with the project team and the functional onsite workshop. During these events, the customer works on the Alma production environment and Primo environment with institution-specific migrated data and configuration. During the functional workshop, the Ex Libris project team works onsite with the customer project team and verifies that Alma is configured and functions in line with customer workflows.

One month before the Go-Live date, the customer will be enrolled in the **certification training course**, with the goal of taking over the administration of Alma. Ex Libris requires each institution to have two staff members certified. These staff members can then submit Support cases relating to configuration issues following Go-Live. Once the customer is live with Alma and certified, Ex Libris will grant access to Alma configuration on the production environment and the customer will be able to perform configuration fine-tuning as required by the institution.

Any identified migration or configuration modifications are documented and applied to the cutover data load.

During this phase, the customer is also expected to prepare and perform internal **staff training**. The Build phase is completed with the customer “freeze” of the source systems. Ex Libris then performs a **cutover data load**.

Phase 3: Deploy

Day 1 of the Deploy phase is the customer **Go-Live date** on the production environment.

Throughout the Deploy phase (2 months), the Ex Libris project team is available to address any issues and support the customer staff through their first steps with Alma in production. During this period, functional and project status calls between the customer and Ex Libris project teams will continue.

Upon conclusion of the Deploy phase, the customer is formally transitioned to the Ex Libris Customer Support team for ongoing support. The implementation project is considered complete upon the conclusion of the Deploy phase.

Life in Production: After the Implementation Project

A customer’s relationship with Ex Libris does not end with the Go-Live of Alma. Rather, Ex Libris is committed to ensuring that a customer’s needs continue to be met.

Our dedicated Ex Libris Support team is available to assist customers with any product-related issues that they cannot resolve on their own. This includes robust self-service online help tools as well as direct interactive assistance via the CRM for logging and receiving updates on cases submitted. The CRM can be accessed from the Ex Libris customer portal.

Customer Education

Training is provided throughout the entire implementation lifecycle and beyond as an integrative part of the project lifecycle. Ex Libris provides training to the core customer project team as discussed above, in all three phases of the implementation project. Additionally, on-demand recorded sessions are available throughout all phases of the implementation project and post Go-Live via the Ex Libris Learning Center, the Ex Libris online training management system. A significant part of the training can be done at the customer's own pace. Training is reinforced with tutorials, comprehensive user guides, and context-sensitive online help. For detailed information on the training courses offered, refer to the [Ex Libris Alma Education Catalog](#).

Each Alma release includes videos of the release highlights and customers are invited to the Alma “**Ask the Expert**” sessions that allow customers to ask questions about using the Alma system and incorporating best practices. Customers are also allowed to register new staff members for the monthly Certification program courses if a new system administrator has joined the library staff.

Implementation Project Details

Below are additional details of the Ex Libris implementation project.

General Project Activities

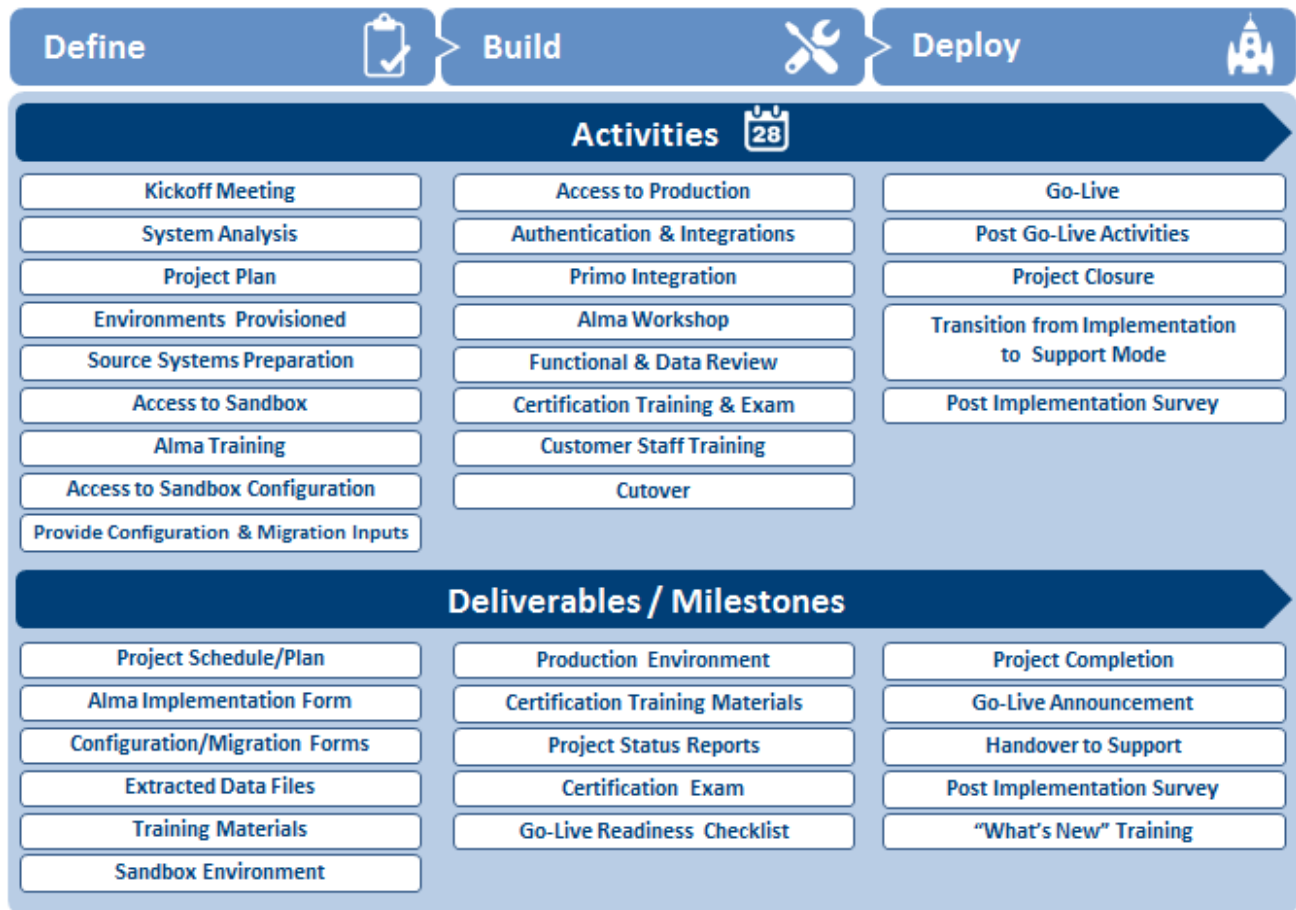
Listed below are typical project activities to help a customer plan and prepare for their Ex Libris project.

Phase	Milestone/Task	Customer	Ex Libris
Define	Kickoff meeting	✓	✓
	Project scope, schedule, and communication plan reviewed and agreed upon	✓	✓
	System analysis	✓	✓
	Environments provisioned		✓
	Access to sandbox provided	✓	✓
	Alma training	✓	
	Access to sandbox configuration provided	✓	✓
	Configuration and migration input provided	✓	
	Relevant source systems (ILS, digital repositories, ERM, link resolver, other integration points) prepared	✓	
	Configuration form finalized	✓	
Build	Alma configuration and data migration		✓
	Access to Alma production delivered		✓
	Authentication and integrations configured	✓	
	Primo integration delivered		✓
	Alma workshop	✓	✓
	Functional + data review and feedback	✓	
	Customer staff training	✓	
	Alma Certification program – training and exam	✓	✓
Cutover period	✓	✓	
Deploy	Go-Live	✓	
	Project closure and handoff	✓	✓
	Post-implementation survey	✓	
	Transition from implementation to support mode	✓	✓

- **Kickoff meeting** – This is the meeting in which the Ex Libris project manager meets with the customer project team to determine requirements, contact people, a communication plan, and expectations regarding project deliverables.
- **Alma training** – By training the customer project team early on in the Define phase, Ex Libris ensures that the customer project team will be ready to review the production environment once it is released for testing, following configuration and data load.
- **Source system preparations:**
 - Customers migrating to Alma from Ex Libris systems must prepare their source systems and data for migration as detailed in the *Getting Ready for Alma Implementation* document.
 - Customers migrating to Alma from non-Ex Libris systems must extract, validate, and provide cleansed data from legacy systems using formats defined by Ex Libris. Data must be translated from the legacy data format to the formats required for upload to Ex Libris Alma.
- **Provision and configure system** – Ex Libris provisions the system and configures core workflows based on customer requirements provided during the Define phase.
- **Alma workshop** – During the Alma workshop, the Ex Libris Implementation consultant works onsite with the customer project team to ensure that the configuration of Alma meets the customer's needs, consulting with the customer on functionality/workflow issues.
- **Certification training** – Ex Libris' goal is to provide an extensive knowledge transfer to the customer that will allow the customer to fully administer and configure the Alma system on an ongoing basis, post Go-Live. After Go-Live and certification training, the customer is ready to assume responsibility for configuration tasks and perform any required adjustments and fine-tuning.
- **Project management activities** – This activity spans the duration of the project. Ex Libris Professional Services provides the customer project team with regular project status information, reports, issues and action items, and issue resolution details.

Key Project Deliverables and Milestones

The following are critical milestones during the project lifecycle.



- Project start and Go-Live date agreement** – Mutually agreeable dates to begin the implementation project and a Go-Live date for Alma. The first version of the detailed project plan is created by the Ex Libris PM based on these dates. Customer sign-off is acknowledgement that these dates are acceptable and the customer will complete project plan tasks as scheduled.
- Detailed project plan** – To be created by the Ex Libris project manager at the beginning of the project, reviewed during the kickoff meeting, and refined upon the conclusion of the Define phase.
- Alma implementation form** – During the Define phase of the project, the customer is required to fill out a form that summarizes all required inputs for Alma implementation.
- Source data files (non-Ex Libris systems)** – The customer is responsible for data extract from source systems, to be provided in the Ex Libris documented format. These files are processed and uploaded to Alma by Ex Libris.

Estimated Project Duration

The project timeline is dependent on the following factors and ranges from three months for a small, standard library to six months for a large, complex institution:

- Size of customer's collection
- Implementation scope (Physical, Electronic, Digital workflows)
- Source systems migrated to Alma
- Data migration scope
- Discovery interface
- Consortia implementation

Ex Libris and Customer Project Team & Responsibilities

The project team is to be composed of Ex Libris and customer staff resources, who will address the implementation of Alma. Based on the project scope and approach outlined above, an overview of the project resources from each organization are summarized below.

Ex Libris

- **Role:**
 - Get customer successfully up and running with Alma
 - Coordinate all activities related to Alma implementation and perform all activities that are under Ex Libris' responsibility as detailed in the project plan (for example, data migration, configuration, training, implementation support, documentation, and so forth)

Project Roles	Responsibilities
Project Manager	<ul style="list-style-type: none">▪ Maintain overall project plan, including schedule, scope management, risks, and issues.▪ Monitor and report on project status and identify/manage issues.▪ Coordinate involvement of Ex Libris resources.▪ Communicate as outlined in the communications plan
Implementation Consultant	<ul style="list-style-type: none">▪ Analyze requirements and map to configuration and functionality▪ Perform the configuration activities▪ Deliver consulting services and implementation assistance as required to meet all project deliverables
Data Migration Consultant	Perform data migration from customer source products to Alma

Project Roles	Responsibilities
Training Consultant	Deliver training services

Customer

- **Role:**
 - Implement Alma within the agreed upon timeframe, according to the agreed upon scope.
 - Manage the internal customer project team and in the case of consortia, the participating institutions

Project Roles	Responsibilities
Project Lead	<ul style="list-style-type: none"> ▪ Manage involvement of customer project team resources ▪ Work with the Ex Libris project manager on work planning/deadline management ▪ Work with Ex Libris to monitor progress and track status ▪ Drive issue resolution and escalation as appropriate at customer site. ▪ Status reporting to customer management and team members at customer site
Functional Expert	<ul style="list-style-type: none"> ▪ Provide expert input into all areas of business processes. This is likely to include: Acquisitions, Resource Management, Fulfillment, data in all listed areas, Public Services ▪ Facilitate and perform functional review activities ▪ Report issues found during testing to Ex Libris via CRM ▪ Provide team updates on testing progress ▪ Actively participate in training, functional meetings, and workshop
Training	<ul style="list-style-type: none"> ▪ Deliver training to internal customer library staff ▪ Develop, modify, or re-use training materials provided by Ex Libris as needed ▪ Actively participate in training, functional meetings, and workshop delivered by Ex Libris

Project Roles	Responsibilities
Data Integration/ Authentication/ Technology Team Lead and Supporting Resources	<ul style="list-style-type: none"> ▪ Provide information/technical expertise regarding customer's existing systems and environments, and help develop/validate overall technical solution architecture ▪ Monitor/assist/support the development/deployment of customer single sign-on solution ▪ Ensure necessary customer technology resources are involved as needed to support project activities ▪ Support testing and debugging activities ▪ Coordinate technology touch points and processes on a day-to-day basis
Administrator	<ul style="list-style-type: none"> ▪ Become proficient in Alma and Primo configuration (attend Alma certification training post-implementation) ▪ Open Ex Libris Support cases as needed ▪ Handle day-to-day technology requests after launch

High-Level Sample Project Plan

Phase		Activity	Months				
			1	2	3	4	5
Implementation	Define	Kickoff meeting	█				
		System analysis	█				
		Forms provided	█				
		Provisioning of environments	█				
		Access to sandbox	◆				
		Alma training	█	█			
		Data and source system preparation	█	█			
		Input about migration and configuration	█	█			
		Finalize configuration form		█			
		Data migration test load		█	█		
	Configuration load		█	█			
	Deploy	Access to production system			◆		
		Primo integration			█		
		Authentication and integrations			█	█	
		Functional, configuration, and data review			█	█	
		Alma workshop			█		
		Adaptions and corrections				█	
		Certification Training				█	
		Library staff training				█	█
	Cut over including production load				█	█	
Deploy	Go-Live					◆	
	Project wrap up and closure					█	
	Post Go-Live consultancy					█	
	Post-implementation survey					█	
	Transition into regular operation and support					█	

Implementation Best Practices

Based on numerous Ex Libris implementations at a variety of customers/libraries, we have identified the following best practices:

- Staffing
 - Assemble your team and assign roles at the start of the project so that they can gain as much experience and knowledge from the implementation as possible.
 - Attend training at the start of the implementation to familiarize yourself with the Alma service and available configuration options. Prior to Go-Live, make sure to refresh your knowledge.
 - Practice using your Alma knowledge in a sandbox environment both during and after the implementation to understand how configuration changes and new features can support your business processes.

- Develop a project timeline with realistic time commitments, and then hold the team accountable for meeting the established project timeline.
- Build internal expertise in Alma to support increased adoption and consistency across the organization.
- Data
 - Clean up your data prior to uploading it to Alma.
 - Familiarize yourself with the data formats Ex Libris requires in order to migrate data from your source system. You will receive these as part of your welcome kit.
 - Review the data included in the export prior to providing it to Ex Libris.
- Execution
 - Ensure influential executive sponsorship and visibility of the initiative.
 - Ensure involvement of technical (IT) staff in the project.
 - Ensure involvement of public services-facing staff in the project.
 - Prioritize the Alma implementation so that other initiatives do not create project delays.
 - Monitor project progress and scope changes.
 - Promote and encourage adoption.
 - Establish project objectives and assess achievement at the conclusion of the project.