



**PROCESO DE IMPLEMENTACIÓN
DE ALMA EN LA UNIVERSIDAD
ALFONSO X EL SABIO**

PROCESO DE IMPLEMENTACIÓN DE ALMA EN LA UNIVERSIDAD ALFONSO X EL SABIO. *PUNTOS FUERTES Y PUNTOS DÉBILES*

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UNIVERSIDAD
ALFONSO X EL SABIO

Presentación

Quienes somos:

- Universidad Privada
- Una única biblioteca Central
- Empleados (4 bibliotecarios y 2 auxiliares)
- Comunidad Universitaria pequeña (10.000)
- Fondos:
 - e-books 1.000
 - Journals 5.000
 - Ejemplares 82.000



UNIVERSIDAD
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Proyecto implementación Alma

- Decisión de Paso de Aleph a Alma: ventajas respecto a Aleph e integración de las tres elementos (SIGB, SFX y Discovery) en una sola herramienta
- Fechas del proyecto: Septiembre de 2016 - 1 de Marzo de 2107



Puntos Fuertes del Proceso

- Rigurosa planificación - Calendario de trabajo exigente
- Cumplimiento de las fechas marcadas
- Claridad de ideas -Tareas y tiempos repartidos
- Apoyo en la resolución de problemas, dudas y seguimiento del proyecto



CALENDARIO


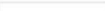

















EJEMPLO DE CALENDARIO DE PLANIFICACIÓN DE EX-LIBRIS

ID	Task Name	Start	Finish	Duration	Resource Names	TaskStatus	% Complete	3rd Quarter	
								Jul	Aug
0	Universidad Alfonso X el Sabio - Alma Implementati	Mon 15/08...	Fri 24/03/17	160.5 days?			90%		
1	Getting Ready	Mon 15/08/16	Mon 12/09/16	21 days?			0%		
2	Ex Libris Preparations	Mon 15/08/16	Thu 18/08/16	3.63 days			0%		
28	Customer Preparations	Mon 15/08/16	Mon 12/09/16	21 days?			0%		
38	Alma Implementation	Wed 21/09/16	Fri 24/03/17	133.5 days?			98%		
39	Phase I - Define	Wed 21/09/16	Thu 09/02/17	103 days?			100%		
40	Kick off meeting (Webex) + Introduction of Migration form (Webex)	Wed 21/09/16	Wed 21/09/16	0.5 days Customer,ExL		✓	100%		
41	Configuration form introduction and Migration form review (onsite)	Thu 06/10/16	Thu 06/10/16	1 day Customer,ExL		✓	100%		
42	Standard sandbox provisioned	Thu 06/10/16	Thu 06/10/16	0 days ExL		✓	100%		
43	Access to the Alma Standard Training Sandbox granted	Thu 06/10/16	Thu 06/10/16	0 days ExL		✓	100%		
44	Alma Training	Fri 23/09/16	Thu 09/02/17	100.5 days?			100%		
45	Training "Navigation and searching in Alma"	Fri 23/09/16	Mon 26/09/16	1 day Customer		✓	100%		
46	Provide questions for follow-up call	Wed 28/09/16	Thu 29/09/16	1 day Customer		✓	100%		
47	Follow-up functional call - Topic: "Navigation and searching in Alma"	Mon 03/10/16	Mon 03/10/16	1 hr Customer,ExL		✓	100%		
48	Training "User Management"	Wed 05/10/16	Thu 06/10/16	1 day Customer		✓	100%		
49	Provide questions for follow-up call	Tue 11/10/16	Tue 11/10/16	0.5 days Customer		✓	100%		
50	Follow-up functional call - Topic: "User Management"	Mon 17/10/16	Mon 17/10/16	1 hr Customer,ExL		✓	100%		
51	Administration Fundamentals > Introduction	Tue 18/10/16	Wed 19/10/16	1 day Customer		✓	100%		
52	Administration Fundamentals > User Managem	Wed 19/10/16	Thu 20/10/16	1 day Customer		✓	100%		

Project: Universidad Alfonso X el S Date: Fri 10/03/17	Task		Inactive Task		Start-only	
	Split		Inactive Milestone		Finish-only	
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	External Tasks		Manual Summary Rollup			
External Milestone		Manual Summary				




















ID	Task Name	Start	Finish	Duration	Resource Names	TaskStatus	% Complete	3rd Quarter	
								Jul	Aug
53	Training "Fulfillment"	Thu 20/10/16	Wed 26/10/16	4 days	Customer	✓	100%		
54	Provide questions for follow-up call	Thu 27/10/16	Thu 27/10/16	0.5 days		✓	100%		
55	Follow-up functional call - Topic: "Fulfillment"	Fri 04/11/16	Fri 04/11/16	1 hr	Customer,ExL	✓	100%		
56	Administration Fundamentals > Fulfillment	Mon 07/11/16	Tue 08/11/16	2 days	Customer	✓	100%		
57	Open access to Sandbox configuration	Tue 08/11/16	Tue 08/11/16	0 days	ExL	✓	100%		
58	Training "Resource Management"	Wed 09/11/16	Mon 14/11/16	4 days	Customer	✓	100%		
59	Provide questions for follow-up call	Tue 15/11/16	Tue 15/11/16	0.5 days		✓	100%		
60	Follow-up functional call - Topic: "Resource Management"	Wed 16/11/16	Wed 16/11/16	1 hr		✓	100%		
61	Training "Acquisitions"	Wed 16/11/16	Tue 22/11/16	4 days	Customer	✓	100%		
62	Provide questions for follow-up call	Mon 28/11/16	Tue 29/11/16	0.5 days		✓	100%		
63	Follow-up functional call - Topic: "Acquisitions"	Wed 30/11/16	Wed 30/11/16	1 hr	Customer,ExL	✓	100%		
64	Administration Fundamentals > Resource Management	Wed 30/11/16	Thu 01/12/16	1 day	Customer	✓	100%		
65	Administration Fundamentals > Acquisitions"	Thu 01/12/16	Fri 02/12/16	1 day	Customer	✓	100%		
66	Alma Functional Training and Administration Fundamentals training completed	Fri 02/12/16	Fri 02/12/16	0 days		✓	100%		
67	Alma Certification Training Program	Wed 21/12/16	Thu 09/02/17	37.5 days?			100%		
68	Supply Ex Libris staff names for the training	Wed 21/12/16	Wed 21/12/16	0.5 days	Customer	✓	100%		
69	Register staff for certification training progra	Fri 23/12/16	Fri 23/12/16	1 day	ExL	✓	100%		
70	Alma Certification Training	Tue 10/01/17	Wed 08/02/17	23 days	Customer,ExL	✓	100%		
71	Confirmation of Certified Staff	Thu 09/02/17	Thu 09/02/17	1 day?	ExL	✓	100%		
72	Customer Configuration and Integration Prepara	Thu 29/09/16	Mon 14/11/16	32.25 days?			100%		

Project: Universidad Alfonso X el S
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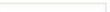

















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ID	Task Name	Start	Finish	Duration	Resource Names	TaskStatus	% Complete	3rd Quarter	
								Jul	Aug
73	Send customer Configuration Form, Sample and Guide	Thu 29/09/16	Thu 29/09/16	1 hr	ExL	✓	100%		
74	Send customer 3rd party Integrations Form	Thu 29/09/16	Thu 29/09/16	1 hr	ExL	✓	100%		
75	Return draft configuration form inputs	Thu 29/09/16	Thu 10/11/16	30 days	Customer	✓	100%		
76	Return integrations form inputs	Thu 29/09/16	Thu 10/11/16	30 days	Customer	✓	100%		
77	"Configuration Form Review" session	Thu 10/11/16	Thu 10/11/16	1 hr?	Customer, ExL	✓	100%		
78	Adjust Configuration Form inputs	Thu 10/11/16	Mon 14/11/16	2 days	ExL, Customer	✓	100%		
79	Configuration Form Finalize	Mon 14/11/16	Mon 14/11/16	0 days		✓	100%		
80	Customer Configuration and Integration Preparations Completed	Mon 14/11/16	Mon 14/11/16	0 days		✓	100%		
81	Customer Migration Test Load Preparations	Fri 23/09/16	Thu 20/10/16	19.13 days?			100%		
82	For Aleph and SFX: Download and install AutoExtract tool and create Migration Form	Fri 23/09/16	Fri 23/09/16	1 day	ExL	✓	100%		
83	Complete and Return Migration Form	Mon 26/09/16	Fri 14/10/16	15 days	Customer	✓	100%		
84	Complete and Return P2E input file	Mon 26/09/16	Fri 14/10/16	15 days	Customer	✓	100%		
85	"Migration Inputs Review" session	Mon 17/10/16	Mon 17/10/16	1 hr?	Customer, ExL	✓	100%		
86	Adjust Migration inputs, if necessary	Mon 17/10/16	Wed 19/10/16	2 days	Customer	✓	100%		
87	Customer Migration Test Load Preparations completed	Wed 19/10/16	Wed 19/10/16	0 days		✓	100%		
88	Ex Libris Migration Test Load Preparations	Wed 19/10/16	Thu 20/10/16	1 day	ExL	✓	100%		
89	Production Environment Preparation	Wed 12/10/16	Tue 24/01/17	74.5 days?			100%		
90	Data Migration - Test Load	Wed 12/10/16	Fri 18/11/16	27.38 days?			100%		
91	Aleph/SFX - Test AutoExtract/transform full data and upload to regional EXL FTP	Wed 12/10/16	Wed 12/10/16	0.5 days?	ExL	✓	100%		


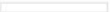

















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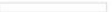













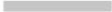



ID	Task Name	Start	Finish	Duration	Resource Names	TaskStatus	% Complete	3rd Quarter	
								Jul	Aug
92	Aleph/SFX - AutoExtract/transform full data and upload to regional EXL FTP	Wed 19/10/16	Thu 20/10/16	1 day	ExL	✓	100%		
93	Test load (full data) incl. internal testing on migration environment	Mon 07/11/16	Thu 17/11/16	9 days	ExL	✓	100%		
94	Copy institution from migration server to production environment along with migration statistics report	Fri 18/11/16	Fri 18/11/16	0.5 days	ExL	✓	100%		
95	Test Load Completed	Fri 18/11/16	Fri 18/11/16	0 days		✓	100%		
96	Alma Initial Configuration	Fri 18/11/16	Tue 24/01/17	47.13 days?			100%		
97	Alma initial configuration on PROD environment	Fri 18/11/16	Mon 21/11/16	1 day	ExL	✓	100%		
98	End to end internal testing on PROD environment	Fri 18/11/16	Mon 21/11/16	1 day	ExL	✓	100%		
99	Verify Alma Analytics creation	Mon 21/11/16	Tue 22/11/16	1 day	ExL	✓	100%		
100	Alma Initial Configuration Completed	Tue 22/11/16	Tue 22/11/16	0 days		✓	100%		
101	Perform "Production Not Live" Procedure	Tue 22/11/16	Tue 22/11/16	1 hr	ExL	✓	100%		
102	Production Environment Preparation Complete	Tue 22/11/16	Tue 22/11/16	0 days		✓	100%		
103	Check the list of source link resolver providers for new URL change post Go-Live	Tue 22/11/16	Tue 24/01/17	9 wks?	Customer	✓	100%		
104	Define Phase Completed	Tue 22/11/16	Tue 22/11/16	0 days		✓	100%		
105	Phase II - Build	Wed 28/09/16	Thu 23/02/17	107.5 days?			100%		
106	Customer access to Alma Production provided (en	Tue 22/11/16	Tue 22/11/16	0 days	ExL	✓	100%		
107	Authentication & Integrations	Thu 10/11/16	Fri 13/01/17	46.88 days			100%		
108	"Alma Integrations Form" Initial Review Sessio	Thu 10/11/16	Thu 10/11/16	0.5 days	Customer, ExL	✓	100%		

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								Jul	Aug
109	Integration Setup tracked with bi-weekly calls	Mon 05/12/16	Fri 13/01/17	1.5 mons	Customer,ExL	✓	100%		
110	<i>Integrations Setup Completed</i>	<i>Fri 13/01/17</i>	<i>Fri 13/01/17</i>	<i>0 days</i>		✓	100%		
111	Customer Functional and Data Review & Testing	Tue 22/11/16	Thu 19/01/17	42.38 days			100%		
112	Testing Migrated Data	Tue 22/11/16	Tue 20/12/16	1 mon	Customer	✓	100%		
113	Migration refinements according to feedback (to be applied in cutover load)	Mon 19/12/16	Fri 23/12/16	5 days	ExL	✓	100%		
114	Testing Alma functionality per customer workflows	Tue 22/11/16	Tue 20/12/16	1 mon	Customer	✓	100%		
115	Alma Workshop (on-site)	Wed 18/01/17	Thu 19/01/17	2 days	Customer,ExL	✓	100%		
116	Configuration adjustments	Mon 12/12/16	Fri 23/12/16	2 wks	ExL	✓	100%		
117	<i>Customer Functional and Data Review & Testing Completed</i>	<i>Fri 23/12/16</i>	<i>Fri 23/12/16</i>	<i>0 days</i>		✓	100%		
118	Primo implementation (Current)	Wed 28/09/16	Fri 23/12/16	62.13 days?			100%		
119	Primo Slot Allocation and Initial Setup	Wed 28/09/16	Tue 04/10/16	4 days?			100%		
120	Allocate and set up -Slot on New Primo Production Environment	Wed 28/09/16	Mon 03/10/16	3 days	ExL	✓	100%		
121	Allocate and set up -Slot on New Primo Sandbox Environment (if relevant)	Mon 03/10/16	Tue 04/10/16	1 day?	ExL	✓	100%		
122	Authentication / PDS	Fri 25/11/16	Fri 02/12/16	5 days			100%		
123	PDS Setup against Alma/LDAP	Fri 25/11/16	Fri 02/12/16	5 days	ExL	✓	100%		
124	Alma Data - publishing and loading	Fri 18/11/16	Fri 02/12/16	10 days			100%		
125	Publish Alma data	Fri 18/11/16	Tue 22/11/16	2 days	ExL	✓	100%		
126	Load Alma data into Primo Production	Tue 22/11/16	Thu 24/11/16	2 days	ExL	✓	100%		
127	Set u-resolver base URL in Primo and Alma	Thu 24/11/16	Tue 29/11/16	3 days	ExL	✓	100%		




















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								Jul	Aug
128	Internal testing and adjustments	Tue 29/11/16	Fri 02/12/16	3 days		✓	100%		
129	Deliver Feedback to EXL	Fri 02/12/16	Fri 23/12/16	15.13 days			100%		
130	<i>Review of Primo setup for Alma</i>	Fri 02/12/16	Fri 02/12/16	1 hr	Customer,ExL	✓	100%		
131	Check Primo and Provide Feedback	Fri 02/12/16	Fri 23/12/16	15 days	Customer	✓	100%		
132	Support During Customer Checks	Fri 02/12/16	Fri 23/12/16	15 days	ExL	✓	100%		
133	<i>Acceptance of Primo Configuration</i>	Fri 23/12/16	Fri 23/12/16	0 days	Customer	✓	100%		
134	<i>Primo Implementation Work Completed</i>	Fri 23/12/16	Fri 23/12/16	0 days		✓	100%		
135	Customer Staff Training (if required)	Mon 16/01/17	Fri 03/02/17	15 days			100%		
136	Customer Staff Training	Mon 16/01/17	Fri 03/02/17	15 days	Customer	✓	100%		
137	Cutover Preparation	Mon 09/01/17	Tue 07/02/17	22 days			100%		
138	<i>Provide Getting ready for Alma Cutover document and Alma Go-Live Readiness</i>	Mon 09/01/17	Mon 09/01/17	0 days	ExL	✓	100%		
139	Complete and return Alma Go-Live Readiness Checklist	Tue 31/01/17	Tue 31/01/17	1 day	Customer	✓	100%		
140	Prepare detailed cutover plan based on cutover template	Wed 01/02/17	Wed 01/02/17	1 day	ExL	✓	100%		
141	Distribute detailed cutover plan to customer and internally	Thu 02/02/17	Thu 02/02/17	1 day	ExL	✓	100%		
142	Adjust cutover plan based on customer and internal feedback	Tue 07/02/17	Tue 07/02/17	1 day	ExL	✓	100%		
143	<i>Cutover Plan Finalized</i>	Tue 07/02/17	Tue 07/02/17	0 days		✓	100%		
144	Cutover (Cutover steps are tracked in Project-specific Cutover Plan, not in Project	Mon 13/02/17	Thu 23/02/17	9 days	Customer,ExL	✓	100%		
145	Phase III - Deploy	Thu 23/02/17	Fri 24/03/17	20.5 days?			38%		

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146	GO LIVE (Alma and Primo)	Thu 23/02/17	Fri 24/03/17	20.5 days?			38%		
147	<i>GO LIVE (Alma and Primo)</i>	<i>Thu 23/02/17</i>	<i>Thu 23/02/17</i>	<i>0 days?</i>		✓	100%		
148	Followup with source link resolver providers and ensure they have updated with new Alma	Fri 24/02/17	Fri 24/02/17	1 day Customer		✗	0%		
149	Customer confirmation that e-mails and s/ftp server may be enabled	Mon 27/02/17	Mon 27/02/17	1 day Customer		✗	0%		
150	Enable allowed email, notifications and s/ftp server in Alma configuration	Mon 27/02/17	Mon 27/02/17	1 day ExL		✓	100%		
151	Premium Sandbox Initial Creation (if included in project scope)	Tue 28/02/17	Tue 28/02/17	1 day ExL		✓	100%		
152	Refresh of Primo Sandbox with Alma data (if included in project scope)	Wed 01/03/17	Thu 02/03/17	2 days ExL		✓	100%		
153	Complete initial post go-live Alma health-check list	Fri 10/03/17	Fri 10/03/17	1 day Customer		●	0%		
154	<i>Post Go-Live Consultancy (webex or on-site)</i>	<i>Wed 15/03/17</i>	<i>Wed 15/03/17</i>	<i>1 day Customer, ExL</i>		●	0%		
155	Complete final post go-live Alma health-check l	Thu 23/03/17	Thu 23/03/17	1 day Customer		●	0%		
156	Complete Alma / Primo Implementation Survey	Thu 16/03/17	Thu 16/03/17	1 day? Customer		●	0%		
157	Switch to Alma Support	Fri 24/03/17	Fri 24/03/17	0.5 days Customer, ExL		●	0%		
158	<i>Deploy Phase completed</i>	<i>Fri 24/03/17</i>	<i>Fri 24/03/17</i>	<i>0 days</i>		●	0%		
159	<i>Project Completed</i>	<i>Fri 24/03/17</i>	<i>Fri 24/03/17</i>	<i>0 days</i>		●	0%		

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Dificultades del Proceso

- Compleja configuración para adaptarse a ALMA
- Formación a través de videos grabados en inglés
- Flujos de trabajo de ALMA no se adaptan a nosotros
- Problemas técnicos pendientes de resolver



SALIDA A PRODUCCIÓN



UNIVERSIDAD
ALFONSO X EL SABIO

Inconvenientes/Posibles Mejoras

- Poca adaptación
- SpineOmatic
- Tareas añadidas
- Autenticación Ez-Proxy
- Acceso a ejemplares Primo



Ventajas/Puntos Fuertes

- Grandes posibilidades de Integración
- Versatilidad
- Unificación de Sistemas (SFX, Primo y Aleph a Alma)
- Interface Amigable e Intuitiva
- Mayor autonomía
- Analíticas
- Sistema Vivo
- Community Zone





**Gracias por su
atención**