

**We would've, we should've,  
but we didn't:**

**if we knew then, what we know now**

**Betsy Friesen**

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“From the errors of others,  
a wise man corrects his own.”

-- Publius Syrus

# University of Minnesota Aleph Implementation

- Contract signed with Ex Libris in April 2001
- Trainer meetings began July 2001
- Implementation meetings began Fall 2001
- 3.5 million records converted for UM-TC
- UM-TC up July 1, 2002
- Coordinate campuses STP July 14, 2003

Nothing's



perfect

# Opportunities to Err

- General
- Conversion
- Documentation
- Implementation
- Training
- Post-Switch to Production

# General Issues

- Devote as many systems staff as you can to implementation
- Purchase necessary hardware
  - Newest and as high end as possible for servers
  - Soundcards and speakers for circ
  - Larger monitors for some areas
- Choices matter
- Set a date for STP and stick to it

# Conversion: Data

- Explore multiple paths to your destination
- Utilize as big a test set as possible
- Convert only essential data (know what you can give up)
- Clean up data
- Identify post-STP clean up projects

# Conversion: Record Review

- Choose record reviewers who know the data
- Make sure reviewers can comply to demands of reviewing
- Start training earlier
- Write scripts for record reviewers to use
- Work in pairs
- Meet as a group regularly
- Review record displays from public OPAC, as well as GUI



# Documentation

- Read it all ... then read it again (web guide, How Tos, and PRBs)
- Experiment and make sure a 'solution' works
- Ask questions

# Implementation

- Implementation team
- Indexing
- Tables
- Training

# Implementation Team

- Should have a thorough understanding of all functional areas
- Assign a manager to keep members on task
- Get beyond politics for the ‘greater good’

# Indexing

- Beware what you wish for
- Watch for the ‘little things’
- Test indexing early and often
- Beware of running background index jobs after STP

# Tables

- Start early ... wait, start earlier than that
- Accept defaults when possible to be able to start testing earlier
- Develop experts in each functional area
- Understand the integration of the tables

# Training

- Appoint a training manager
- Pick people who are:
  - Interested in the system as a whole
  - Comfortable speaking to groups
- Invite your ‘volunteers’ to participate
- Prepare local documentation describing work procedures

# Post-STP Issues

- Take down old system ASAP
- Keep ear to ground & listen for rumblings
- Provide 'reinforcement' training where necessary
- Begin data clean up ASAP
- Have macro software/training in place
- Communicate progress/issues to staff

# Top 10 List of Things We Would've Done Differently

10. Review records on the web OPAC, as well as the GUI
9. Clean-up data prior to conversion
8. Appoint implementation team manager
7. Develop experts **earlier & in greater numbers** in functional areas
6. Take down old system as early as possible



# Top 10 List of Things We Would've Done Differently

5. Set a date for STP, stick to it, make it work
4. Start tables work early & understand their inter-relationships
3. Read documentation; read it again; write local procedures ASAP
2. Provide as large a test environment as possible
1. Test indexing early and often

# Communicate with staff



Be willing to be flexible



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Don't lose your sense of humor

