SUNYergy

SUNY Libraries Working Together

Ex Libris, ALEPH... *In the First Person*

by Vince Courtney

It is not only geese that migrate! Yes, it's true! The Canada geese are migrating. SUNY library systems are migrating too. And recently we've all begun to think hard about our migrations to ALEPH. Each of our journeys will be slightly different, even though we will all likely have many similar elements.

Kathleen Loomis and Vincent Courtney

I know we Fredonians are considered a bit odd by our colleagues to the east of us (and ALL SUNY colleagues are to the east of us, with the possible exception of Jamestown Community College's North Campus.) Marlene Harris, our capable Ex Libris project manager, surely emphasized that enough every time she would say "except for Fredonia" in a meeting! However, even the odd ducks at Fredonia had a migratory experience that will soon be familiar to the rest of SUNY.

What starts as a notion in your staff's minds, becomes real enough as soon as you have your "Kickoff meeting", closely followed by your "Conversion Analysis" and "System Analysis" meetings. These are fancy ways of saying that Ex Libris folk will come to you to find out HOW you have been functioning, and what kinds of expectations you bring to the ALEPH implementation for your campus. They will try to be as accommodating to your needs as they can be. You must realize, however, that not all functionalities that exist in your present system will be transferable to ALEPH, and that ALEPH can have seemingly similar functionalities that work in entirely new and different ways. At the end of these three meetings, your staff should have had input into creating the plan that will 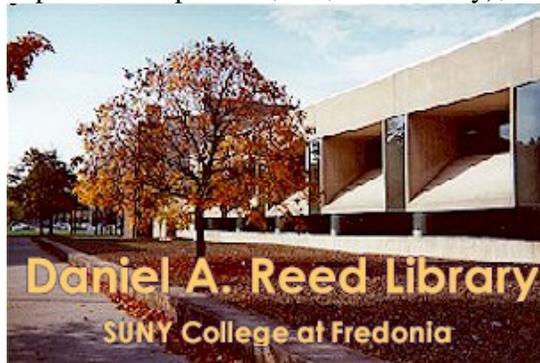be followed for your site's migration. It is important that someone at a given SUNY site understands the nature of the databases that are going to be migrated. For Fredonia, I was that person. Because Fredonia is one of only two campuses that used PALS as their library management system, we relied on the good people at PALS Tech Support in Mankato, MN to get us through the difficult parts. We are also very happy to report that our "difficult parts" were really minimal.

Fredonia was on the "fast track" to ALEPH. As a result, one of the pieces of the ALEPH migration that I would like to have altered is the scheduling of the training sessions. For us, because we were being "shot out of a cannon", as Marlene Harris loves to say, there wasn't a lot of time for catching our collective breath in between training sessions. I would have preferred to have more time to play with the test databases, and then have a follow-up training session (possibly a combined follow-up, combining two or three major training sessions) where we could ask about what we had actually been experiencing prior to going live. However, our timing was such that it was impossible to do any follow-up locally. In fast succession we had training

for Cataloging, Circulation, web OPAC, the GUI OPAC, web OPAC Customization, Systems Librarian, Interlibrary Loan, Acquisitions, and Serials. At the same time as all of these training sessions, our staff was very busy pulling data, sending data to Ex Libris, and evaluating records as they were put up on our test version of ALEPH. We were thankful that most of that activity happened during intersession. Your institution will probably have a longer time period for evaluating the results of Ex Libris' work.

What would we recommend? First, get a solid working group of staff who know your present system well, who know how it works, and who know the history of the decisions that have been made with regard to cataloging policy (and other departmental policies, too, if necessary), and who know your current procedures. If you don't have anyone with at least intermediate HTML skills, you'd better find someone who can work in HTML. At Fredonia, Katie Loomis is that person. SUNY's Office of Library and Information Services (OLIS) is gearing up to be as helpful as they possibly can. However, even when a "SUNY-ized" version of the web OPAC is developed, there are going to be local requirements that will need to be implemented by someone on campus. When "rep changes" are made to improve your version of the software or to fix bugs, there has to be someone on site who can check to be sure the tables are changed, the web HTML files are updated, and the client software is configured and distributed. This is not rocket science, but it does require staff with some understanding of the system.

Second, find someone on your staff who knows how to extract data out of your present system. For Multilis sites, OLIS does this extraction after consulting with your staff. For libraries using other vendors, you'll probably work with that vendor's technical support staff in regards to data extraction.

Third, make sure that your technical services staff have a basic understanding of MARC. By that, I don't mean knowing every tag and subfield code. (ALEPH has good help screens that can assist everyone with this.) I mean try to get everyone who will be working with basic catalog records and MARC Holdings data to the point where they are not paralyzed by fear of the dreaded MARC format. As long as Circ., Acq. and Serials people know a 1xx is an author, a 24x is title information, an 853/853X is information for building prediction patterns for serials, with a little bit of training everything will be fine.

Fourth, make sure everyone is comfortable using a computer! Make sure they know how to use a mouse (or at least know how to find the alternate key commands). I realize that to some, this seems like a crazy suggestion, but there are still some librarians and library staff out there who never have to use their mouse for more than starting their computer up in the morning and shutting it down at night. To move to a full-blown Windows environment can be very upsetting for such people.

A major piece of advice: DON'T PANIC. There are people at Ex Libris, OLIS, and at your sister SUNY institutions that can give a helping hand. Those of us who are perfectionists are in for major problems. ALEPH is fairly sophisticated, and to get it to the stage of near perfection takes time, and it isn't likely to be there on DAY ONE. At Fredonia, we have let the campus know that the catalog is a "work in progress," and they'll see improvements from day-to-day or week-to-week. One of the "coming attractions" that most of our faculty are eagerly awaiting is the ability to gather together a list of Course Reserve items from our catalog, and email them to our

Circulation department for addition to ALEPH's Course Readings module. We held back this feature for our startup semester because we felt the staff had enough to deal with adjusting to and learning the new system without adding the pressure of teaching faculty members this new procedure.

Alongside the good people at Ex Libris, we have found the "pilots" email list and the North American Aleph Users' Group (ALEPH-NA@listserv.nd.edu) list to be very helpful. It is good to have colleagues across North America who have experience with some of the day-to-day "tweaking" that improves an ALEPH site. OLIS staff have begun implementing software that will allow web-based queries concerning ALEPH implementation and use, building on the information gathered from the Pilot campuses.

Profile	Settings	Feedback	Help
Daniel A. Reed Library Catalog			
Searching: Fredonia Prod BIB		Change ALEPH Database	
Advanced Searching		Results List	

Our migration was so fast that we didn't have much time to consider what we really wanted in a web OPAC. Hopefully, your migration will be more calm and thoughtful. We decided to go with ALEPH pretty much out of the box, with some relatively minor local adjustments. This strategy worked fairly well for us, but we DO intend to overhaul our web catalog when time permits (probably this summer) to give it a Fredonia look and feel. We definitely do not believe in reinventing the wheel, and you will find that other ALEPH sites are very generous in giving permission for others to use what they have developed. Two examples: we checked all of the North American ALEPH sites to see what kind of online help information they had developed/provided. In our minds, McGill University had the best, so we contacted their systems people, and they very graciously gave us permission to use whatever parts of their online help text that we wanted. Closer to home, Fredonia felt that our vendors list was probably fairly typical of most of the four-year colleges. We told Ex Libris if any of the other SUNY sites wanted to use our vendor database (with appropriate adjustments for their local identification numbers, etc.), that we would be pleased to allow its use. SUNY Oswego looked at our list, said something akin to "Aha!" and used what they wanted. We also helped SUNY Oswego with questions regarding migrating acquisitions records from BibBase/ACQ, a stand-alone acquisitions system that some SUNY units still use.

Just like those migrating geese, who travel together, using the draft of their neighbor's wings to conserve energy, the SUNY migrations will progress with assistance from those who have traveled ahead. Soon all of SUNY can benefit from the union catalog, shared authorities, shared student authentication, and fast delivery of materials from other SUNY units. My last word of advice: enjoy the ride!

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