Organizing Chaos
Training for a Library Service Platform Implementation

February 7, 2020

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Questions to Ask

• How is an LSP implementation different than standard training?
• What are the major considerations for developing a program?
• What models are there to follow?
• What structures work well?
• What tools are available to support training?
• How do you maintain it after go-live? (Added post-SUNYLA conf)
What’s So Special About Migration?

• Everyone is affected, directly or indirectly
• Major disruptions to some units (Circulation, Tech Services)
• Daily workflows *will* change
• Happens “generationally” – once a decade or two
• Happens in real time – once it’s live, staff can’t just “not use it.”
• Training on live sites or in sandboxes with limited data
<table>
<thead>
<tr>
<th>Questions</th>
<th>Consideration</th>
<th>Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who?</td>
<td>Gets trained?</td>
<td>Does the training?</td>
</tr>
<tr>
<td>How?</td>
<td>Format/mode? Registered/open?</td>
<td>Institution- or vendor-provided?</td>
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<tr>
<td>When?</td>
<td>The timeline for training (and training the trainers)</td>
<td>Balance with migration downtime and go-live needs, fiscal year, academic year, etc.</td>
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<tr>
<td>Where?</td>
<td>Online/in person?</td>
<td>In Production or in a Sandbox? With what data/whose data? (esp. important for consortia)</td>
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<td>In what order?</td>
<td>What skills are needed for Day 1, what can wait?</td>
<td>In a set sequence or as staff are able to?</td>
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<td>Self-assigned or other-assigned?</td>
<td>How to make sure the people who need training first get it, and others wait?</td>
<td>How to engage units only peripherally touched by the system? e.g, Digital collections, Archives, Conservation, etc.</td>
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Models of Training

- **High-Touch** – lots of hands-on, customized content; detailed formal support for staff; highly structured
  - UPenn’s handouts: https://guides.library.upenn.edu/alma !!!

- **Medium-Touch** – Anywhere in between

- **Low-Touch** – Use mostly/only vendor-provided materials; self-paced & self-directed; mostly online + vendor in-person; most useful for tech-comfy staff
Structure & Content

• Develop a Curriculum – break it into classes and sequences
  • General sessions for all staff: search, sets, jobs, item records, etc.
  • Functional areas >> Record or process lifecycles >> Specific features/needs
• Full-time or Volunteer trainers (“Train the Trainer”), or a mix?
• Standardized scripts/outlines or locally-created?
  • If locally-created, how do you ensure consistency?
• Content sources:
  • Customized for your institution/consortium
  • Ex Libris documentation & training materials
  • Other institutions (use w/attribution)
Tools

• Ex Libris Visits and Materials
• In-Person/Hands-on Trainings
• Individual Practice
• Informal Peer Support
  • Mentors or “buddies”
  • Learning Circles, Working Groups

• Web-Based Training
  • Webinars
  • Small Group Working Sessions
  • Short Videos
  • Documentation
    • Training Guides
    • Step-throughs
    • Reference lists
    • Policy
“Train the Trainers”

- Training Organizers
  - Develop Materials & “Scripts”

- Volunteer Trainers (Staff)
  - Functional Area Specialists (who learn training)
  - Training Specialists (who learn Alma/Primo VE)

- Staff
  - Same Functional Area (departmental working groups later)
  - Cross-functional training (learn other ways of approaching same task)
  - Learn how to pass training on to others
  - Turn around and become trainers themselves
In-Person/Hands-On Trainings

• Best way for most people to learn new technology/platforms

• Logistics-heavy unless you have infrastructure in place already for staff learning (still worth it)

• Considerations:
  • Trainer + Facilitator(s) for more complex topics
  • “Teach the tool” – you’re not teaching people how to do their jobs, you’re teaching them a new tool
  • Distinguish between policy/procedure and “this is how Alma works”
Web-Based Training

- Video
  - Webinars
- Small group working sessions
- Videos (short!)
- Documentation
  - Training guides
  - Step-throughs
  - Reference lists
- Policies

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Informal Peer Support

- Discussion lists or forums
- Working Groups/“Gardening Glove” sessions
- Learning Circles
  - Café Alma as an online learning circle
- Mentors
- “Buddies” – like workout buddies, only for going through training!

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Practice!

• Sandboxes, then live sites

• You will not learn everything you need just by attending or watching training

• CARLI: https://www.carli.illinois.edu/products-services/i-share/alma/sandbox, especially the Best Practices at the bottom

• UPenn: https://guides.library.upenn.edu/alma
Post-Migration/Implementation Training

As we all know, Alma is still in active development and – as software-as-a-service – will always be changing. How do systems librarians and staff keep up with training?

- **Update documentation based on monthly Release Notes & share highlights with staff via whatever communication tools works for your staff**
  - Do this before anything else, and do it as well as possible.
- Schedule webinars/presentations/small group sessions to review updates that have a significant impact on local workflows
- Encourage informal peer support groups to discuss and work through these updates with real examples
- Update training scripts as needed, and update videos when they are significantly out of date
- Encourage staff to practice and stay on top of updates as needed
Examples
Harvard University Library

• **Vendor In-Person & Admin Training**: only for Migration Working Groups
• **Training Working Group**: developed custom curriculum & training materials
• **Train the Trainer**: ~60 staff volunteered to lead & facilitate in-person training
• **Pre Go-Live**: Hands-on training in labs on campus for 750 staff, some just two classes, some 6 or more.
• **Post Go-Live**: Decreasing # of hands-on classes, developed videos
• **Long-term**: Self-paced online training using existing videos & documentation

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SUNY Library Consortium Overview

• **Vendor In-Person & Admin Training**: Implementation Team, Institutional Leads, Working Groups

• **Pre Go-Live**: Training Working Group and Shared Services staff developed online Short Courses & presentations for all SUNY staff

• Information sharing via Basecamp and Institutional Leads

• **Post Go-Live**: Increasing # of webinars from SLSS staff, Café Alma peer learning, in-person trainings in functional areas, first online course on eResources

• **Long-term**: LibGuides with pointers to existing presentations, some static videos, continued webinars from SLSS in decreasing frequency, support for campus-based training, peer learning
SUNY Library Consortium

- **SUNY’s implementation team** - responsible for migration from Aleph to Alma for 60 campuses
  - Members had release time from their position
    - 1 member at 100% release time for 2 years
    - 2 members 50%
    - 1 member 20% release time
    - 3 members of OLIS working 50-60% on data clean-up in Aleph

- **Working groups**
  - Working groups were charged with developing policies and evaluating/creating workflows
  - SUNY Working Groups:
    - Analytics
    - Access Services & Resource Sharing
    - Acquisitions
    - Discovery
    - Data migration
    - Electronic Resources
    - Metadata
    - Network Zone
    - Systems
    - Training

Slide by Margaret McGee, SUNY Library Shared Services
SUNY Library Consortium

• **SUNY-wide training was designed to ensure campuses were able to use Alma/PrimoVE on day 1**
  - Alma facing workflows
  - Patron facing workflows
  - Student Information System (SIS) loads

• **Training was a one-size-fits-all approach**
  - Lesson plan and curriculum map developed to guide training
  - Training focused on best practices that fit the majority of campuses’ needs

• **Training was often reactionary and responded to the needs expressed by campuses**
  - Hear the need
  - Find someone who can lead the training
  - Develop the training based on
  - Lead the session

Slide by Margaret McGee, SUNY Library Shared Services
Ex Libris’ suggestion to identify trainers through train the trainers approach yielded mixed results
  - Working group and vanguard members often time did not have enough time or comfort with Alma/PrimoVE functionality to provide training

Trainers were often only one step ahead
  - Learning the functionality prior leading the session
  - Training was created from a base-level of understanding

FAQs were initially written
  - To create content in small useable bites
  - To answer generic Alma/PrimoVE functionality questions
The formation of the SUNY Library Shared Services (SLSS)
- 8 full-time members
- Extra-service members – number fluctuates based on need
- Hired a Training Consultant

Training shifted from reactive to proactive
- Identified where training gaps existed
- Developed training to meet the existing needs
- Developed training to meet future needs

Training sessions are planned in 6-month increments

FAQs
- Answer SUNY questions
- Place for workflows
- Configurations

Slide by Margaret McGee, SUNY Library Shared Services
Coordinating staff training during implementation

Abstract
When Williams migrated to Alma/Primo in Summer 2016, we needed an easy way to distribute Ex Libris training materials to our staff. We decided to use Canvas, a learning management system, to organize, disseminate and track staff training. Hear about what worked, what didn't, and how effective the “flipped classroom” training model was for our implementation.

http://documents.el-una.org/1514/

When staff become students: Using a Course Management System for Alma training

Abstract
When the CSU Libraries decided to migrate to Alma, I suspected the most challenging part of the migration would be training staff. How do you approach such a huge training task when most of the people in libraries are already overworked? People need to be able to access training materials in a way that fits into their schedules. Course management systems offer an excellent option for asynchronous learning and tracking participation. In this session, I’ll walk through some of the CMS tools I used to create our Alma Training course at Sonoma State. I’ll talk about what worked and didn't work in the training process, and how our approach evolved over the course of implementation. I’ll demonstrate some of the features of our CMS, Moodle, and talk about similar features in other CMSs. I’ll talk about how to apply pedagogical best practices to Alma training, and how to use some of the skills many librarians already have and apply them when developing Alma trainings.

http://documents.el-una.org/1527/

- CMS provides structure
- Vendor documentation for content
Alma/Primo Training

February 4, 2019

This week the PALS Staff will begin a series of webinars and Q&A sessions to assist you in making the most effective use of Alma and Primo. Many of the sessions being held during the first two weeks of February are Q&A sessions. As you work with Alma and Primo, begin to jot down your questions so you can bring them to the sessions.

The full training schedule is [here](https://www.mnpals.org/training-february_4_2019/).

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**Alma/Primo Training** Updated 3/14/2019

***Note: The Primo Q&A training scheduled for March 21 has been changed to 3:00.***

Following is the training being offered by the PALS staff to help library staff make effective use of Alma and Primo.

Most of the training will be done via webinars. Sessions will be recorded for those that cannot attend or those that wish to review the training at a later time.

In addition to the webinars, we are planning in-person training beginning in late March. Watch for more information.

**Monday, February 4, 3:00 — 3:30**

- **Topic:** What’s Wrong: Figuring out why an item isn’t loaning as expected
- **Intended Audience:** Configuration Staff and others who are interested in why item is not loaning correctly
- **Presenter:** Etta Thornburg
- **Link:** [https://webmeeting.minnstate.edu/ettathornburg](https://webmeeting.minnstate.edu/ettathornburg)

**Tuesday, February 5, 10:30 — 11:30**

- **Topic:** Films on Demand import training
- **Intended Audience:** Library staff who will need to import MARC files from Films on Demand and anyone interested in learning more about import profiles.
- **Presenter:** Dani Kroon
- **Link:** [https://webmeeting.minnstate.edu/danielakroon](https://webmeeting.minnstate.edu/danielakroon)
References

• Harvard University Alma Wiki
  https://wiki.harvard.edu/confluence/x/B10WDQ

• SUNY Shared LSP Training Guides
  https://slcny.libguides.com/lsptraining

• ELUNA Document Repository
  http://documents.el-una.org/

• CARLI: https://www.carli.illinois.edu/products-services/i-share/alma

• Ex Libris Alma Knowledge Center:
  https://knowledge.exlibrisgroup.com/Alma
Questions or Discussion?

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