Responsibilities & workflows

Keeping agile in a rapidly changing environment

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Pre-migration planning

- Initial workflow planning in-house
  - Limited & problematic test environment

- Consortial workflow planning
  - Some of the same problems with test environment
  - Shared policies & procedures

Going Live

- User roles/permissions
- Initial Workflows
    - Receiving
    - Serials check-in instructions
    - Order templates
- Testing, Documentation, Training

Alma Zones

- Institution Zone (IZ)
  - Institution-specific data
    - Cataloging data
    - Acquisitions data
- Network Zone (NZ)
  - Shared bibliographic records
- Community Zone (CZ)
  - ExLibris catalog, global authorities, e-resources

Cataloging Workflows

- Mason only
- Shared items
  - They have a better record
  - We have a better record (or upgraded one in OCLC)
    - Import, copy/merge, copy/overlay
- Overlaying brief bibs & gift cataloging
- Other changes
  - New location names and codes
  - New local fields
  - Where records were loaded
  - Google form for oddities
  - Linked Data

Working with Resource Acquisitions

- Creating documentation for each other
- Training each other in functional areas
- Developing forms to facilitate work of other departments

Linked data

- Local linked data
  - Bulk record loads vs. individual records
  - Adjusting staff responsibilities & roles
- Consonsortial linked data
  - Collaboration with George Washington University
  - Initial focus is on records that already have linked data

Takeaways

- Importance of flexibility & willingness to adapt
- Communicate!
- Accept that mistakes will occur
- Teamwork, teamwork, teamwork

Questions?

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