Alma: a Different Type of ILS

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Invited Speaker – PTPL 2017, Baltimore, MD

My first piece of library conference swag (1995)

We Work
Where You Work.

It continues to serve its purpose today!

About me:

- Worked at UT Library for 25 years
- Cataloging, Serials/Acq
- Desktop Support
- ILS Management
- Currently manage the Enterprise Systems team (Alma & Primo)
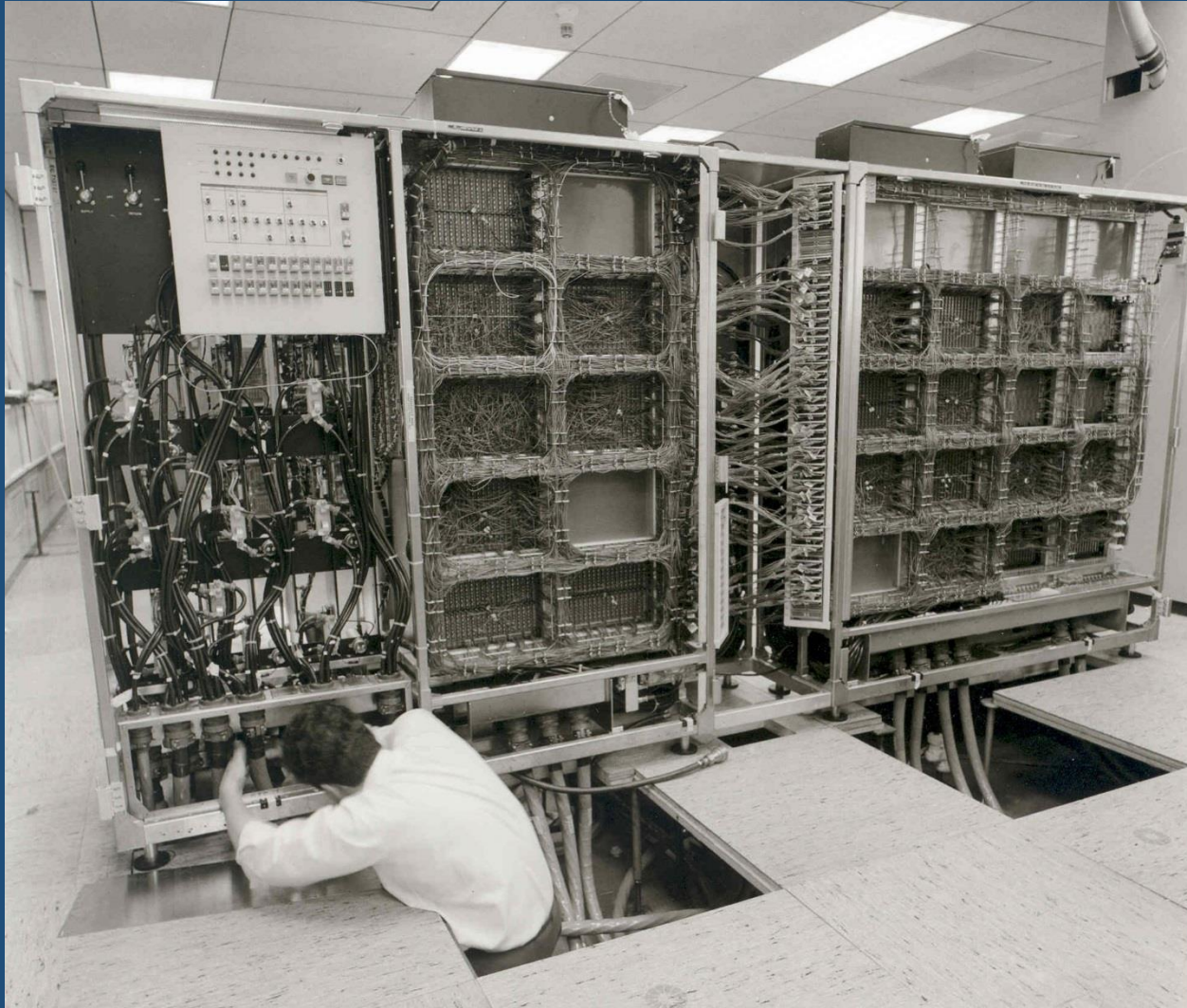- Active cave explorer & mapper

For today:

- Problems with traditional ILS systems
- Historical overview of library systems at UT Library
- UT's experience moving to Alma
- Advantages & disadvantages of Alma
- Is Alma an ILS for the long-term?
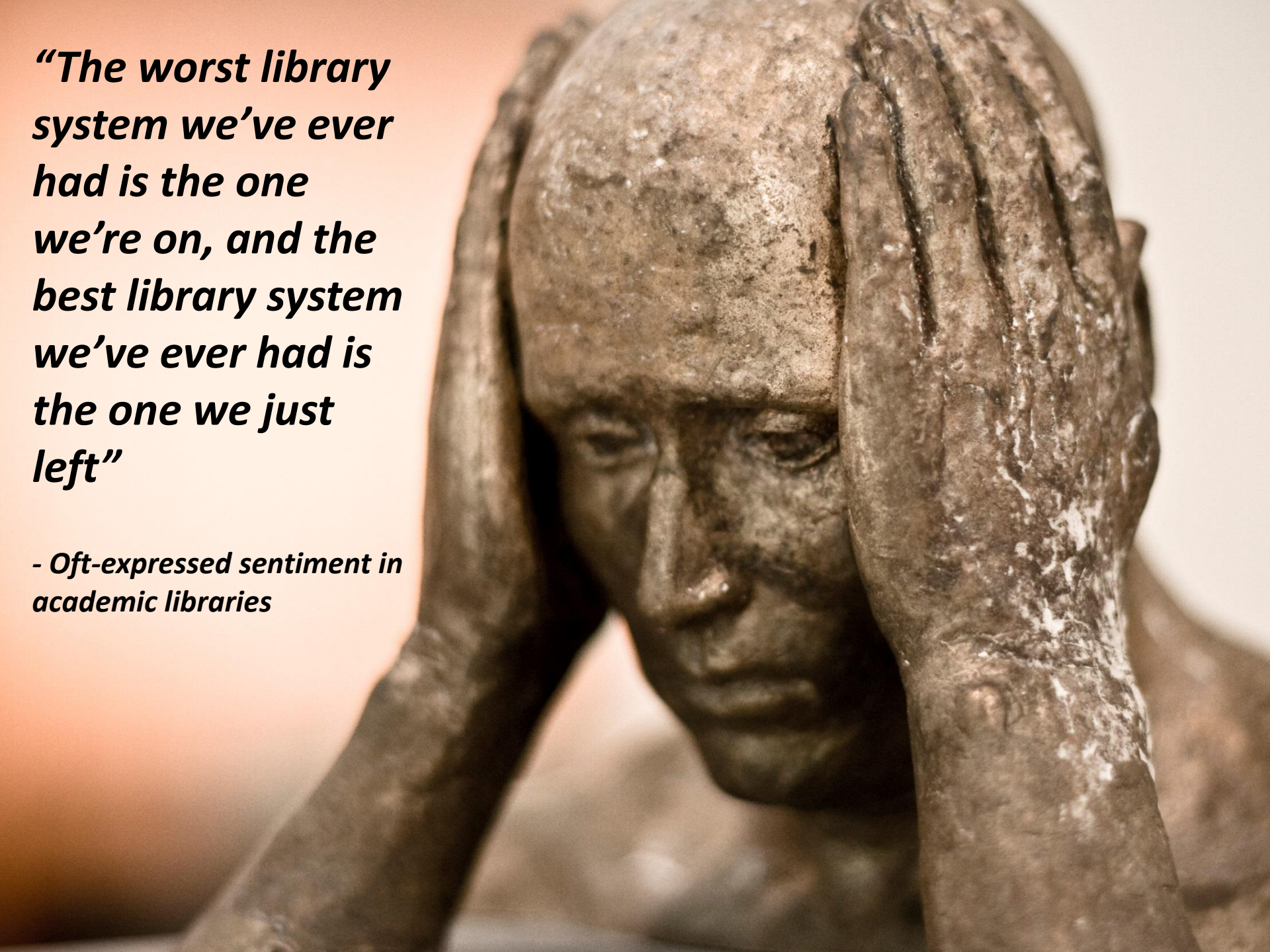
Problems with Traditional ILS Systems

Problem #1: Perception

"The worst library system we've ever had is the one we're on, and the best library system we've ever had is the one we just left"

- Oft-expressed sentiment in academic libraries

Problem #2: System silos & lack of integration with other systems

- **ILS**
- **Electronic Resources**
- **Digital Collections**
- **Campus Enterprise Systems**
  - **Student Information System**
  - **Financial System**

Problem #3: Fewer staff (esp. in Technical Services areas)

Increased reliance on getting "more with less"

Problem #4: Frequent switching of systems

- Many libraries switch systems every 6-8 years
- Creates tremendous amount of migration work
- Pre- and post migration data clean-up
- Sense that "we will never get caught up"
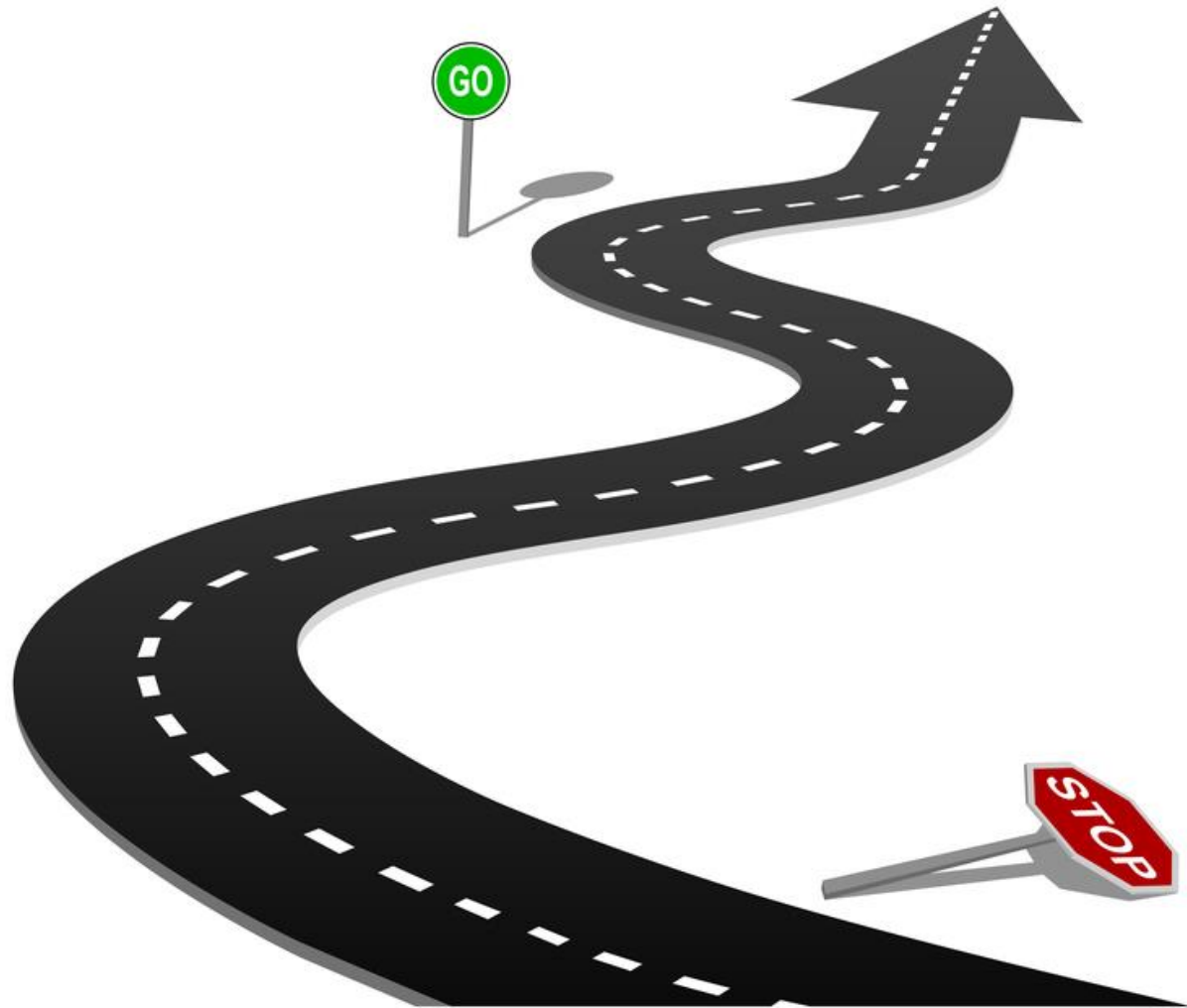
Other Problems with Traditional ILS Systems

- Non-hosted systems require site expertise in hardware/server/security management
- GUI-based client updates can be inefficient and intrusive

"Big picture" problem #1:
Systems have not kept up with rapid change

"Big picture" problem #2:
Early adoption vs. behind the curve?

Library Systems at UT

History of Library Systems at UT

- **Geac 8000** (Circulation)
  - 1983 – 1997
- **Geac 9000** (Cataloging, Serials & Acquisitions)
  - 1985 – 1997
- **Horizon** (Cataloging, Serials & Circulation)
  - 1997 – 2003
- **Geac 9000** (Acquisitions)
  - 1997 - 1999
- **Geac Advance** (Acquisitions)
  - 1999 – 2003
- **Aleph** (Cataloging, Serials, Circulation, & Acquisitions)
  - 2003 – 2014
  - First integrated ILS
  - Separate e-resource management (SFX)

Why switch to Alma?

- Using Aleph since 2003; general sense we were ready for a new system

- New library dean in 2012 (Steve Smith)

- Administrative push in 2013 to cease server hosting and move to the cloud

- Desire to make workflows more efficient

UT's Experience Moving to Alma

All the migrations I've worked on have been a whirlwind ...

... but this one seemed especially like a maelstorm.

Three migrations in one:

- Existing ILS (Aleph) to Alma

- E-resources system (SFX) to Alma

- Discovery system (Primo)
  - Must implement Primo if not already using it
  - If already using Primo, must re-implement* from scratch

We learned this nugget about 4 months into the Alma migration

UT's Experience Moving to Alma

- Six month migration timeline
- Worked closely with ExLibris migration team
- We were considered an "early adopter" of Alma, so ExLibris was testing some things out on us, which made for a challenging migration
- Did not receive Alma configuration training until the *end* of the migration
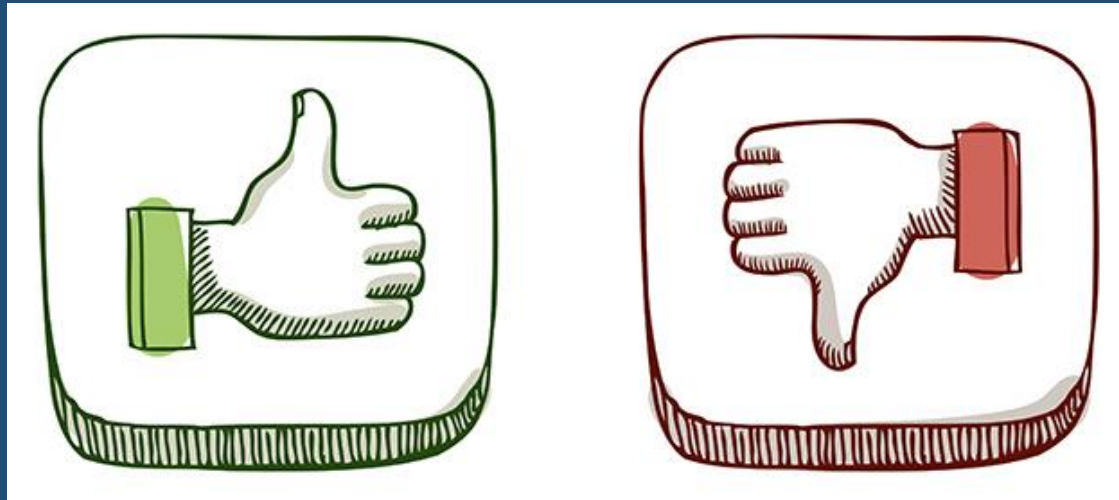
Don't forget your data …

Although it feels like a sprint, implementing Alma should be treated like a *marathon*

Know that the road is long, but there is a end

Advantages & Disadvantages of Alma

Advantages

- System uptime is incredible
  - Apart from occasional scheduled overnight maintenance, we've experienced only two instances of unexpected downtime lasting longer than 1 hour (80 mins, 6 hours)
  - https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Uptime_Reports/North_America

- Accessible in many places
  - Browser-based access (Chrome, Firefox, Safari, Edge)
  - Tablet-capable
  - Android and iPhone apps for limited functionality (Scan In Items, Pick From Shelf)

- Alma as a system seems more integrated
  - Move away from a modular-type system
  - Integrated workflows

Advantages *(cont.)*

- Normalization rules for cataloging updates and record loading are powerful and accessible to staff
- Integrated Analytics with Oracle BI
  - Provides a means of locally distributing system reporting on a much broader scale
  - Enables institutions to share reports
- Excellent record loading functionality
  - Powerful and flexible loading templates
  - Scheduling
  - Good match profiling
- Tight integration between ILS and discovery (Alma – Primo)

Advantages *(cont.)*

- Powerful system tools for data cleanup and processing
  - Sets
  - Publishing profiles
  - System jobs
- Better leveraging of community-driven system aspects
  - Initial migration allowed for a seamless transition of e-journals to the Community Zone
  - Facilitation of certain E-resource workflows in CZ
  - Access to community records for Cataloging

All titles ▾ | Keywords ▾ | [search] 🔍 | Advanced ▾

Welcome, Rogers, Michael | Friday, October 20, 2017

⊕

🕐 Recent Pages

> Manage Exports
Admin

> Design Analytics
Analytics

> Manage Patron Servi...
Fulfillment

> Publishing Profiles
Resources

> Import
Acquisitions

Sandbox(es) ▾

✓ sandbox01-na.alma.exlibrisgroup.com ☒
of your institution (07/05/2017)

More info ›

New UI Usage ▾

Active Users ❓

67%

● 120 users are using the new UI.

● 59 users are using the old UI.

Primo Dashboard ▾

LAST PUBLISHING JOB DETAILS

Starting Time	10/19/2017 10:16: PM, EDT
Status	Completed Successfully
Type	Incremental

Publishing Jobs List ›
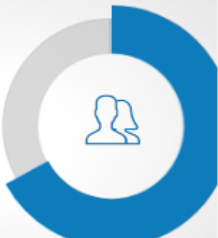
Tasks ▾

65	Other Requests	›
2871	Order Lines	›
72	Invoices	›
3	Items	›
58	Electronic Resources	›

Scheduled Jobs Status ▾

| 10/20 | 10/19 | 10/18 | 10/17 | 10/16 |

✓ Acquisition

✓ Administration

✓ Data services

✓ Fulfillment

✓ Import

✓ Publishing

✓ Repository

✓ Users

✓ Scheduled Jobs Completed Successfully

Search | All | | → | Advanced | Help ▾ | Sign Out

Catalog

Home | Catalog | Favorites ▾ | Dashboards ▾ | New ▾ | Open ▾ | Signed In As **mrogers3** ▾

Location /Shared Folders/University of Tennessee, Knoxville/Reports/ARL Stats | ☐ Show Hidden Items

Folders

- My Folders
- Shared Folders
  - Alma
  - **Community**
    - **Reports**
      - Consortia
      - Ex Libris Development
      - Institutions
      - Regional User Groups
      - Shared Reports
      - Support
  - Leganto
  - University of Tennessee, Knox
    - Subject Area Contents
    - Dashboards
    - Prompts
    - Reports
      - Accreditation Reports
      - Acquisitions
      - ACR
      - Administration
      - ARL Stats
      - Assessment
      - Book Feeds

Tasks

ARL Stats

- Expand | Rename
- RSS | Create Shortcut

Type [All] | Sort [Name A-Z] | ☐ Show More Details

Alma_ARL_Loan Counts for FY2014/15 | Last Modified 4/25/2017 12:57:52 PM | Owner 3753276540002311_2311_D
Revised Mike's analysis to exclude in-house loans and reserves (Louis, 4/25/2017)
Open | Edit | More ▾

ARL Stats - Loan Counts for Preston, FY2014/15 | Last Modified 7/31/2016 3:47:49 AM | Owner 1763216990002311_2311_D
This report finds the loan counts for Preston for FY2014/15. Note that the counts only include loans between 12/18/2014 and 06/30/2015 since we came up on Alma on December 18, 2014. Requested by Martha Earl. (Mike, 2015/10/19)
Open | Edit | More ▾

ARL Stats - Memberships spent | Last Modified 8/8/2017 1:52:12 PM | Owner 1763216990002311_2311_D
This report finds all the memberships that were spent for a given fiscal year. This amount is subtracted from the total spent against 463120 and is usually provided in question 7b (Ongoing library materials expenditures). Requested by Regina Mays. (Mike, 2015/10/21)
Open | Edit | More ▾

ARL Stats - Unlabled Memberships | Last Modified 9/8/2017 12:23:30 PM | Owner 3753276540002311_2311_D
Retrieves spending on titles which per Mike Rogers should be counted as Memberships but are not titled as such. (Louis, 9/8/2017)
Open | Edit | More ▾

ARL Stats question 1 - All Titles | Last Modified 7/31/2016 3:47:49 AM | Owner 1763216990002311_2311_D
This analyses finds a distinct title count for all titles in Alma. The three figures represent Microfilm, Electronic, and Physical titles, and should be added together to obtain a total count. (Mike, 2015/10/20)
Open | Edit | More ▾

ARL Stats question 1 - Preston Title Count | Last Modified 7/31/2016 3:47:49 AM | Owner 1763216990002311_2311_D
This analyses finds a distinct title count for the titles in the Preston Medical Library. The total from this analyses should be subtracted from the "All Titles" query to obtain the figure for UT Library. (Mike, 2015/10/20)
Open | Edit | More ▾

ARL Stats question 2 - Preston Volume Count (physical & e-books) | Last Modified 7/31/2016 3:47:49 AM | Owner 1763216990002311_2311_D
This report finds a volume count for Preston Medical Library as of June 30, 2015. By ARL definition, the count includes physical volumes and e-books, but not e-serials. In the future, modify the Creation Date value for whatever end date is needed. Requested by Martha Earl. (Mike, 2015/10/19)
Open | Edit | More ▾

▶ Preview

Disadvantages

- It is a **LOT** of work to migrate
  - Much work even beyond 6 month migration period
- No more direct access to back-end database
- Onus on customer to configure third-party integrations
  - SAP
  - Banner
  - Patron loading

Disadvantages

- Subscription-based pricing model
  - More useful to a wider audience than the traditional functional areas
  - More faculty/staff using Alma = more $$$
  - Sites should carefully consider # of users accessing system and monitor via Analytics
- Data migration issues can inhibit successful use of system
- Staff find it difficult to understand the philosophy behind Alma workflows (especially Acquisitions and ordering workflow)

Alma Monthly
Release Updates

ExLibris Ideas
Exchange
http://ideas.exlibrisgroup.com

ExLibris system
alerts (e-mail)

Knowledge Center
https://knowledge.exlibrisgroup.com

Alma & Primo
enhancement process

Challenge keeping up with…
Communication

Primo-l listserv

Alma-l listserv

ExLibris System Status page
http://status.exlibrisgroup.com

Developer Network
https://developers.exlibrisgroup.com

Primo Quarterly
Release Updates

ExLibris maintenance
alerts (e-mail)

SalesForce
https://exlibrisgroup.my.salesforce.com

Trivia Time!

Question: In 1924, PTPL officially met on its own for the first time. In what city and state did this meeting take place?

Answer: Richmond, VA

https://www.potomactechlibrarians.org/moments

Alma: an ILS for the long term?
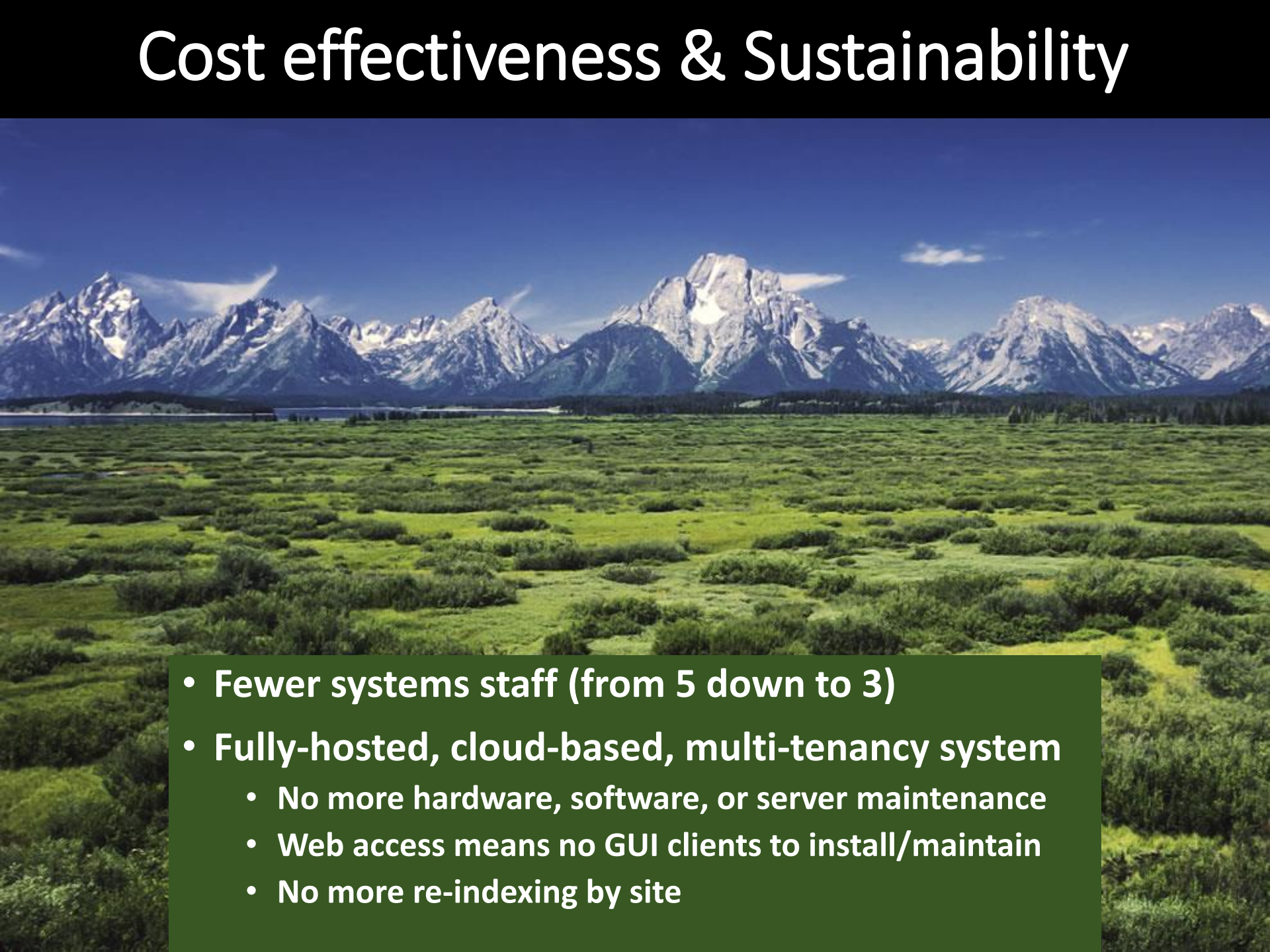
Ingredients for a long-term ILS

1. Cost-effective
2. Sustainable architecture
3. Able to keep pace with rapidly changing times
4. Must fulfill a library's work needs
5. Ease of use for staff/faculty

How does Alma measure up?

Cost effectiveness & Sustainability

- **Fewer systems staff (from 5 down to 3)**
- **Fully-hosted, cloud-based, multi-tenancy system**
  - **No more hardware, software, or server maintenance**
  - **Web access means no GUI clients to install/maintain**
  - **No more re-indexing by site**

Timeliness

Monthly updates to sandbox and production

Fulfilling UT Library's work needs

- No "show stoppers"
- All work we previously did is possible in Alma

Unfortunately …. ease of use for staff and faculty still an issue in certain cases

Good news!
Customer/Vendor Collaboration

Alma UX Project

- Project sponsored by ExLibris to improve "user experience" of Alma

- Nine participating institutions:
  - Getty Research Institute
  - Northwestern University
  - University of Tennessee
  - University of Wisconsin
  - KU Leuven
  - Monash University
  - State Library of Queensland
  - University of Mannheim
  - University of Oslo

Goals of UX Project

- Gather feedback from Alma customers on how the system is used

- Improve Alma usability & satisfaction through a re-design of the user interface (UI)

- Better integrate UX processes into Alma development cycle

Old UI

New UI

Old UI Search Results

New UI Search Results

Acquisitions   Resources   Fulfillment   Admin   Analytics

All titles ▾ | Keywords ▾ | caves | 🔍 | Advanced ▾

All Titles (1 - 20 of 758)   caves ✏   Save Query

Sort by

Rank ▾

🏠 Institution | 👥 Community

Expand ▾   ⬈   ⚙

Material Type ∨
Book (596)
Computer file (1)
Journal (24)
More (3) ▾

Resource Type ∨
2D non-projectable graphic - Physical (1)
Audio musical - Physical (4)
Book - Electronic (150)
More (13) ▾

Language ∨
Chinese (4)
Dutch (1)
English (725)
More (13) ▾

Publication Year ∨
1680 - 1985 (187)
1986 - 2001 (188)
2002 - 2009 (160)
More (2) ▾

1
Caves / by George Laycock ; illustrated by DeVere Burt.   Edit Record | Holdings | ⋯
Book {Book - Physical} By Laycock, George.   Language: English
(New York : Four Winds Press c1976.)   ISBN: 0590073923 :
Subject: Caves--Juvenile literature.   Record number:
(TU)000039841UTK01
● Physical (1)   Electronic   Digital   Other details
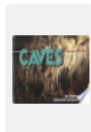
2
Caves / by Stephen Kramer ; photographs by Kenrick L. Day.   Edit Record | Holdings | ⋯
Book {Book - Physical} By Kramer, Stephen P.   Language: English   🛒 Orders: 1
(Minneapolis : Carolrhoda Books c1995.)   ISBN: 0876144474 :   Requests: 1
Subject: Caves--Juvenile literature.   Record number:
Series: Nature in action (Minneapolis, Minn.)   (TU)001021151UTK01
● Physical (2)   Electronic   Digital   Other details

3
Exploring caves [graphic] / U.S. Department of the Interior, U.S. Geological Survey.   Edit Record | Holdings | ⋯
Visual material {2D non-projectable graphic -   Medium Type: [graphic] /
Physical} By Geological Survey (U.S.). (Reston,   Language: English
Va. : The Survey 2000)   ISBN: 0607941782
Subject: Caves--United States--Posters. Caves--   Record number:
Study and teaching.   (TU)001342423UTK01
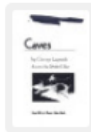● Physical (1)   Electronic   Digital   Other details

4
Texas caves / Blair Pittman ; foreword by Francis Edward Abernethy.   Edit Record | Holdings | ⋯
Book {Book - Physical} By Pittman, Blair,   Language: English
(College Station : Texas A&M University Press   ISBN: 0890968497 (cloth)
c1999.)   and others
Subject: Caves--Texas.   Record number:

Makeup of Project

- Monthly WebEx calls with ExLibris and other participating institutions
- Periodic assignments
  - Synchronous "user studies" with ExLibris working on a specific task
  - Asynchronous "user surveys" related to Alma functionality and/or workflows
    - Focus right now on usability, not functionality

In summary …

- Alma has great potential as a system for the "long term"
- Best aspects of Alma are:
  - Sustainable architecture
  - Able to keep pace with rapidly changing times
  - Usefulness across the entire library spectrum (not just Tech Services & Circulation)
- Areas still needing work
  - Ease of use for staff (more work with Alma UX project)
  - Better communication from ExLibris on philosophy behind Alma workflows

Thank you for your attention!
Any questions?

mikerogers@utk.edu

Kevin Zinn in Merrybranch Cave, Tennessee