

Alma & Change Management

Name	Institution
Margaret Colmer	University of Adelaide
Greg Shute	RMIT University
Debbie Storz	Swinburne University of Technology
Phillippa Stott	University of Western Sydney
Fiona Burton	Macquarie University
Jenny Quilliam	University of South Australia

Moderator: Jason Thompson (University of Auckland)



THE UNIVERSITY
of ADELAIDE



CRICOS PROVIDER 00123M

Margaret Colmer

Alma fulfillment

adelaide.edu.au

seek LIGHT

Functional benefits

- NCIP integration (Relais ILL)
- Seamless requesting – Alma and Relais via Primo
- Efficient workflows – on shelf requesting
- Title level requests
- SMS messaging – integrated and immediate
- Immediate notices (due date changes)
- Paperless and cashless
- Automatic renewals (loans)
- Easy renewal of patrons (renew and investigate)

Policy reviews

- 2012 demerits – turned off demerits for overdue items, tightened schedule for invoicing recalled and reserve
- 2013 new borrowing rules – two categories of users and two borrowable loan periods (supports Beacon strategic plan <http://www.adelaide.edu.au/VCO/beacon/>)
- 2013 introduction of on shelf retrieval – very popular with users, especially staff and researchers

Putting the user first

- Liaison Acquisition, Metadata and Access Services (LAMA)
- Ensures that technical services workflows for physical items reviewed through a fulfilment workflow to ensure no barriers created for users
- Provides forum to review past decisions in context of Alma fulfilment

Challenges

- Slip printing needs a redesign
- Missing – status dates required
- Reserve due back date
- Copyright declaration for digitisation eagerly awaited
- Security roles for user management – requires more definition
- Automatic membership renewal letters

Fulfilment workflows in Alma

ANZREG 2015

Greg Shute RMIT

Popular improvements

1. **hosted, browser interface.**
2. **Emails** for holds, etc delivered immediately
3. **lending history** of any item is preserved
4. **patron registration screen** is laid out on a single page
5. **pop-up block** indicators

improvements...

6. **holds picklist** with item barcodes
7. **fines screens** are clear for every item
8. **Fulfilment configuration utility.**
9. Various “**back office**” **tools** eg bulk change to due dates, bulk changes to patron records, bulk waiving of fines.

Problematic workflows

1. **printing holds slips**
2. online browser means Alma **book returns are as slow** as the local RMIT network
3. Alma “**return items**” screen is not always **reliable**

problems...

4. **Workflow for tracking Missing items**
5. **Closed Reserve workflows** seem awkward
6. **OPAC via Primo** gives incorrect renewal information

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Alma, Change Management & Workflows of Electronic Resources

Debbie Storz - *Datasets Librarian*

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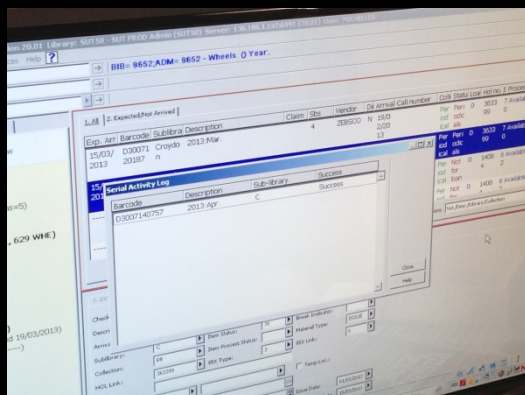
SWINBURNE
UNIVERSITY OF
TECHNOLOGY

Swinburne
▶ think **forward**

Background

- Budget for information resources is ~ \$5.8M with around 92% = e
- ANZ Alma regional development partners Oct 2010
- Implemented Alma in April 2013
- Small Department –
 - 3 Team Leaders in Acquisitions & Resource Management
 - 8 staff are a part of the three teams
- Strategy is to use all of Alma eResource management features - simply

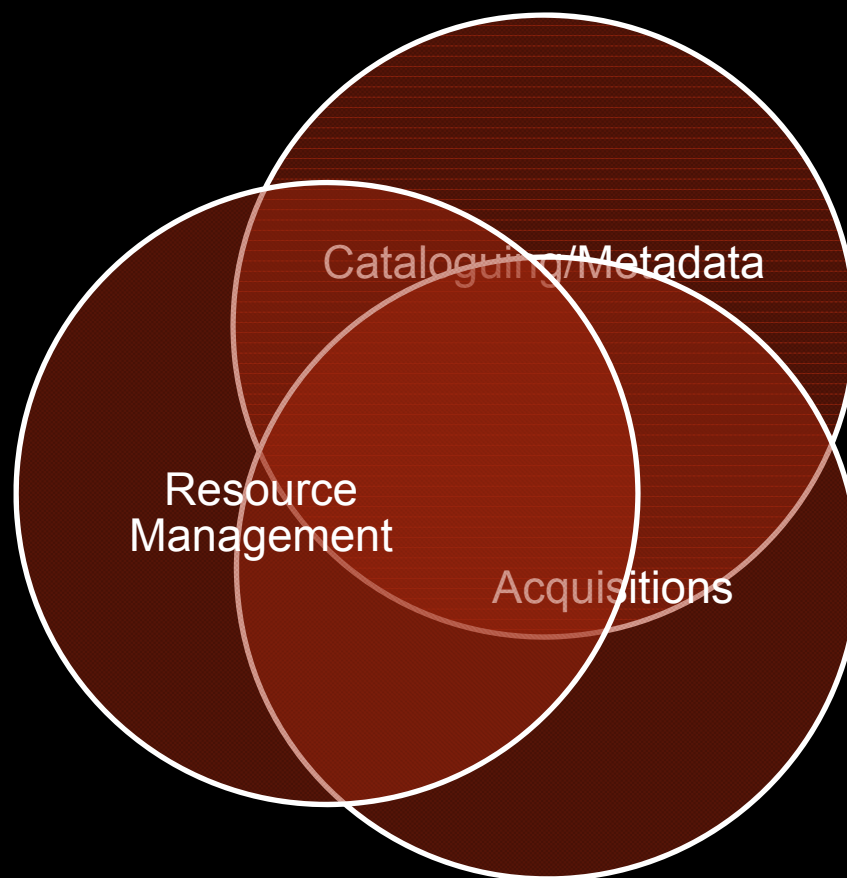
Acquisitions Cataloguing Resource Management



The Reality – 2 years later...



- Architecture of the electronic resource
- Metadata
- Order/Invoice
- Activation
- License
- Renewal/Annual Front list



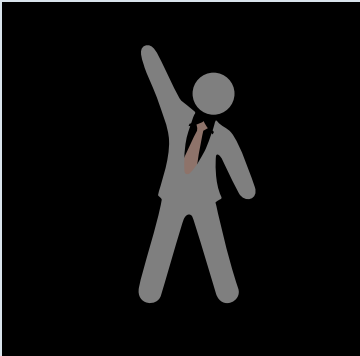
Any Further Questions?

Contact Details:

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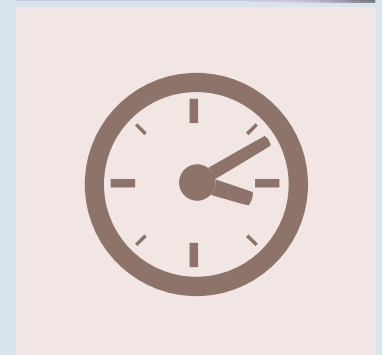
UWS Library LMS Workflow Changes

Adapting to the new ALMA environment



Philippa Stott

Manager, Information Resources
University of Western Sydney Library





Staffing



- Unified platform
- Multi-skilling initiatives
- E-Integration





Collections



- ERMS integration
- Order – Licence – Activate
- Primo Central integration



Patron Driven Acquisitions



36,000 titles

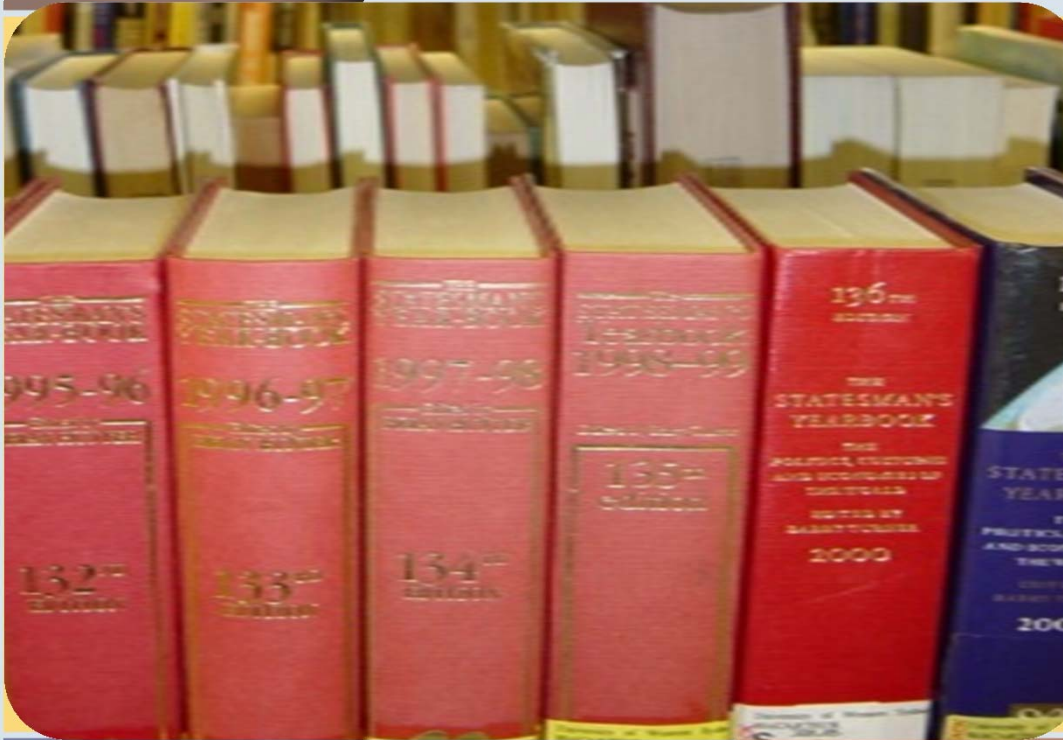


- Import records
- Change status
- Track purchases
- ALMA PDA functionality?





Book processing



- HEW-based – Receive & Invoice
- Shelf-Ready books
- Training tool – assign record

Thank You



MACQUARIE
University

Alma System Administration at MQ



Macquarie and Alma



Previous systems

- Voyager, Primo, Serials Solutions OpenURL, MARC journal and books records, Automated Storage and Retrieval System (ASRS)

Current status

- Alma live since 1st December 2014
- Primo live with new Alma version
- ASRS system upgraded to enable integration with Alma
- Transitioning from Serials Solutions OpenURL and MARC records to Alma

Staffing structure

Discovery Services and Systems Portfolio (within Collections & Discovery Services Department)

Accountabilities

- Develops, implements and evaluates the Library's discovery services, systems and their processes to ensure the acquisition, management and discovery of Library resources and University research output meet the learning, teaching and research objectives of the University. Collaborates and liaises with key stakeholders
- Initially the main focus has been Alma implementation
- Long-term involvement will include other systems, e.g. Symplectic, Fedora, Equella

Staffing structure

Discovery Services & Systems Portfolio

- Manager
- Librarians HEW7 x 2, HEW6 (recruitment process near completion)
- Although positions are in Collections & Discovery Services department they are responsible for working across the whole Library

Accountabilities

- Working with expert staff to investigate, develop processes and write documentation
- Training of staff in new processes
- Alma configuration, e.g.
 - Reports, emails, import rules, user profiles, EDI
- Primo configuration, e.g. harvesting, displays
- Analytics
- Need cross-Library view

Staffing structure

Library Technology Services

- Senior Systems Analysts – Library Systems (x2)

Accountabilities

- Responsible for integrations with University system, e.g.
 - Finance voucher interface
 - Patron loads into Alma
 - Shibboleth authentication for Primo
 - Negotiations with central IT, re other issues e.g sTunnel
- Development of Primo skins

How are we going?

Integrations

- Most of our systems integrations, e.g. patron and finance integrations are in place or in progress
- EOCR loading configured
- Bulk imports of eresources work in process
- EDI mono invoicing in process of being configured, serials not yet started

Data clean-up

- Major clean-up work performed in Voyager
- Electronic resources requires clean-up and set-up in Alma

Procedures

- Basic processes in place but we are still working out what we are really doing

How are we going?

Has Alma met our expectations?

- Too soon to have realized any gains as we are still turning things on and investigating options
- Automated processes we had in Voyager look like they (mostly) can be replicated in Alma
- Expectations we will see gains sooner regarding print monographs as we are seeing some automated processes starting to work, e.g. bulk loading, EDI
- Still understanding what is involved in electronic resources and their configuration
- Some staff are experimenting with bulk activations



MACQUARIE
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Thank you

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University of
South Australia

Library

Change Management Panel : System Administration

Jenny Quilliam

ANZREG Seminar 2015



**KEEP
CALM**

I'm your

**Certified
System Administrator**



**KEEP
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I'm your

**Certified
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- **Calendars**
- **TOUs**
- **Auto renewals**
- **Borrowing conditions**
- **Notices**



**KEEP
CALM**

**I'm Configuring
Calendars and TOUs**

- No Downtime (almost)
 - Monthly new releases
 - Bug fixes
 - Premium sandbox for testing
 - Review process prior to monthly release
-
- Delete permissions very powerful
 - Browser issues



- Management of roles & privileges
- The Named User audit

BEFORE:

185 accounts with roles other than Patron

- 4 Ex Libris accounts
- 7 generic or task specific accounts (Licences, URRSA, Patron loads, Spine label, etc)
- 10 are for 3 units we support
- 22 are for staff who do not use Alma on a daily basis

AFTER:

142 accounts with roles other than Patron:

- 4 Ex Libris accounts
- 15 generic or task specific accounts
- 120 for staff who use Alma on a daily basis
- Internal Admin account to allow access to Alma if LDAP fails.



**KEEP
CALM**

**I'm Counting
Named Users**

Analytics & Reporting

- Fewer 'low level' reports as staff use Sets
- Dashboard are great
- Shared & Community Reports

BUT

- We Really Do Miss the BLOB
- More fields need to be exposed for analytics



Source: <http://www.keepcalm-o-matic.co.uk>

Questions to the Panel?

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