

PURDUE

UNIVERSITY

Purdue University

Purdue University is a public, research-intensive university with a main campus and two regional campuses in Indiana and a student enrollment of 38,770. The University's schools and colleges include Agriculture, Education, Engineering, Management, Pharmacy, and Veterinary Medicine. Purdue has 12 libraries with a total staff of 160. The Libraries are members of the Association of Research Libraries (ARL) and hold collections of 3.7 million volumes.

Previous ILS/Systems: Ex Libris Voyager, SFX

Summary of Institutional Benefits:

- Alma provides the tools to manage all aspects of electronic resources
- Streamlined workflows support an environment of change and variety for staff
- Alma enables improved financial management and reporting
- Flexible tools support collection management and changing staff roles

Moving to Alma

The Purdue University Libraries have been transitioning from a print environment to a digital one, with more of their budget allocated to electronic resources. The Libraries concluded that their previous system's infrastructure, which was well-designed to manage physical collections, had not evolved sufficiently to support the growth of digital resources. Purdue was looking for a system with new tools to manage electronic resources effectively and to focus on processes that support e-resources. According to Paul Bracke, Associate Dean, Purdue was open to the opportunity to partner in the development of a cloud-based, shared system, and signed on as an Alma Development Partner. The concept of Unified Resource Management embodied by Alma matched the university's technology strategy of leveraging cloud-based systems to meet business needs. Purdue's goal in moving to Alma was to work differently, in more automated and streamlined ways, in order to focus staff on more strategic needs.

Impact of Alma

Electronic Resources Management

For Purdue, the ability to manage electronic resources in Alma has led to many service improvements to users as well as to library staff and administration. Instead of spreadsheets, paper files, and a separate link resolver, the library now benefits from an integrated system containing all needed information as well as tools to manage Purdue's growing electronic collection. Electronic resources managers appreciate the collection overlap analysis tool, which makes it possible to upload lists of titles in collections from vendors to identify titles that are already available to Purdue patrons. Purdue staff are using Alma Analytics usage reports to generate data for multiple years and show usage of titles on various platforms, thus assisting in collection development decision making. Populating records with license terms and exposing these to patrons is helping the ILL department to move away from

maintaining notes and spreadsheets to track licensing requirements. Since Alma integrates e-resource functionality with other library management activities, Purdue can now connect financial data to their e-resource purchases and subscriptions.

Technical Services Workflows and Staff Roles



“Alma allows Purdue to focus staff in more strategic ways”

Paul Bracke, Associate Dean for Research and Assessment

Purdue's collections are increasingly electronic, and with less print came the need to reconsider workflows, staff roles, and organizational structure. The unified nature of Alma has enabled the creation of a consolidated acquisitions department, combining monographs and serials, both print and electronic. Streamlined workflows support an environment of change, openness to new ideas, cross-training, and variety. Staff have learned to work with multiple formats, and can provide backup for any area. Alma task lists support the sharing of work and allow staff to track items through technical services workflows. Cataloging staff find Alma's Metadata Editor intuitive and easy to use. New staff learn to work with Alma quickly, and training is successful.

Purdue has taken advantage of the functionality in Alma to create record sets and apply batch changes. The staff have set up regular jobs to import records with embedded order data and EDI invoices. Record extracts have been particularly important for Purdue, paired with normalization routines. Purdue sends bibliographic records to HathiTrust, and

records are normalized and uploaded as an automated job to OCLC. In addition, Purdue staff have set up an OAI/PMH extract to publish e-resources records. These jobs are easy to set up and run automatically. Additional staff are being trained to create and work with sets, which allows tasks to be distributed more effectively and expands staff expertise.

Fund Management and Reporting

Alma has provided the Purdue libraries with significant advantages in the area of financial management and reporting. A new fund structure was created as part of the transition to Alma, and it is easy to make adjustments if needed. The collections staff can export a spreadsheet of their funds showing amounts allocated, encumbered, and spent, giving them accurate balances of money available to spend at the end of the fiscal year. The rollover process is straightforward and flexible, and Purdue was able to apply, for the first time, an automatic 5% increment to their continuing resources at rollover. Staff have created sets and applied changes at the time of rollover, assigning purchase orders to new and merged funds. With Alma Analytics, staff have access to dashboards and can run their own reports. Alma gives the Purdue libraries the necessary reports and data to control their budgets.



User Services and Interactions

The Purdue University Libraries were already involved in a staff reorganization when they implemented Alma. The reference and circulation desks were combined, and in the next two years there will also be a significant consolidation of libraries, with six libraries combined in a new building. Alma functionality supports the creation of new libraries and locations and enables the movement of inventory to new locations through set creation and batch change capabilities. Alma's user management configuration facilitates changes to user roles and assignments. Staff have individual user accounts, which aids in resolving problems, and student workers can be given appropriate permissions without needing to rely on systems staff. Alma library calendars are flexible in setting up open and closed parameters.

In Access Services, Alma Analytics provides accessible data and a delivery mechanism for reports.



Staff at each location can run their own report of missing items, perform shelf-checks, and then either scan in found items or withdraw the missing ones. Reports can then be shared with cataloging staff to do any additional work needed on the bibliographic records.

Updates and Communication

Staff at the Purdue University Libraries praised the monthly releases and communication from Ex Libris. Seeing the updated versions of Alma in the Sandbox a week early gives staff time to test and evaluate changes that affect operations. Each department looks at the relevant areas of the release notes and takes responsibility for updating procedures and documentation. System status updates come via e-mail to appropriate staff. The changing nature of Alma is an opportunity for staff to see new possibilities and also reflects the ongoing development of the system to meet library needs.