



## UNIVERSITY OF MANITOBA

### University of Manitoba

The University of Manitoba is a public, research-intensive institution in western Canada with two campuses and a student enrollment of 30,000. The University offers a broad array of undergraduate and graduate programs, as well as professional schools of Business, Medicine, Law, and Engineering. The University of Manitoba Libraries includes 19 libraries, and a staff of 300. The UML is a member of the Association of Research Libraries (ARL) and hold collections of 2.5 million volumes. Previous ILS/Systems: Sirsi/Dynix Symphony, Ex Libris SFX and Verde

#### Summary of Institutional Benefits:

- Alma supports staff creativity and imagination
- Integration with campus systems leads to significant service improvements
- User management provides flexibility in serving special user communities
- Data manipulation enhances the quality of bibliographic data
- Alma configurations and workflows promote staff communication and efficiencies

#### Moving to Alma

In 2013, the University of Manitoba Libraries developed a forward-looking strategic plan that emphasized integrated access to resources and the development of web-scale management systems. The library administration was aware of the need to implement an identity management system, create a more strategic budget structure, improve access to electronic resources, and consolidate separate resource management systems and knowledge bases. The Libraries was ready to take a fresh look at their processes in a new system that would be cloud-based and cutting edge.

ownership of their own system environment and reduce their dependence on the university's office of Information Services and Technology, where their needs often competed with other campus priorities.

The Ex Libris Unified Resource Management (URM) concept was appealing to UML, and they decided to move to Alma as Early Adopters. With Alma, UML could replace their separate, disconnected systems with a single service with all the parts integrated. UML was the first major unit at the university to move to a cloud-based system. Implementing Alma would enable them to take



# Impact of Alma

## Integrations

The University of Manitoba Libraries has achieved significant service improvements through Alma's ease of integration with campus and external systems. The use of LDAP authentication now allows for a single user login for all student services, such as e-mail, the campus learning management system, the student portal, and all library services, including interlibrary loan services based on Relais. This capability has resulted in a significant decrease in a student requests for assistance with usernames and passwords.

Financial data flows smoothly between Alma and the university's Banner finance system. Invoices are approved for payment in Alma, exported to Banner, paid in Banner, and reports are then exported back to Alma with exchange rates properly calculated and assigned. Invoices are now synced between Alma and Banner weekly and the entire process can be managed by ½ FTE staff member. This two-way transfer of data provides the actual payment amounts and check numbers, reducing the need for manual adjustments.

Alma's API gives the Libraries seamless access to up-to-date student data. Patron loads occur in real time as students register, and when students drop out or graduate, the records are removed automatically after a set grace period. The integration also allows the library system to communicate information back to the university about fines or other blocks on borrowing privileges, which may block other university services as well.

For acquisitions staff, Alma's ability

to interact with vendor systems for ordering, record loading, and invoicing saves staff time and improves service to users as well as to public services staff and administration.

## User Management and Communication

The University of Manitoba Libraries has taken advantage of Alma's user management features for both internal and external users. Management of staff and student worker roles is more efficient and less prone to errors. It is easy to determine what type of access has been assigned to staff, and Alma provides a reduced menu of actions for staff with fewer roles, preventing them from accidentally changing settings or records beyond their responsibilities. Managers can remove access when staff leave, and set expiration dates for student workers who leave for the summer. The staff now have individual user accounts, replacing the previous practice of setting up generic accounts for various staff functions. This improvement allows for appropriate follow-up on problems and offers the capability to see the history of staff actions.

Another welcome feature for UML is the ability in Alma to create user groups. The University has a separate health sciences campus with hospital-based patrons who are not part of the regular university user community. Lisa O'Hara, Head of Discovery and Delivery Services, explains that prior to Alma, the Libraries had used workarounds to provide separate privileges to the hospital staff. Now, library staff can



**“Alma has been built in a way that supports the way libraries work”**

Emma Hill-Kepron, Former Head of Systems at UML



manage them as a separate user group, assigning rights and privileges for everyone in the group and sending them appropriate notices and reports.

For public services staff, Alma facilitates communication with library patrons. Processing of patron requests is almost immediate, and thanks to Alma's support for storing attachments, staff can see all communications with students and refer to them while interacting with users. Alma sends timely overdue notices to both the library staff and patrons, and sends immediate recall notices. E-mail notices have replaced paper receipts for patrons. The use of Alma work orders supports internal communication and improved service, as public services staff can see if desired materials are checked out to a patron or being handled in a department where they might be retrieved for a user.



## Data Import, Export, Manipulation

Technical Services staff have appreciated the way Alma facilitates data importing, exporting, and batch manipulation of records. Les Moor, Head of Technical Services, states that record loading is flexible and powerful, with many options to allow staff to choose the job that's right for the task. Decisions can be made about what actions to take when overlaying existing records, which avoids the creation of duplicate fields when protecting local data. The process is fast and it can be run whenever it is necessary. Staff no longer have to stop working while load processes are run. Errors are clearly identified and the load history is very helpful. Les says that using Alma record loading is "wonderful, it's a modern

system."

The ability to export records is very important to the UML. Exported records may be sent to external databases, such as OCLC and Google Scholar, or generated for internal purposes, such as for troubleshooting or making batch changes to a set of records. Lisa O'Hara points out that you can export one record or many, create a set and then modify it, and that multiple staff can either load or export records at any time. Running jobs on sets of records saves staff countless hours of time over manual editing and updating. One important job for UML is to load a file of OCLC records and add just the OCLC control numbers to existing bibliographic records in Alma. This process facilitates the use of the OCLC control number for matching in many environments which will be very important for linked data in the future.

Les describes a project at UML that took advantage of Alma's data manipulation capabilities. Due to data inaccuracy in the legacy system, incorrect OCLC numbers were inserted into over 1 million bibliographic records. There was an identifiable pattern to the structure of these numbers, making it easy to isolate the records and create sets. Les created his first normalization rule to make several changes to these records, and the process ran correctly on his first try. All the records were fixed within a week. This highlights the flexibility of Alma's ability to manipulate data in a straightforward coding environment.

UML technical services staff mentioned other features of Alma that enhance productivity including: increased data elements in item records to improve searching and reporting; improved withdrawal processing with holdings records automatically updated when items



are deleted; and, the overall functionality of the Metadata Editor to support cataloging activities.

## Workflows and Efficiencies

Alma's configuration capabilities and its workflow-based design have contributed to improved collaboration, efficient management of resources, and shared responsibility among UML staff. The integration of print and electronic resource management within Alma, including the link resolver, e-resource management system, and acquisitions data, has eliminated the duplication of effort previously required in three separate systems. This integration also has facilitated reporting across formats for various needs, such as ARL annual data collection and financial reports to the university administration.

In Alma, configuration privileges can be assigned to staff by functional area, giving staff at middle manager levels control of the configuration within their own area of responsibility, and eliminating the need to ask systems staff to do this work for them. Role and record assignments allow staff to share responsibility for tasks across a department, and enable the distribution of work and coverage during staff absences.

Technical Services staff appreciate the ability in Alma to attach documents to records, such as correspondence with vendors or e-mails with special instructions or requests. This feature improves communication among staff who may be working on the same titles and archives important documents online that have an impact on the record or resource. The department

hopes to eliminate many internal print documents that are currently used in some areas of their operations. The export to Excel functionality in Alma is used frequently as well, for reporting, communication, and workflow management.

Alma's reporting tools are valuable to the University of Manitoba Libraries in promoting efficient workflows and staff communication. Alma Analytics reports and widgets are easy to create and make available on staff home pages and dashboards. Widgets place frequently-used reports on the staff desktops. Dashboards provide librarians with a collection of frequently used reports with prompts to allow them to refresh the results based on their own criteria at the time of need. Analytics offers a broad range of criteria to construct new reports with flexibility and customization of the analysis.

## How we do our work

According to Emma Hill-Kepron, former head of systems at the University of Manitoba Libraries, Alma has been built in a way that supports the way libraries work. The system tries to anticipate and enable modern, efficient workflows. Alma is designed to make work more automated and streamlined, less manual. The library staff are now able to think about how they do their work and consider ways to be better at what they do. There are fewer barriers to being imaginative, and they can open their minds to new possibilities thanks to Alma.

