



Boston College

Boston College (BC) is a private, Jesuit, research-intensive university with three campuses and a student enrollment of 14,100 undergraduate and graduate students. The University has schools of Law, Business, Education, Nursing, Social Work, and Theology and Ministry. The BC Libraries include 7 libraries with a total staff of 150. The Libraries are members of the Association of Research Libraries (ARL) and hold collections of 2.9 million volumes. Previous ILS/Systems: Ex Libris Aleph, SFX, MetaLib

Summary of Institutional Benefits:

- Alma fosters staff development and decision-making
- Integrated electronic-resource management enables timely access for users
- Alma in the Cloud transforms the library systems department
- Analytics and streamlined workflows support collection projects and enhance productivity

Moving to Alma

The Boston College Libraries have a culture and history of exploring cutting edge technologies to improve library services. As long-time Ex Libris customers, the Libraries were early adopters of Aleph, Primo, and SFX. While not actively pursuing a new library management system, the library systems staff were spending time and effort maintaining a home-grown electronic resource management (ERM) database on an obsolete platform. The distribution and duplication of data among the multiple systems used to manage e-resources was labor-intensive, and financial information about e-resource purchases was scattered and inconsistent. BC was using customized external products for reporting, and systems staff needed to create all desired reports for staff and administrators.

The opportunity to collaborate with Ex Libris and other libraries as an Alma Development Partner allowed BC to continue its pattern of innovation while rethinking how to move the

Libraries into the networked campus and community of users. Using a cloud solution, the Systems Department staff could move away from time spent on server and database maintenance, applying upgrades and patches, and supporting staff clients. The Libraries could embed their systems and services into the university's web environment and develop new, customized services for users. Alma promised streamlined workflows and integrated management of electronic, print, and digital resources, along with sophisticated reporting via Analytics.

Impact of Alma

Staff Development and Collaboration

The Boston College Libraries have taken advantage of Alma's task-based roles and workflows to foster a culture of collaboration and staff development. The permissions



“Alma was the catalyst for team-building and staff empowerment”

Kate Benning, Monographic Acquisitions Librarian

assigned to various roles in Alma have allowed departments to examine how work is distributed, leading to more efficiency. There is enough granularity in roles for managers to give support staff access to new functions, training them to improve their skills, and allowing them to take on tasks previously limited to professional staff. In this way, Alma has supported staff development and enabled a sense of empowerment for staff when they take on new responsibilities and can see how their work fits into the big picture. In the Resource Acquisitions and Management Department, all staff are in working groups devoted to training and developing best practices in Alma. Shared documentation developed by the groups encourages consistent day-to-day practice. Alma has been the catalyst for team-building and staff development.

According to Kate Benning, Monographic Acquisitions Librarian, Alma has both necessitated and facilitated collaboration among departments and libraries at BC to a much greater degree than previously. Library staff understand that the work they do in one place affects what happens someplace else. Now when staff are thinking about proposing a change of policy or procedure, they consider who else might be affected downstream in the workflow. These efforts lead to frequent consultation among staff and break down silos between departments.

Alma has also contributed to streamlined workflows and productivity improvement. For example, staff have mastered batch-receiving of monographic print material. What would have taken hours previously for a large

shipment of books from an approval plan takes minutes now. Alma import profiles and record loading functionality are easy to create and are flexible to support various loading scenarios. Metadata department staff set up the profiles, write the normalization rules, load the records when automated loading is not possible, review the reports, and reload the files if needed. Alma record loading processes save staff time but they also provide important service benefits to public services staff, bibliographers, and library users. The status of newly ordered and received materials is current and available, and bibliographers can immediately see updates in the balances of the funds they manage.

Integrated Electronic Resource Management

The integrated management of electronic resources in Alma has provided many benefits to the Boston College Libraries. Instead of spending time manually updating and syncing data housed in multiple separate systems, library staff benefit from having all the necessary components for effective management as part of one system. Amy Dittman, Electronic Resources Librarian, appreciates that the Central Knowledge Base (CKB) is an integral part of Alma, making it possible to provide centralized access to all information relevant to a specific e-resource. Staff can manage resources at the higher collection level and all shared information will populate down to the specific titles. Everything is connected and tied together. For example, the integration of Elsevier titles in the Community Zone (CZ) provides one collection of Elsevier journals to manage, with updates every week to keep the



library-specific holdings current. E-book records can be batch loaded and grouped into local collections for easier ongoing management, then shared with other libraries in the CZ. Access or other types of notes can be maintained at the collection level, and populate every e-book title in the collection. License terms for e-reserves can be displayed in Primo for users to see. The electronic resources staff have learned to take advantage of Alma's functionality to provide good customer service to bibliographers and reference desk staff, enhancing their ability to offer good public service to library users.



Alma in the Cloud, Transforming the Libraries Systems Department

The Systems Department at the BC Libraries has transformed itself as an outcome of Alma in the Cloud. In the past, library systems staff spent significant time installing service packs and upgrades, editing Aleph tables, and performing Oracle maintenance. Margaret Briand Wolfe, Systems Librarian, used to work during holidays and weekends on projects such as installing service packs or database re-indexing, since it was necessary to shut the system down for the hours required to complete these processes. Aleph was a powerful system, but it required a lot of time and skill for systems staff. Alma is significantly easier to configure and maintain. As a result, the Libraries are less reliant on the university's IT department to schedule and run major processes and monitor servers, and the library staff are less dependent on the systems staff to help with configuration and reporting. This frees up systems

department resources for other core library projects. Library systems staff are building a data warehouse and developing reports for non-Alma applications, with a special emphasis on assessment. Systems staff are supporting Primo, and embedding library course reserves into Canvas, the university's Learning Management System, which results in a more integrated experience for users. Margaret is working with various scripting tools to take advantage of the power of Alma APIs. Newer areas of interest for the department include investigating the potential of linked data, and providing ongoing support for digital projects, with plans to work in the future on open source development and consortial initiatives.

An additional area where the advantage of Alma is clear and systems staff effort is no longer required, is the end of year fiscal rollover. Instead of systems staff spending days over a weekend backing up tables and requiring that staff freeze activities in acquisitions, now the entire process takes just a couple of hours and can be handled by staff in the Resource Acquisition and Management Department on a day and time of their choosing.

Alma Analytics

In the past, Boston College had developed home-grown reporting systems, which required systems staff programming and outside support. Margaret Briand Wolfe states that Alma Analytics, using Oracle OBIEE as the back-end, is an incredibly powerful tool. She can create most of reports staff need, and Ex Libris is continuing to add more data elements. She loves working in Analytics, finding it easy



to build the reports that staff request. Margaret has also trained staff to create their own reports. This is another example of Alma empowering staff; they can't hurt anything by experimenting in Analytics, and they gain valuable expertise and an understanding of the structure of the data in Alma. Margaret puts the reports up on the dashboards. Library staff can subscribe to scheduled reports, which are run at desired frequencies, and they can also export results to Excel to manipulate later. BC staff comment that Alma Analytics is a fantastic tool.



Patron-Facing Services

The Access Services Department at the O'Neill Library makes heavy use of Alma set creation and batch processing capabilities to manage the ongoing transfer of materials to offsite locations and for weeding activities. Staff generate reports with various data elements to identify materials that meet the library's transfer policy, identify duplicate copies, and deselect materials that meet institutional criteria. BC developed a system for performing an inventory and resolving subsequent issues using various Alma processes. Staff generated a set of items in a range of Library of Congress call numbers and assigned them to a temporary location. They then scanned the barcodes of items in the stacks in that call number range and matched those against the temporary location. In this way staff could identify items missing from the shelf, books that had barcodes but no item records, and materials not in the catalog at all. The missing items were deleted in a batch process, and the list of deleted items was passed on to the

bibliographers to evaluate for possible re-ordering. The bibliographers could run reports in their selection area to see circulation statistics to help inform their replacement decisions.

Connie Strittmatter, Head of Access Services and Collection Maintenance, stated that the Department uses the batch change functionality frequently. For example, staff have uploaded a list of barcodes to Alma for materials that were accidentally moved to an offsite location with incorrect circulation policies and were able to correct them in a batch process. Staff feel confident that if an error is made or an outcome of a process is not as predicted, they can quickly locate the records and apply a fix without having to retrieve the physical materials for manual correction.

In Alma it is easy to set up guest patron records, and BC was able to automate proxy borrowers, a significant improvement over their previous system using paper cards.

Confidence in Alma

As the first library to go live on Alma, Boston College has seen the evolution of the system as it continues to introduce new features and functionality. At the same time, the staff at the BC Libraries have grown more confident in their understanding of Alma, experimenting with new approaches that take advantage of Alma's flexibility and automated processes. Alma has stimulated creative problem-solving and collaboration.