Integrated Workflows, Integrated Environment:
How Unified Resource Management can help the library automate and optimize its workflows

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Introduction

Libraries are constantly under pressure to provide more and more services, often in conjunction with similar or reduced staff size and thinly-stretched budgets. Even small inefficiencies in workflows can result in large amounts of time (and money) when compounded on a larger scale. Much of the inefficiency in legacy library environments comes as a result of having multiple systems where staff manage different types of resources or functions. Moving to a Unified Resource Management (URM) solution such as Ex Libris Alma has greatly improved efficiencies in workflows at universities worldwide, allowing them to automate convoluted processes, gain deeper insights from data analytics, and more.

The University of Windsor has found that integrating their disparate systems into one (Alma) has resulted in improved and integrated workflows for all types of resource management, especially in areas of acquisitions, e-resource management and collection and usage analysis.
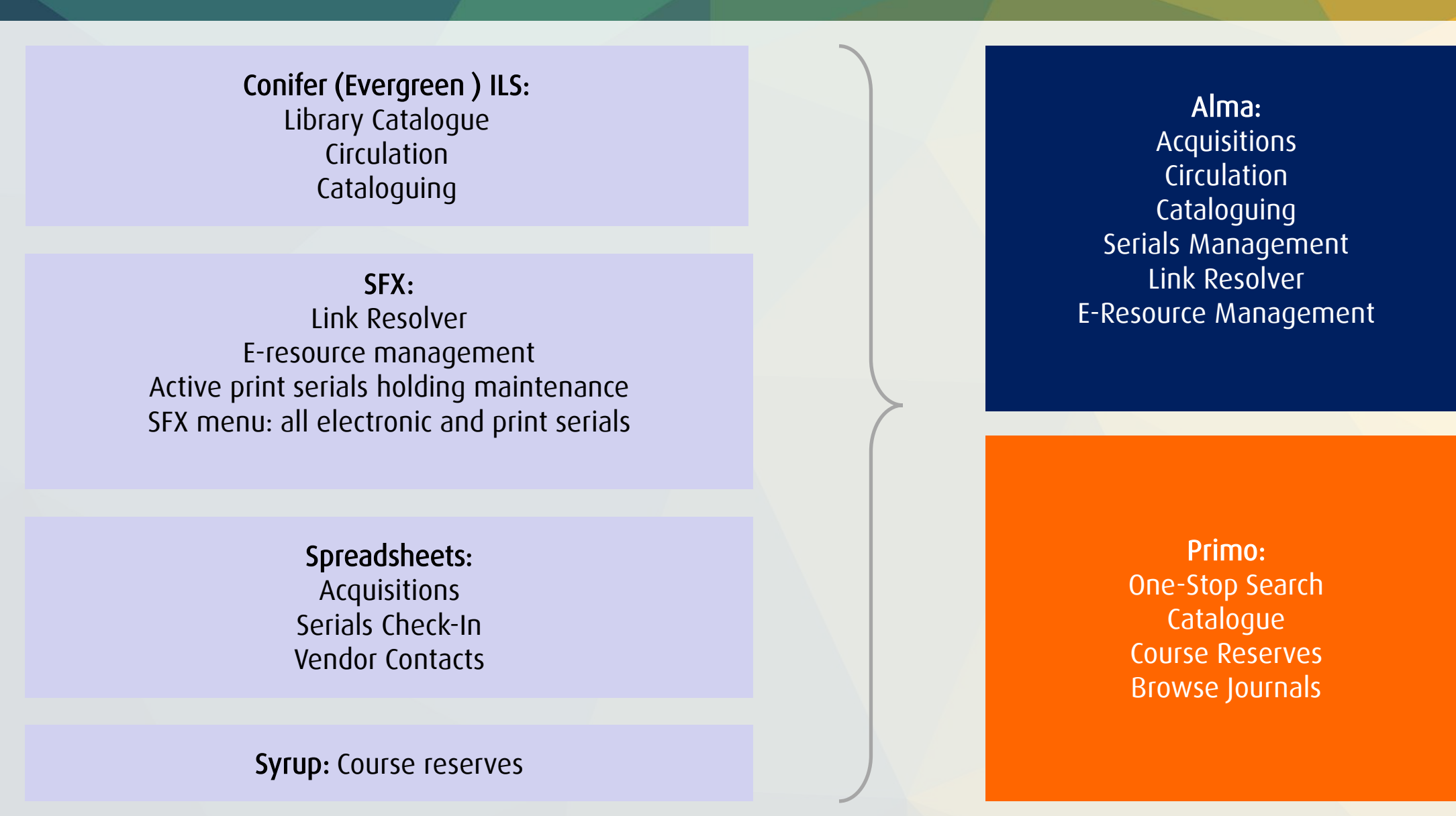
The University of Windsor has over 16,000 students enrolled and offers 190 undergraduates programs, 65 graduate programs and six professional programs. The Leddy Library is the main library, with a collection of over 3 millions items including in excess of 1 million electronic titles and data sets. The library staff consists of 68 staff and 16 student employees, as well as 8 systems staff and 15 IT student consultants.

Legacy Environment

Before moving to Alma, the University of Windsor library had been using a combination of different library management systems and tools, including Conifer (Evergreen) ILS, SFX Link Resolver, and various spreadsheets for acquisitions, serials check-in, vendor contacts, and more. We were also using the Syrup course reserve system. The library was looking for a new solution for a number of reasons, including:

- Issues with legacy systems and the general need to maintain various separate systems.
- Problems the backend workflows, including e-resources management, acquisitions, serials management, usage statistics.
- Budget restrictions. The budget was cut, there was less staff, and Conifer was demanding more resources for daily maintenance. Not having integrated workflows and the cost to maintain and work with separate systems was adding up.
- User expectations. More and more users were looking for a one stop search interface.

When the library went live with Alma and Primo in May of 2014, all of these separate systems were replaced by the unified solution. Alma is used to manage most of the backend staff workflows and Primo is the public facing discovery layer.

Conifer (Evergreen) ILS:
Library Catalogue
Circulation
Cataloguing

SFX:
Link Resolver
E-resource management
Active print serials holding maintenance
SFX menu: all electronic and print serials

Spreadsheets:
Acquisitions
Serials Check-In
Vendor Contacts

Syrup: Course reserves

Alma:
Acquisitions
Circulation
Cataloguing
Serials Management
Link Resolver
E-Resource Management

Primo:
One-Stop Search
Catalogue
Course Reserves
Browse Journals

Integrated Workflows

- ### Streamline Acquisitions Workflows

  Previously Windsor had been managing much of the acquisitions work using various spreadsheets, including spreadsheets for vendor contacts and serials check in. The work was manual and required a lot of double entering of data. Having the Alma acquisitions module to support end-to-end acquisition processes for all types of resources (print and electronic) allowed us to simplify the workflows and easily manage orders, claims, receiving, activation of electronic resources, invoices, vendors and vendor accounts, as well as ledgers and funds all in one system. Much of the work involved in these processes has been automated, cutting down on a lot of the inefficiencies we had before. Additionally, Alma has allowed us to integrate with the campus financial system, which had before been a manual process in the acquisitions workflow.

- ### Manage Electronic Resources

  Using a URM means that much of the functionality for e-resource management uses the same workflows as for physical resource management, allowing for consistent training and management. Previously, Windsor had been relying heavily on SFX for all aspects of e-resource management, beyond the functionality it was designed to support. This resulted in security issues and functional problems, and a lot of extra work was involved in trying to make the system work for us. With Alma, not only can we manage the entire e-resource life cycle in one place, but it is completely integrated with our print resources so there is no need for separate workflows to check information or store information for print and electronic resources.

- ### Reporting and Analysis

  Having all types of resources managed in one place is helpful in areas of usage data and collection analysis. Previously, we had to go to different places/systems in order to collect usage data for different types of resources or databases, then integrate this information using Excel or other tools. This was a complicated and time consuming process, and resulted in a lot of inaccurate data. Now we can use Alma Analytics to get usage data for all formats in one place, and can easily compile and compare print and electronic usage.

  We have also noticed great efficiencies in terms of collection analysis. It is helpful to be able to find all types of collection information in one place, including print and electronic. Previously we had to go to various places to find a title and determine the availability before we could make a purchase decision. Now most of the time we only need to check one system and can easily see what the library owns, whether it is available, and how frequently it is used.

Conclusions

The library has realized many benefits since implementing a unified resource management solution. Having a URM where all resource types and workflows are integrated into one system really has resulted in great efficiencies for library staff. The ability to manage both print and electronic resources in one system has streamlined a lot of manual and duplicated work. As outlined here, we have significantly Improved backend staff workflows and analysis, with great efficiencies gained from integrated workflows in e-resource management, serials management, and acquisitions, and also more efficient collection analysis and usage analysis. Additional benefits of our move to Alma and Primo include:

- One-stop search interface for patrons
- Simpler system architecture
- Better integration with campus system, such as the student information system, finance system, course management system, authentication, etc.

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