



***Viajando al futuro: qué significó
para la Sheffield Hallam University
dejar atrás Millenium***

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ExLibris[®]
a ProQuest Company

About me

- Since February 2016 – Solution Expert Ex Libris EMEA
- 2012-2016 – Library Systems Manager Sheffield Hallam University



**Sheffield
Hallam
University**

About Sheffield

Sheffield is a city and metropolitan borough in South Yorkshire, England

The population of the City of Sheffield is 563,749 - one of the eight largest regional English cities

Famous for steel industry

Now a major student city with 2 large universities – 65,000 students

Home to the world's oldest football club! (and 2 others)



About Sheffield Hallam University

- Based on two sites; City Campus is located in the city centre and Collegiate Campus about two miles away, in south-west Sheffield.
- Sixth largest university in the UK (out of 165) with
 - 31,530 students (of whom 4,400 are international students)
 - 4,494 staff



**Sheffield
Hallam
University**



About SHU Library

- **24/7/365**
- 541,381 books
- 159,304 ebooks
- 35,781 video/audio
- 50,591 electronic journals
- 4245 print journals
- Issues and renewals: 1,387,988

- **90%+ self issue**



Before Alma

Millennium since 1999 – built around print workflows and no longer developing

Summon since 2010 – mostly happy but issues around data updating

360 Link

360 Resource Manager AND Millennium ERM – really using neither

Talis Aspire for reading/resource lists since 2012



Before Alma - Millennium

- Had served SHU well but built around print workflows and no longer developing
- Shift to electronic, slowing print circulation
- Did not meet needs for electronic resource management or discovery
- Integration with Summon a headache
- Cost of integrations
- Cost of add-ons e.g. SIP2 licenses
- Reliance on university IT to manage server, make changes
- Reporting required systems team



What we wanted

- **Management of all resource types in one place**
- **Discovery integrated with resource management**
- **Simplified integration with university systems**
- **Less reliance on university IT**
- **Empowerment of library staff, e.g. reporting**
- **Analytics – data-driven decision making**
- **Simplify – streamline processes, simplify and improve circulation policies**
- **Sympathetic supplier understanding of UK HE changing landscape**



What end users wanted

- To get the resource they want, regardless of format
- Single interface for discovery, link resolver, delivery, library account



Business case

- **Research the marketplace**
- **Align with University strategy**
- **Use University language**



Review of systems marketplace

- Investigate whether a good time to procure a new system
- Review of literature, visits to libraries and system demonstrations from 8 vendors
- Discovery evaluation - looked at leading discovery systems in tandem with library management systems/library services platforms

Tender published spring 2014

Based on a combination of LMS core specification and LibtechRFP's next-generation system spec with some of our own requirements

Submissions from 7 vendors! A lot of reading for the project team

<https://libtechrfp.wikispaces.com/UKCS+Download>
<https://libtechrfp.wikispaces.com/Library+Services+Platform>

Selection process



- Scoring tenders

- Made a mistake to rely so much on the ageing core spec – many vendors could answer ‘Y’ to most requirements while not being really next-gen.

- Chose Alma...what were our reasons?

- Met with our requirements
- –truly next-generation and offered more potential for future development



Why Alma?



Why Alma?

Futureproof[™]

Why Alma?

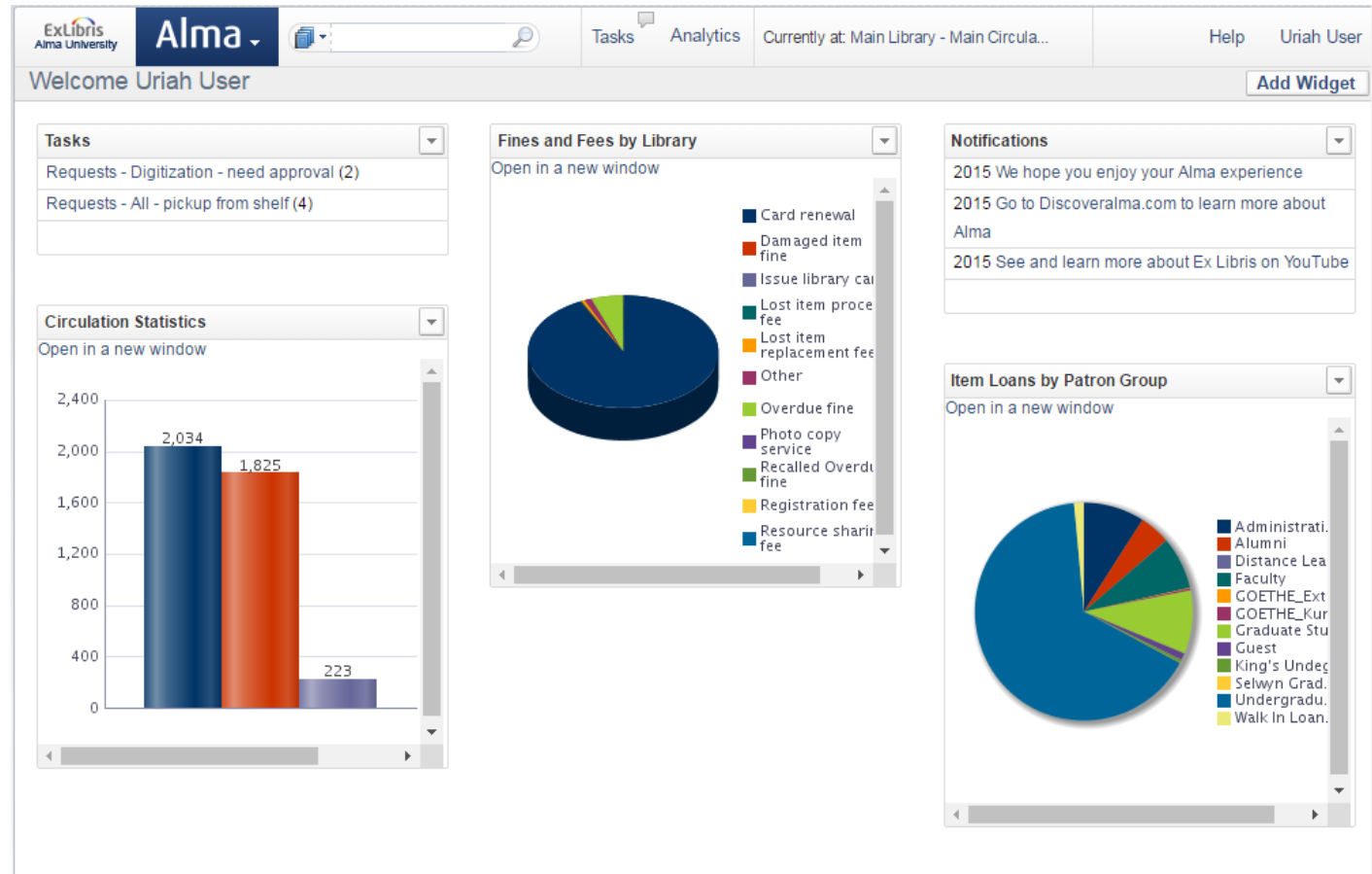
- Task orientated with exception-based workflow engines

The screenshot displays the Alma user interface for Andrew Christison. The top navigation bar includes the ExLibris logo, the Alma brand name, a search bar, and navigation links for Tasks, Analytics, and Help. The main content area is divided into several sections:

- Tasks:** A list of tasks with counts, including "Requests - Digitization - need approval (2)", "Purchase requests - unassigned (28)", and "Orders - review (210)". This section is circled in red.
- Notifications:** A list of messages, such as "2015 We hope you enjoy your Alma experience" and "2015 Go to Discoveralma.com to learn more about Alma".
- Item Loans by Patron Group:** A pie chart showing the distribution of item loans across different patron groups, with a legend for "Administrati.", "Alumni", "Distance Lea", "Faculty", and "COETHE Ext".
- Cataloger Activity:** A 3D bar chart showing activity for "Record was Created", "Record was Deleted", and "Record was Updated" across categories "System", "annaa", "cat", and "exec".

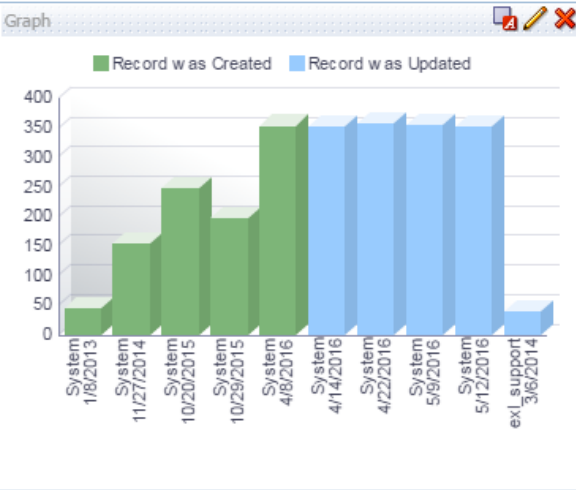
Why Alma?

- Personalised Dashboards



Why Alma?

- Analytics



Ex Libris Alma University | Welcome Abby Atkins | Tasks | Analytics | Currency at: None | Help | Abby Atkins | Add Widget

Tasks

- Purchase requests - unassigned (28)
- Invoices - approval - without assignment (33)
- Invoices - review - without assignment (1)
- Order Lines in evaluation - analysis (16)
- Order Lines in evaluation - draft (8)
- Order Lines in evaluation - requested (4)

Notifications

- 2015 We hope you enjoy your Alma experience
- 2015 Go to Discoveralma.com to learn more about Alma
- 2015 See and learn more about Ex Libris on YouTube

Expenditure by Classification

Open in a new window

Classification	2012	2013	2014	2015
Agriculture (General)				200
America	15			50
American literature	20		50	642
Animal culture			12	
Anthropology				75
Archaeology				277
Architecture		254	65	20
Arts in general			13	6
Astronomy	10		120	35
Astronomy - Astrophysics				35
(General)	10		120	
Biology (General)			1,860	1,008
Book industries and trade				22
Books (General) - Writing				20
Philosophy				
Botany				5

Top 10 E-Journal Usage

Open in a new window

Top 10 Vendors

Open in a new window

Annual Trend | Classifications | Vendors | Acquisition Method | Material Type | Reporting Code | Fund Ledgers | Detailed Expenditures

Year: --Select Value-- | Apply | Reset

Expenditures Dashboard: Current Year - Transaction Type

- [Classification](#)
- [Vendor](#)
- [Acquisition Method](#)
- [Material Type](#)
- [Reporting Code](#)
- [Fund Ledgers](#)
- [Detailed Expenditures](#)

Refresh | Print | Export

Expenditure: 4,100
Remaining Allocation: 2,432,156
Encumbrance: 267,210

Expenditures - Annual Trend

Refresh | Print | Export

Why Alma?

- Full discovery integration



Why Alma?

- Ex Libris reputation
- User community



Implementation process

- Contract Award end 2014
- Kick-off Feb 2015 - go-live 6 July 2015
- Speedy and intensive, but Ex Libris team had the process perfected!



What we achieved early on

- Reduction in number of systems
- Empowerment of staff
- Flexibility – on any device, take anywhere
- Ease of configuration
- Library control (from IT)
- Premium sandbox
- No paid addons eg SIP2 licenses
- Streamlining workflows, reconfiguring teams

- Cost savings!

- Sharing reports – e.g. SCONUL reports

- Integrations
 - EDI supplier integrations, EOD, EDI invoices,
 - Coutts OASIS
 - WPM online payments
 - Selfchecks – just worked
 - SMS
 - EZProxy



What we achieved early on

- Mature but developing system
- NERS
- Ideas Exchange
- Developer Network
- Circulation/Fulfillment: lot less fines, simplified loan policies, automatic renewals
- Loading MARC records automatically by schedule
- Mass updates to records
- Community zone – integration with proQuest KB coming
- Alma Community – mailing list, user groups



The best is yet to come!

- Monthly releases
- Built for the future





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