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Back to the Future: Changing LMS after 24 years

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University of Exeter Library



Agenda

- Exeter Context
- “Millennium Mindset”
- Migration
- Testing
- Training
- Rapido and Rialto
- Lessons Learnt and Next Steps





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- Russell Group University in the South-West of England
- 30,000 students and 7,000 staff across three campuses plus Knowledge Spa in Truro, Cornwall
- Penryn Campus in Cornwall shared with Falmouth University and already using Alma/Primo

The Library

- Using Millennium LMS since 1999
- Onboarding with Ex Libris began January 2022
- One year delay due to IT resourcing
- Went live with Alma, Primo, Rapido and Rialto July/August 2023



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“Millennium Mindset”

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SKIP	0	E
LOCATION	main Forum Library	M

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ISBN/ISSN	020	9781408712245 q(hardback)
ISBN/ISSN	020	9781408712238 q(paperback)
ISBN/ISSN	020	1408712245 q(hardback)
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AUTHOR	100 1	Harford, Tim, d1973- eauthor.
TITLE	245 1 0	How to make the world add up cTim Harford.
ADD TITLE	246 3 8	How to make the world add up : bten rules for thinking di
IMPRINT	264 1	London : bThe Bridge Street Press, c[2020]
IMPRINT	264 4	c©2020
DESCRIPT	300	338 pages ; c25 cm
DESCRIPT	336	text 2rdacontent
DESCRIPT	337	unmediated 2rdamedia
DESCRIPT	338	volume 2rdacarrier
NOTE	500	Published in the USA by Riverhead Books, 2021 as: "The
NOTE	504	Includes bibliographical references and index.
SUBJECT	650 0	Statistics xMethodology.
SUBJECT	650 0	Social sciences xStatistical methods.
SUBJECT	650 0	Statistics.

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Hello,
According to our records you have the
loan(s).
Please return or renew your loan(s) as
Current members can renew their loans
<https://encore.exeter.ac.uk/iii/encore>
If you have any problems, please get i
Email: library@exeter.ac.uk
With thanks from the library team

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AUTHOR	Harford, Tim, 1973- author.
TITLE	How to make the world add up / Tim Harford.
ISBN/ISSN	9781408712245 (hardback)
ISBN/ISSN	9781408712238 (paperback)
ISBN/ISSN	1408712245 (hardback)
ISBN/ISSN	1408712237 (paperback)
LOCATIONS	main

Summary	Record i29999583	0 Item-Level Holds	0 Bib-Level H
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i29999583 Last Updated: 18-07-2023 Created: 16-04-202

COPY #	1
ICODE1	0
ICODE2	
I TYPE	100 Standard loan
PRICE	£0.00
OUT DATE	18-07-2023 03:52PM
OUT LOC	0
DUE DATE	17-07-2024
PATRON#	1218775
LPATRON	1218775

CLASSMARK	961	519.5 kHAR
BARCODE		3214860392

Migration

- Migration of just over 1.5 million bibliographic records
- Just over 50,000 user accounts
- Order records historic and active including invoice information
- Bill Douglas Cinema Museum (XML)
- Penryn Campus (Deep Search)
- ORE Open Research Exeter Repository OAI-PMH

- Mostly successful lots of lessons learned from test load.
 - Checkins for electronic resources
 - Print to Electronic



- Organised into Alma functionality – Acquisitions, Resource Management, Fulfilment, ILL, Discovery
- Spreadsheet testing logs: to refine tasks, log errors, link to articles/training videos
- Many ideas relegated to the mythical ‘post go-live’ future
- Tried to involve all staff, different levels of take up, moderately chaotic overall

Task
Ordering
Configure Reporting Codes
Import bibliographic record for print order - search reso
Import bibliographic record for e-book order - communi
One-time print order - adding/editing item record, addi
One-time e-book order
One-time DVD order
One-time Electronic Collection order
Edit an order e.g. change number of copies, price, ISBN

Switch an order	posed	major	No library sites/pickup
Order now	posed	medium	Recalled Items set is It
Order addition:	waiting retest	medium	Reading room: could n
	waiting retest	medium	annual block didn't stc
	posed	cosmetic	uni logo is massive on
	posed	cosmetic	hide 'terms of use' fro
	ew	cosmetic	change Undergraduate
	en	major	Resource sharing form
	posed	medium	
	waiting retest	major	
	jected	medium	
	posed	medium	

Task
Borrow
Can items be loaned and returned at the circulation desk
Can items be loaned and returned at the self-check machines - and reflect in Alma
Can reference-only items not be borrowed
Do non-borrowing user groups get blocked from borrowing
Are loan periods as expected
Do loan due dates not exceed patron expiry date
Do equipment loans have the right expiry date
Mark a loan as Claimed return
Can you register an in-house use e.g. thesis on patron account when at reading room desk

Testing

Training Timeline

January-March

- Getting to Know Alma
- Getting to Know Primo

May-June

- Sets and Jobs
- Ex Libris Workshop
- Front Line and Enquiries
- Letters
- Analytics

July-August

- 1:1s with frontline team
- Print Circulation
- ILL – Borrowing
- Ordering with Rialto and RTO
- ILL – Lending

Training

Library staff trainer role funded by the LMS project

- Online/in-person sessions based on Ex Libris Knowledge Centre and training videos – with an Exeter twist
- Signposting to Ex Libris training resources
- 1:1s, small groups, large groups
- Slides, demos, screen recordings with voiceover
- Ex Libris Workshop
- Frontline team – matrix-managed – master doc

Challenges

Time, terminology, digital shift, change fatigue, communications



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Rapido and Rialto

- Rapido
 - We may have taken on a bit too much implementing alongside Alma/Primo
 - Lots of last minute/post go-live adjustments needed to get Primo back where we wanted it
 - Clearly very powerful and already receiving positive feedback from users
- Rialto is amazing!
 - Staff really seem to like it
 - Setup straight forward
 - Looking forward to using more of its features
 - Currently just ordering like mad for the new year!



Lessons learned

- Communications
- Change fatigue
- Needed more Library staff involved sooner
- Duplication of electronic resources
- Lots of tidying tasks to do
- User API integration
- Implementing too many new services at once!
 - Rapido
 - Rialto

Next steps

- A lot!
- Workflows and policies
- Metadata tidying
- Automating processes
- Embedding practice
- Exploring integrations with our other systems and services e.g. Springshare , LibKey



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Thank you for listening.
Any questions?

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