

Back to the Future: Changing LMS after 24 years

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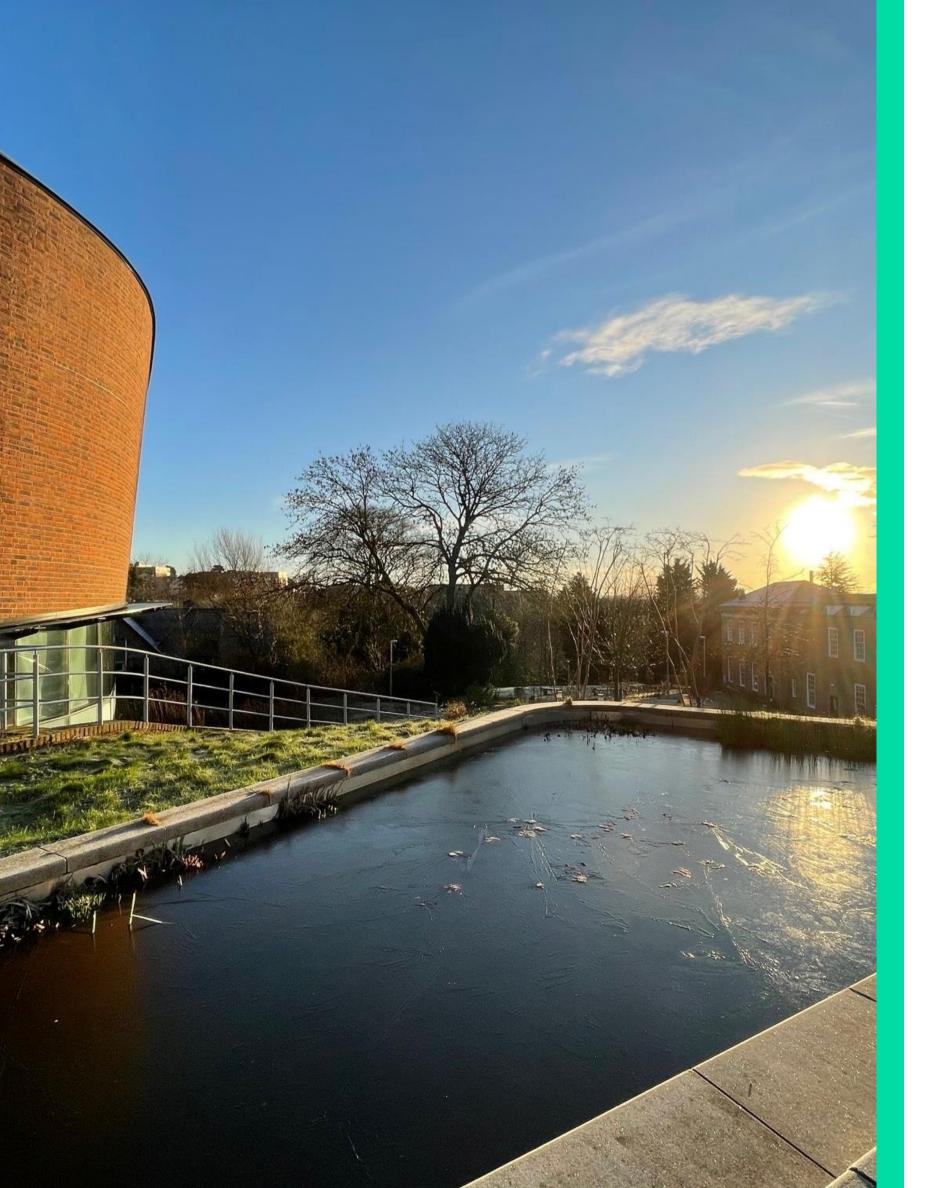




Agenda

- •Exeter Context
- "Millennium Mindset"
- Migration
- •Testing
- Training
- Rapido and Rialto
- Lessons Learnt and Next Steps





University of Exeter

- England

The Library

- July/August 2023

• Russell Group University in the South-West of

• 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

• 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





"Millennium Mindset"

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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 ulletof take up, moderately chaotic overall

Task			-		
Ordering			Testing		
Configure Rep	porting Codes				
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			Borrow		
	jected		Can items be loaned and returned at the circulation desk		
	bsed		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		

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 \bullet 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
- \bullet
- Frontline team matrix-managed master doc \bullet

Challenges Time, terminology, digital shift, change fatigue, communications

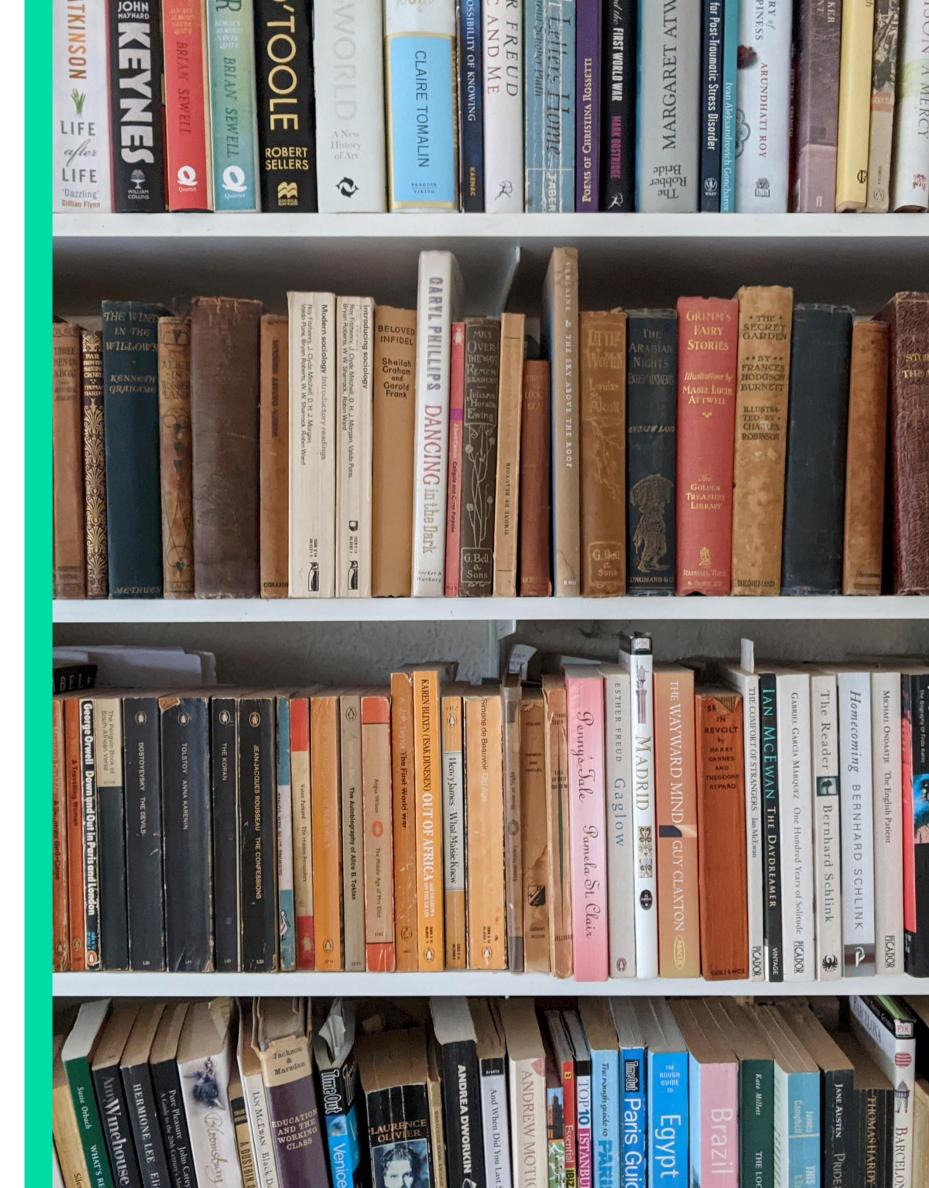




Rapido and Rialto

• 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





Thank you for listening. Any questions?

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