Uncomfortable— Committing to Change— Finding Success

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Introduction

- **Moving to a new discovery layer**

- **Impact on STAFFING**

- **Impact on WORKFLOW**

- **Achieving change to a newly created system**

University of Texas at Dallas

- Began life as a think tank for Texas Instruments and became a part of the University of Texas System in 1969
- Added juniors and seniors in 1975; added freshmen in 1990

- Enrollment over 23,000 for Fall 2015, 135 degree programs
- 38% of enrollment by graduate students (30 PhD programs)
- Over $42 million awarded in research grants (2014)

- Ranked 16th in universities under 50 years old (Times Higher Education).
- Ranked 34th in Value for Public Colleges by Kiplinger's (2015)

Libraries of UT-Dallas (2014)

- **Total volumes 2,541,916**
  - **Includes 1,208,623 electronic items**
    - **Over 70,000 electronic journal titles. Only a few hundred active journal titles are received in paper**

- **Total Discovery Layer searches: 944,227**

- **Total Budget> $9,000,000   approximately $5.8 million for materials**

- **Total Staff 67 plus 14 students**

Moving to a New Discovery Layer

- **Students do not start their library research in databases/systems but rather use Google to find information**

- **One stated reason is that the catalog system was too difficult as compared to Google**

- **Using a variety of methods, the Library Public Catalog Committee learned where the catalog system was FAILING them. Changed jargon and functionality to improve results**

- **Installed Encore, an Innovative product, to create a Google-like approach to finding articles and library resources**

Moving to a New Discovery Layer

- **Encore created a delay in integrating with WebVoyage—the catalog and the discovery layer were products of two different companies. Not a great fit.**

- **In 2013, UTD became an "early adopter" of ALMA—the new product from Ex Libris. Primo was required as the public interface of the system.**

- **Primo was already considered a mature product**

Reasons for the Change

- **Moving to Cloud Computing**
  - **Requires fewer campus resources for equipment and staffing**
  - **BUT updates are not always in live time.**

- **Creating an easier system for students**
  - **Emulate Google features**

- **Easier manipulation of bibliographic records**

Implementation of Primo

- **Assigned a support team at Ex Libris. Had an implementation team in the library**

- **Implementation was difficult and required meeting with developers at Ex Libris (this could be dependent on the size and complexity of the local systems group).**

- **Local group reviewed every aspect of the Primo display. Nearly all aspects of the out-of-the-box display were changed if possible.**

Implementation of ALMA

- **Training: Had months of live webinars based on various aspects of the modules**

- **Hands-on training was complicated by the limited testing space and data included (NOTE: ask for a full test database not a subset)**

- **Individual departments explored the opportunities provided by ALMA. COMMITTING TO CHANGE…**

- **Go live date was mandated by Ex Libris and occurred in the first week of the fall semester. A REAL PROBLEM FOR CIRCULATION AND RESERVES**

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ALMA/Primo Committee

- **Serious implementation concerns voiced by public service departments after Primo went live.**

- **Committee reported over 50 concerns and ranked them in importance for change.   Reviewed ALMA development libraries to explore their Primo displays**

- **Determined what Systems staff could implement**

- **If something was not working as directed, the Systems team would submit a case (called a support incident (SI)) 446 have been submitted to date -- 51 are currently open. Many are sent to "Development"   Monthly updates often caused problems.**

Survey--2015

- **Library staff members were surveyed concerning the implementation (if they had worked in the previous system)**

- **Support of the project was very split**
  - **Technical Services**

    - **Analysis of workflow by Technical Services staff increased their knowledge of the system's capabilities.**

    - **Created a very positive outlook for the system. Training was extensive.**

    - **Could see how large quantities of records could be manipulated over a short period of time.**

Survey (Continued)

- **Support of the project was very split—Public Services**

  - **Timetable for going live at the beginning of the semester. Issues for Circulation**

  - **At Go Live date, the connectivity with Interlibrary Loan and Reserves was not functioning. System was vastly improved by the second month creating more positive feelings for the product.**

  - **Most reference staff surveyed reported that Primo was more difficult to use than WebVoyage.   WebVoyage was not a discovery layer.**

  - **Support for a discovery layer vs. using databases**

Other Developments

- **New elements/services within the library developed in response to ALMA/Primo:**

  - **Expanded Chat service using Zopim Chat**

  - **RAPID (Interlibrary Loan)**

  - **New expanded** LibGuides -- upgraded to version 2.0

  - **Implementing Resource Sharing module within ALMA**
    - **Reduces the amount of staff time creating records in the system (loading data directly from ILLiad)**

Staffing

- **Never underestimate the reaction to change**

- **Value of flexibility, enthusiasm, and commitment**

- **Proof of product vs. Early adopter**

- **Value of the team and the value of training**

- **Working with other libraries and building a support group**

- **Committing to the new system**

Conclusions

- **Change is constant—moving toward SUCCESS**

- **Some elements of a new system benefit other parts of the library more than others. Can be very difficult for some groups to experience the complete benefit**

- **Sometimes it is hard to see better**

- **Building a relationship with the development team of a company is essential**

Questions???

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