Community-Powered Content Management

A Customer Conversation:
The Value of Ex Libris Centralized Content Management

An active member of the Community Zone Management Group (CZMG) speaks to workflow management using Ex Libris centralized Content services and the role of the Ex Libris community in maintaining high quality resources.

Electronic Resources Librarian Elizabeth York had experience with a legacy ILS before moving to Rutgers University. She took the new position shortly after the library implemented Alma and Primo and shares her experiences with managing workflows using shared Content services. As we spoke, her passion for cataloging and content management came through loud and clear.

We'd love to hear your story and your perspective on Content. I guess we could start at the beginning, when you moved to Alma and Primo.

Rutgers moved to Alma and Primo in June 2018, and I started at Rutgers in September 2018. After working as an Electronic Resources Librarian with other ILS's for some years, I was looking for a job at an Alma/Primo library. I was really excited about working with Alma and Primo because I read in Marshall Breeding's Library Technology Guides that Alma was the top-rated ILS for e-resources, with good comments from many libraries about it making it easier to manage e-content.

If you switched jobs because of the ILS, this must be pretty important to you.

With a legacy ILS, to manage content, we purchased the content from the vendor, activated the collections in an external knowledge base like 360 Link, and did monthly batch MARC record loads from the knowledge base into the ILS. Sometimes we had to obtain MARC records directly from the vendors and batch-load them into the ILS. We activated indexing in a separate discovery system, and we recorded administrative information in a separate ERM system. These things weren't connected, and it was hard to keep track of your content. You had to look in all these different places.

What difference has using Alma/Primo made?

There's a great end-to-end e-resource workflow in Alma: we get a new resource, find it in the Alma Community Zone (CZ), place the order on it, and then, once we have access on the vendor side, we can activate it in Alma, test access in Primo, record the administrative information, set up usage statistics harvesting, and complete the end-to-end workflow in Alma. As a new Alma library, we wanted to use Alma for everything. That's why I was so excited.

I love how it's a centralized workflow with everything is one system. I can look at my electronic collection and see the attached order, see the perpetual access status, look at all the portfolios, click "Display in Discovery" and see them in Primo, add an authentication note, add a temporary warning if the database is unavailable, and then remove it once the database is available again. It's much easier to manage the content and troubleshoot errors with everything in one system and CZ updates coming every week.

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Sounds like the Alma CZ is key to this.

The workflow I described depends on having the content you need in the Alma CZ. Really, that's the best way to manage content; it is much more efficient than loading MARC records from all your different vendors. We definitely rely on the CZ and work with Ex Libris to make it as good as it can be. I've been doing this for almost six years, and we've provided feedback and seen some real improvements.

Can you share some examples?

One thing we saw pretty early in our process was better MARC records for Alexander Street collections. When we first moved to Alma, the Alexander Street CZ MARCs were minimal, and sometimes the portfolio link was for a different film entirely! So, instead of using the CZ MARC records, we loaded local MARC records from Alexander Street, but these were intense collections to manage, with record additions and deletions we had to make on a monthly basis. Ex Libris listened to the customers and created a new process whereby they obtain full MARC records straight from ProQuest Alexander Street and load them into the CZ. Now we use the Alexander Street CZ collections, and they are updated automatically, which is a big improvement.

We have also seen Ex Libris build closer working relationships with providers over the past few years. Providers aren't always aware of how their content behaves in the CZ and how it works. Now I often find when I file an Ex Libris Support ticket reporting a problem with CZ content, Ex Libris will reach out to the content provider, copying me so I can see the conversation and help the provider and Ex Libris understand what we need. Recently, Ex Libris announced they will be allowing providers to view their content in Alma, and that is huge as well. That's going to help them understand what can go wrong and the proper file formatting they need to use when they submit their title lists to Ex Libris.

That's part of the upcoming Provider Platform rollout. I think the Community Zone Management Group (CZMG) and the Content Working Group (CWG) played a big part in creating that connection. The advocacy of the working groups allowed us to prove to providers how important these conversations are, and that direct communication is much easier when all parties are communicating in one stream, working in the same direction, and it's as transparent and open as possible.

Recently I was having a conversation with Oxford University Press, and they sent me a screenshot saying, "Well, we looked into Alma, and we see this URL."

That's amazing.

That might be more of a CWG thing whereas I'm on the CZMG. But I'm seeing and hearing bits and pieces of this process playing out and following the notes. More generally, I think we in the CZMG have vocally supported stronger working relationships between Ex Libris and providers, so it's great to see Ex Libris making such substantial progress in this direction.

Ex Libris Content

Ex Libris works closely with Content Providers to manage metadata for the benefit of mutual and potential customers. Supplying shared metadata and convenient linking options, these services lift a large part of the workload off of librarians and streamline the process of adding new content or enriching current metadata to make items more discoverable for end users.

The **Alma Community Zone, SFX Knowledgebase and 360 Knowledgebase** support our cataloging community with centrally maintained, trusted, accurate and high-quality metadata, supplied directly from Content Providers and updated daily.

The **Central Discovery Index (CDI)** powers all Ex Libris Discovery solutions with over 5.26 billion records, generating reliable search results and delivering easy access to full-text content for end users.

So what role does the CZMG play in providing a feedback mechanism to Ex Libris?

I appreciate the opportunity to be on the CZMG, and it's exciting being able to participate in new developments. I appreciate that Ex Libris is taking feedback from customers and applying it. We see Alma and Ex Libris products as continually developing, which is a real distinction for Ex Libris. Alma keeps evolving in response to library needs and changes in the library landscape.

Every now and then Ex Libris calls for new members for various Ex Libris groups, and librarians should definitely think about getting involved. For me, it's been good to build relationships with Ex Libris and have a voice in different Content-related things.

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You're pretty engaged. In what other ways can librarians get involved?

I really advise getting involved on the Ex Libris Listservs [ed. note – community-managed emailing lists monitored by Ex Libris staff]. I'd say Alma, Content and Primo are the core Lists if you work with content. If you have questions, you can ask other libraries on the Listservs, and chances are, somebody else experienced the same situation and will be able to share advice. Ex Libris monitors the lists, so they'll chime in if there's an issue that multiple people are noticing. There are other Ex Libris lists as well, so you might want to sign up for additional lists for the other products you use. There's a real community on the Listservs. Also, it's great to go to your regional user group meeting or to the national ELUNA or IGeLU conferences and learn more from other libraries. You can really learn a lot from the community.

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You use the word "community" a lot. Is that how it feels to you?

Yes, and for me personally, I feel a real difference compared to the previous ILS vendor with which I had worked. The Alma/Primo community is very active, we help each other, and Ex Libris is actively developing Alma/Primo to meet library needs. I was excited to come to Rutgers to work with Alma and Primo, and I still like it. It was totally worth it.

Rutgers, The State University of New Jersey

Rutgers, The State University of New Jersey, stands among America's highest-ranked, most diverse public research universities. Established in 1766, Rutgers is the eighth-oldest higher education institution in the United States, and it is the oldest, largest, and top-ranked public university in the New York/New Jersey metropolitan area, with over 66,000 students and over 8,000 faculty. Rutgers University Libraries are the intellectual center of the university—serving all members of the university community (across 3 campuses in New Brunswick, Newark, and Camden, as well as biomedical and health sciences programs throughout the state), supporting all disciplines, and playing a key role in advancing student learning and faculty research. Rutgers University Libraries operate with a budget of $46 million and have outstanding collections across 11 libraries, including more than six million print and digital resources, over 500 databases, and superior collections in jazz and New Jerseyana.

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Our team of experts looks forward to hearing from you

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