

University of Leeds

Consolidating,
Developing and
Extending Capability



One of the largest universities in the UK turned to Ex Libris for comprehensive, integrated library services capable of handling its complex network of resources.

“Alma has made it possible for us to adapt our services and workflows so that we can operate effectively in an environment that has become increasingly online”

Jane Saunders, Head of Collections Services



About University of Leeds

The University of Leeds, established in 1904, is one of the largest higher education institutions in the UK, renowned globally for the quality of its teaching and research. The University includes seven faculties, covering a very broad range of subjects, and is a member of both the UK-based Russell Group and the Worldwide Universities Network (WUN) of research-intensive institutions. Repeatedly ranked among the top 100 universities in the QS World University Rankings, the University of Leeds has twice been awarded the UK's highest accolade for an academic institution, the Queen's Anniversary prize.

Leeds University Library is one of the major academic research libraries in the UK. It includes four main campus libraries, three of which have subject- and discipline-specific collections, a departmental library for language materials, and a small satellite library based at a partnered teaching hospital. In total, the library collections managed by the University of Leeds include approximately two million records.

Overcoming Limitations

Leeds University Library had been using the same library management system, Sierra, for many years. This was suited for their initial purposes but was becoming increasingly limited and less effective.

E-resources became challenging to manage, as they had developed more rapidly than the system was able to cope with. The workarounds and patches developed by the library staff were untenable for the long term, as they made access and support more difficult. Also, the incompatibility between the main library management system and a separate Special Collections system complicated management workflows and metadata creation.

Another significant issue for the Library was not being able to fully extract and manipulate data using the system's analytics capabilities. The files, queries and reports that could be created were too restricted both in size and complexity.

As the contract with the system vendor was coming to an end, Library leadership saw an opportunity to make a change that would optimise staff activity and be more adaptable to changes in the digital landscape. In addition to improving resource management, there was also an opportunity to review and completely overhaul circulation parameters.



A Solution to Handle Complex Challenges

The University of Leeds issued a call for proposals for a new library management system, following European Union procurement rules. The Library team started by investigating the market and inviting expressions of interest. This was followed by a full tender process for those system providers that had responded. As part of the assessment stage, library decision-makers spoke with current users and even visited some sites where the various solutions are in use, to observe how the systems operate with live data, rather than sample data from vendor demos.

In addition to the need for a coherent system suited to the latest digital technologies, the Library looked for a solution capable of handling the following challenges:

- many categories of external patrons, off-site stores and Special Collections material, all with their own sets of borrowing restrictions
- an in-house classification scheme and reading list system
- a digitised content repository and unique items drawn from external sources
- legacy data catalogued on several separate systems, with different workflows, fields and workarounds developed over time to manage the various resources
- large datasets for acquisitions processing and metadata management, rather than individual records
- preserving information from disjointed systems and normalising it before the data transfer so that it would map into a new system.

In the light of its needs and strategic plans, Leeds University Library selected Ex Libris Alma as its new library services platform, as well as Primo for its discovery services. Drivers behind the decision included the integrated and unified nature of the cloud-based Ex Libris solutions, their configuration flexibility, Alma's analytics capabilities, the active international user groups, and the support of a global leader in the industry with customers of all sizes.

The transition from a familiar legacy system to Alma was successful. This was achieved thanks to careful planning and cross-team collaboration in the library, as well as with the Ex Libris implementation staff. A Library Implementation Team was established and began working closely with colleagues in the University of Leeds IT department. The team also met regularly with Ex Libris personnel, who "were very helpful and

professional, keeping us on track really well and trying things with us as we went along," according to Access and Acquisitions Manager Elly Cope.

As many of the library management processes are interconnected, an array of people needed to be involved from the start, bringing their range of expertise to bear. While this meant a lot of valuable contributions it also entailed complex logistics and training.

New Opportunities

Summarising the impact of the transition to Ex Libris, Elly said, "Alma has given us opportunities to explore new and more effective ways of working, especially over this last challenging year of the global pandemic."

Most significantly, the centralised, coherent and consolidated library management and discovery solutions of Ex Libris have streamlined processes for Leeds University Library. The cloud-based system has also made it possible to maintain greater security and stability, without the expenses associated with on-campus solutions. During the campus closures as a result of the pandemic, remote access for both patrons and librarians took on an even greater importance, unexpectedly becoming an essential benefit of the transition into the cloud.

Alma's analytics capability has vastly improved reporting by providing much more management information, as well as more detailed data and nuanced analysis. Part of the analytical flexibility is the ability to easily combine and integrate information from different areas of activity. The library team can now retrieve accurate information for improved decision-making and to highlight the value of library activities.

"Make use of the community," Elly advises new Alma customers, noting another aspect of the shift to Ex Libris that has had a significant impact on Leeds University Library. "The user groups are absolutely brilliant to be a part of – IGeLU (International Group of Ex Libris Users) and EPUG-UKI (The Ex Libris Products User Group, UK and Ireland) both put on great events and are a great route in for the community to get concerns and potential improvements on the agenda."

The library team have adapted quickly to Alma as their new library management system. They are looking forward to making fuller use of the system's functionality.

About Ex Libris

Ex Libris, a ProQuest company, is a leading global provider of cloud-based solutions that enable institutions and their users to create, manage, and share knowledge. In close collaboration with its customers and the broader community, Ex Libris develops solutions that increase library productivity, maximize the impact of research activities, enhance teaching and learning, and drive student mobile engagement. Ex Libris serves over 7,500 customers in 90 countries. For more information, see our [website](#) and join us on [LinkedIn](#), [YouTube](#), [Facebook](#), and [Twitter](#).

