



Moving Libraries Forward: A Unified Approach to Transforming Libraries and Making Everyone Happier

By pairing Alma cloud-based library management services with Primo search and discovery solutions from Ex Libris, these libraries – and thousands of others around the world – are transforming library experiences for the librarians and users of today, and reinventing themselves for tomorrow.

Today's libraries are increasingly challenged by the need to expand their services and content offerings while making the most of shrinking budgets and staff size.

Lisa Janicke Hinchcliffe of University of Illinois at Urbana-Champaign noted in her 2022 commentary for Physics Today that **scholarly output continues to grow while library budgets have declined by 62%**¹. "The collections budget cuts further exacerbate the challenges libraries face as scholarly output continues to grow while library budgets shrink," she observed.

In an interview on library staffing trends, Mary Jane Petrowski, associate director at the Association of College and Research Libraries, shared with Inside Higher Education that since 2012, **full-time academic library staffing has gone down by nearly 20%**².

Meanwhile, library collection development and catalog management, content exposure and accessibility have all grown in volume and complexity. Some libraries are struggling to address their challenges and adapt, however, as legacy approaches often require multiple, disparate systems for resource management; of print, electronic and digital resources, and their discovery. **These systems often don't work well together, resulting in many tasks requiring manual intervention, duplicated efforts, vulnerabilities in data security, and missed opportunities to maximize library usage.** Libraries no longer have the necessary staff or budget flexibility to effectively work around these obstacles.

At Ex Libris, part of Clarivate, collaborating with libraries to meet their needs is foundational to the development and enrichment of all services. We work closely with our user communities to understand the depth of their challenges and to develop forward thinking solutions that not only meet the needs of today's libraries and the communities they support, but also anticipate the evolving needs of tomorrow's libraries and the students, researchers, and faculty members who depend on them.

We frequently hear from customers like **Dr. Brandon A. Owens, Sr., Dean of the Library at Fisk University**, who explained during a recent conversation, "I saw a glaring need for a new library system that would make electronic resources both visible and searchable with the library catalog."³

“We were really looking for a unified system so we could get away from having separate knowledge bases and from having to maintain our services on different platforms with different software.”

Molly Beisler, Director of Collections and Discovery at the University of Nevada-Reno

Fisk University’s Franklin Library transitioned to Alma & Primo for unified and centralized management of print, digital and electronic resources and moving away from multiple, disparate services. This upgrade made it possible for students and researchers to explore multiple databases at once, and to surface all relevant resources, related topics and different disciplinary perspectives, while library staff had a single platform to learn and master for day-to-day library activities.

Likewise, Molly Beisler, Director of Collections and Discovery at the University of Nevada-Reno, shared during a recent interview that the institution’s library “was really looking for a unified system so we could get away from having separate knowledge bases and from having to maintain our services on different platforms with different software.”⁴

Moving from the need to navigate multiple systems with multiple logins to a single solution with one login “is a huge improvement over our former system... Being able to activate many of our resources and then immediately have them available in Primo for users is a huge time saver, it’s a labor saver and makes it easier for us to manage the content that we have. The content gets updated automatically and is really reliable,”⁵ she added.

The Alma & Primo Unified Approach to Library Solutions

Ex Libris solutions are designed to work together to ease the workload of library staff who are under increasing pressure to better serve their patrons, take on more responsibilities, and grow the value of the library to its many stakeholders. The Alma & Primo unified approach provides maximum efficiency across all day-to-day operations, connects systems traditionally located outside the library, and automates daily tasks to improve library experiences and services for ALL users – including librarians, students, faculty and researchers.

For example, Alma unifies management of print, digital and electronic resources available from diverse sources such as unique institutional collections, open access, licensed content, and subscriptions – all from a single system.

When paired with the Primo discovery solution, library materials activated in Alma are automatically discoverable to patrons, without the need for additional librarian content management, or long waiting periods before in-demand library resources are made available to users.

Bettina Kaldenberg, Head of Department, at the University of Mannheim, highlights how Alma meets her collection management needs, “Everything had to work quickly and precisely. Thanks to the Alma Community Zone, we could activate or deactivate sections of our ebook inventory at any time. We were also able to better communicate with our users. This was easy to implement with Alma.”⁶

A cutting-edge solution developed to meet real needs, at scale

Alma and Primo together ensures that all resources in all formats are not only easily managed, but all resources are also activated on the discovery side without an additional layer of effort from library staff. This means in-demand library materials are available immediately to users without the typical time lag that comes with most legacy systems with separate front-end systems and workflows.

The reduced cycle time between resource activation and discovery ultimately increases patron satisfaction, delivers faster turnaround that library staff desire, and creates a positive experiences throughout the library. Beyond that, making these materials more quickly available supports scholarly outcomes, maximizes exposure of library resources, and improves usage as patrons will continue to look to the library as a reliable and current source of knowledge and resources.

“The Alma & Primo solution really is wonderful and I recommend it to smaller libraries. It’s not scary as long as you have the right support in place, and we have that from Ex Libris.”

Maryka Brown, Cairnmillar Institute

Leveraging both Alma and Primo enables libraries to:

Enhance productivity with unified administrative workflows



Have one admin interface for all platform applications with role-based restrictions



Eliminate the need to duplicate configuration between two systems – configure just once for both Alma and Primo



Easily switch between backend and frontend interfaces, allowing catalogers to see what their work looks like on both sides

Streamline publishing and real-time discovery



Display new and changed records right away – updates to existing Bibliographic metadata or inventory are immediately visible to the end user



Create search scopes instantly without the need for reloading/reindexing by using conditions based on inventory or metadata



Use real-time normalization rules to define what metadata fields and subfields to display, and push changes out to patrons immediately

Improve user experience to support research and learning



Simplify patron services with one single and familiar interface to search across library resources and manage their library activity



Enhance discovery pathways via contextual material relations, such as through a citation trail, article/book recommendation services and virtual browse functionality



Enable patrons to navigate the hierarchy of collections and sub-collections managed in Alma, to locate and view their associated items

The benefits of Alma and Primo together apply no matter the size of a library or the institution it serves – from large universities around the world, to consortia and smaller local colleges and trade schools. The Alma & Primo solution is flexible and scalable, so that it can meet the needs of evolving communities, like the Cairnmillar Institute.

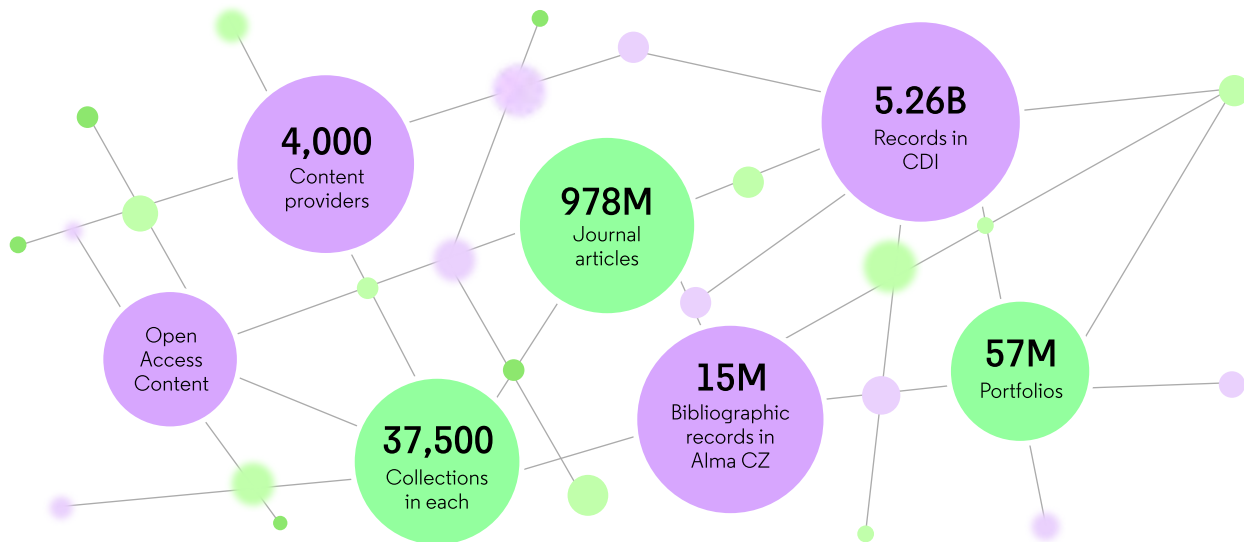
As the institute grew from its initial offering of postgraduate courses in counselling, psychology and psychotherapy by adding undergraduate courses, “we had a broader range of student levels, with different needs coming in,”⁷ said librarian Mary Turnbull during an interview. The library’s legacy system, which was built to support specialists and small educational libraries, was no longer adequate. “It was time to change because we were growing. Students were expecting more.”⁸

At that time, Mary was the Cairnmillar Institute’s sole librarian which initially caused her some hesitation when considering the transition to Alma and Primo. The other libraries she knew that had implemented the integrated solution from Ex Libris had far larger teams and she was concerned Alma and Primo would be more complex than her institution could handle.

She said, “I looked at all the functionality and I thought it was fantastic. But I discounted it because I thought it was too big. I didn't think it was suited for a smaller institution, even one that was rapidly growing.”⁹

However, support from Ex Libris proved the solution could scale down appropriately. Cairnmillar Institute went on to eventually add a second librarian, Maryka Brown, who said “[The Alma & Primo solution] really is wonderful and I recommend it to smaller libraries. It’s not scary as long as you have the right support in place, and we have that from Ex Libris.”¹⁰

Alma & Primo Powered by High Quality Content



Centrally managed, high-quality content at scale powers both Alma and Primo solutions providing efficiencies and streamlining workflows

Thinking Forward: Prioritizing Innovation with Alma and Primo

As Ex Libris continues to build on decades of experience developing innovative solutions for emerging challenges faced by libraries and their communities, we work closely with our user groups to consistently update and upgrade our existing portfolio, purposefully leveraging the latest technologies, ensuring robust security and accessibility standards, and enhancing usability on the frontends and backends to demonstrably advance library impact and ROI.

We know that when libraries invest in Ex Libris solutions, they are investing in the future. So while our solutions meet the actual needs of the communities they serve today, we are also looking out for the communities libraries will be serving tomorrow. Innovation is focused on using the best-fit technologies to address the real challenges of real users. This includes the wise application of AI technology and the use of Linked Open Data.

Ongoing development for Alma is best represented through its forward-looking two-year roadmap. This plan ensures that libraries can take advantage of the latest resource management services available, address current and future needs of libraries and help library staff manage their resources more efficiently and effectively. The Alma roadmap spans across many different functional areas of resource management, such as acquisitions, metadata management, resource management, fulfillment, and more. Key themes are also established, with themes in 2024 focusing on workflow simplification, Linked Open Data, authority management, consortia management and Open Access.

For Primo, first introduced in 2008, there are ongoing, extensive efforts toward shaping the future experience for patrons in over 2700 libraries. In mid-2023 we announced the Next Discovery Experience (NDE) vision, some of which will be released throughout 2024. Our vision is to leverage innovation and modern technology, includes developing a new user interface to deliver a superior user experience, capitalize on user engagement analytics to better understand how patrons use the library systems, take advantage of Linked Open Data, and support the use of AI through a discovery research assistant.

Alma focus areas for 2024:

- ✓ Simplification
- ✓ Authority management
- ✓ Consortia management
- ✓ Open Access
- ✓ Linked Open Data

Discovery focus areas for 2024 and onwards – the Next Discovery Experience:

- ✓ New UX pages for Primo
- ✓ User engagement analytics
- ✓ Taking advantage of new AI technology
- ✓ Linked Open Data

How Alma & Primo Help Libraries Reimagine Their Future

The integration of Alma & Primo significantly improves the cost (and frustration) associated with managing multiple systems to perform multiple tasks, and meeting the evolving needs of library users. But that's only the beginning of what's possible with revolutionary solutions.

When staff spend less time on manual duties, they can focus their efforts on supporting student life, teaching, and collaborating across institutional departments, for example. This ultimately elevates the role of the library in the higher learning ecosystem, better positioning it to align and support institutional goals related to student and researcher success.

This also opens the door to grander ambitions when libraries create their visions for the future. With the support of the Ex Libris integrated solution – developed in partnership with a passionate user community – poised to evolve along with the ever-changing needs of libraries and their communities, there is no limit to what the libraries of tomorrow will be able to accomplish.



Sources:

- ¹ [Commentary: The future \(budget\) of the academic library, Physics Today, by Lisa Janicke Hinchliffe](#)
- ² [3 Questions on Academic Library Staffing for ACRL's Mary Jane Petrowski, by Joshua Kim](#)
- ³ [Case Study: Fisk University, A Small Library Optimizes E-Resource Management](#)
- ⁴ [University of Nevada-Reno capitalizes on a unified approach through Alma and Primo, with Molly Beisler](#)
- ⁵ [University of Nevada-Reno capitalizes on a unified approach through Alma and Primo, with Molly Beisler](#)
- ⁶ [Case Study: Modernizing Library Services at the Mannheim University Library](#)
- ⁷ [Case Study: Cairnmillar Institute: Big-Library Capabilities Delivered on a Smaller Scale](#)
- ⁸ [Case Study: Cairnmillar Institute, Big-Library Capabilities Delivered on a Smaller Scale](#)
- ⁹ [Case Study: Cairnmillar Institute, Big-Library Capabilities Delivered on a Smaller Scale](#)
- ¹⁰ [Case Study: Cairnmillar Institute, Big-Library Capabilities Delivered on a Smaller Scale](#)

Alma. It's the right choice.

Alma is a proven, flexible, and unified resource management platform used successfully by more than 160,000 users in more than 2500 libraries worldwide. It leverages advanced, innovative technology to meet your library's current and evolving needs – whether you are wanting to improve management of electronic, print, and digital collections, or just your electronic collection. Let us show you how to unlock your library's full potential with Alma, today!

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