



ExLibris
Part of **Clarivate**

Five Questions That Can Elevate Your Library

Librarians in academic institutions often wear a number of hats. These librarians might be everything from library director, budget manager, research librarian and copyright manager to event planner, emergency coordinator and even team cheerleader.

And the balancing act has become trickier with the increase in virtual and hybrid learning, which has made the support for students and faculty more important than ever. Libraries are being called upon to offer additional services, 24/7 online support, access to course materials for both online and in-person learning, and more. To meet these demands, libraries need effective communication and collaboration across their campus and, many times, throughout their region and globally.

As librarians seek to fulfill their core role – facilitating learning, teaching and research – many are simultaneously facing budget cuts and staff shortages. At the same time, institutional leadership is looking for evidence of value from the library, as patrons expect the kind of personalized technological interactions they've become accustomed to as consumers.

What Do Librarians Think?

Librarians are feeling the squeeze. A survey of 1,843 librarians from over 30 countries, published by Library Journal in the 2021 State of Academic Libraries Report, revealed what librarians currently see as their library's primary challenges. The top three, in order, are:

1. Acquisitions budget limitations
2. Staff shortages
3. Communication and collaboration with faculty

According to the study, the first of its kind on a global scale, it is these issues that confront librarians as they try to meet their library's overall goals. Survey respondents rated the following aspects of their library's mission as being of high importance:

1. Provide an excellent patron experience
2. Teach students research and information skills
3. Support the institutional mission
4. Prove library value to institutional leadership
5. Provide course materials and support faculty
6. Connect the library to the academic ecosystem

Taken together, it appears that libraries need to adopt new approaches and solutions that will help them provide more value, contribute to student success, and meet dynamic needs. As they do so, librarians should be asking themselves five key questions.

Question 1: The pandemic has had a major, ongoing effect on libraries. How are they becoming more agile and adaptive to change?

The migration to the cloud, a trend that started long before the pandemic, accelerated significantly with the onset of the pandemic. SaaS solutions allow libraries to adapt quickly to changing needs, to experiment with new services and to work in different ways than they have in the past. This agility is made possible, in part, by continuous innovation and a seamless rollout of new capabilities.

Analytics has become a key factor in providing a deeper understanding of how the library operates and how it can improve, as well as showcasing data that can demonstrate the library's value to the institution. Smart, comprehensive analytics enable evidence-based decision-making, drive process improvements, and ensure that libraries get the most out of their budgets. Analytics are now a must-have for any academic library, along with the demand for holistic visibility into all library activities.

The pandemic has dramatically ramped up an activity that had been underway in many libraries for some time: digitization and expansion of electronic collections. Libraries are still learning what the right mix is for them, but the advent of Covid-19 led many to shift virtually overnight to almost exclusively loaning electronic resources. The flexibility this shift demanded from librarians, vendors and technology providers is the basis for a more adaptive approach to resource sharing going forward.

Ex Libris Use Cases

- The Ex Libris Higher Ed Platform is the unified cloud-based home for the library services management solution Alma; Leganto for course resource list management; the research information solution Esploiro; Rapido for interlibrary loan, and the discovery solutions Primo and Summon. This comprehensive platform enables the library to easily adopt the SaaS model for supporting teaching and learning, assisting researchers, and providing new services.
- Analytics underpins the Ex Libris Higher Ed Platform, allowing the library to perform different evaluations with a broad and in-depth perspective. For example, the library can evaluate course resource use (as measured through both loans and click-throughs), and then leverage this information in the automated Title Matching Fast (TMF) service for cost-effectively optimizing the library collection.
- Ex Libris provides the support and tools necessary to systematically transition to collections with more digital and electronic resources. This includes integrating emerging resource management technologies such as controlled digital lending (CDL). Ex Libris supported Harvard University in their roll out of CDL in the past year, after which it has become more common in many other libraries.
- Ex Libris RapidILL, the unique collaborative resource sharing solution, proved to be crucial to library agility from the start of the pandemic. With interlibrary loan librarians working from home and only able to provide electronic resources, the RapidILL community responded very quickly by removing print materials from the workflows and enabled continued effective delivery of all available resources.

Question 2: With budget cuts and uncertainties, how are libraries doing more with less?

for ways to maximize the resources, and to rethink their collection development strategies to better achieve the library's mission.

Today, many libraries using siloed and outdated systems are considering how they can work smarter and more efficiently. One step would be consolidating the management of print, electronic and digitized material, as well as other library operations. Many libraries have discovered that a single, unified system, by its nature, removes artificial barriers, streamlines workflows, and introduces greater coherence.

Automation is another key timesaver that can be introduced to library workflows. By minimizing or, ideally, eliminating time-consuming routine tasks in the librarians' workload, fewer staff members can accomplish more in a shorter amount of time. Reference librarians, for example, are free to attend to those aspects of their day-to-day work that require their unique expertise, rather than expending effort on high cost, low return activities such as manual data entry. In the event of unusual events, such as the pandemic, automation allows librarians to work more efficiently, respond faster, and stay focused on helping their patrons, instead of managing tedious technical adjustments.

Ex Libris Use Cases

- Ex Libris Alma is a single, unified library management system for print, electronic and digital resources, which streamlines everything from collection development to discovery to resource sharing. And, as solutions on the Ex Libris Higher Ed Platform are cloud-based SaaS products, upgrades and maintenance are cost-free.
- Innovative, more efficient library management is possible with the tight integration offered across the Ex Libris portfolio. For example, a faculty member request for a specific mandatory material, through Leganto, may automatically trigger an acquisition workflow in Alma. Alma provides the essential data to Rialto, a one-stop vendor-neutral marketplace for academic content. The newly acquired item becomes available to students, automatically, through Leganto, as well as through Primo or Summon. In practice, Rialto has been cutting the time Ex Libris customers spend on acquisitions by around 50% for each order.
- The powerful analytics built into the Ex Libris Higher Ed Platform help libraries proactively and automatically identify needs and make smarter decisions. Leganto, for example, is much faster at accommodating course lecturers and meeting their requests. The library team at the University of Edinburgh managed to increase the number of courses they supported by 67% within the first year after migrating from Talis Aspire to Leganto.
- Automation is integral to all Ex Libris solutions. Rapido and RapidILL customers, for example, report significant reductions in turnaround time and in the time their staff members need to devote to resource sharing requests. In many cases, no staff time is needed at all, as the process involves completely unmediated workflows.
- Ex Libris solutions also support unmediated purchasing. Libraries can manage this transaction model, including aspects such as demand-driven and evidence-based acquisitions, without requiring additional staff.

Question 3: How are libraries taking a more strategic role in the academic world?

Library transformation is about elevating the profile of the library in academia. One effective approach is proactively identifying a clear need in the institution and meeting it by providing new services. Understandably, everyone, including librarians, is hesitant when it comes to expanding their role. For example, in regions where traditionally the library was not involved in the provision of all course materials to students, library managers may feel unsure about offering such support or about scaling up what they have done so far. Nonetheless, supporting course materials would demonstrate commitment to the institution's goals and demonstrate the library's value, which can in turn influence budgetary and staffing allocations.

Librarians have played a very central and strategic role in the pandemic response in academia by ensuring institutions maintained the levels of service they were meant to be providing for students. The awareness of faculty and students to the library services, therefore, has increased. Now, as the community is slowly beginning to emerge from the other end of the pandemic, the expectations from the library have grown in certain areas.

Both students and faculty expect interactions with the library that mirror the experience they have elsewhere in their digital world. This kind of interaction goes well beyond having the materials available for students and faculty; it's also about understanding users' real-world behavior. For example, they will most certainly not always go to the library website to find the materials that they need. Therefore, the library needs to have a presence in other spaces, such as the learning management system and mobile devices. The idea is two-fold: bring value to patrons where and when they need it; and ensure the agility necessary to meet the demands of the changing academic ecosystem.

In relation to the faculty, libraries are now much more focused on engagement and the provision of course materials. Increasing collaboration with faculty members should be encouraged and promoted. In addition to fulfilling the library mission of assisting learning and teaching, tight collaboration demonstrates the library's indispensable value in saving lecturers time and effort.

Ex Libris Use Cases

- Rapido transformed the design of resource sharing solutions by focusing on the needs of researchers and students. As a result, Rapido customers report that their users are getting more value from their library. With Rapido, resource sharing librarians are providing exactly what the student or researcher needs very quickly. An article or scanned book chapter can be provided through email within one hour or at most 24 hours. This experience meets or exceeds patron expectations and immeasurably increases the library reputation as the go-to problem-solver.
- Leganto and Esploro are at the center of much collaborative engagement between the library and faculty. The solutions provide insight and visibility into both faculty needs and accomplishments. As a result, acquisitions are more precisely defined and valuable, while research is more widely disseminated.
- With Rialto, Librarians can collaborate easily and quickly with faculty members as part of the selection and ordering workflow to address faculty needs in the most efficient way.
- The integrated uses of a unified Alma and Primo saves libraries time and effort in their day-to-day operations. This timesaving has freed up the resources needed to devote more attention to assisting faculty and researchers, a clear institutional benefit of more efficient and holistic services management.

Question 4: How can libraries reach end users in the context of teaching and learning?

We tend to forget that today's students come to the university with little knowledge about what an academic library offers. They live in the world of social media and Google. Teaching students how to look for materials, how to evaluate their quality, and how to get access to these materials is a big and extremely important task — and it is the library that can do that best.

In most cases, the first-time students need to access scholarly materials is when their instructors add these materials as course resources. This happens in the context of the learning management system. However, often, the library is excluded from this process and has no clue what is being assigned for courses. This is a missed opportunity.

While instructors might share materials as uploaded files, without context, or links embedded in the course page, the library reference could provide much more information (such as who wrote the scholarly work, where and when it was published, and which other materials are relevant in the specific context). Libraries devote the necessary resources to ensure consistent, stable, and free of charge access to resources.

Furthermore, the impact of the library can be felt throughout a student's academic career. Once they are exposed to the library, students better understand how to leverage the library's services such as its discovery system or scholarly databases. Having a better starting point changes the quality of students' education and interaction with their instructors.

Ex Libris Use Cases

- The Ex Libris Higher Ed platform provides the integrations needed to connect the library to the academic ecosystem, helping the library provide an excellent, seamless experience for patrons. For example, Leganto is the library's tool for supporting course resources through the learning management system. The solution is adapted to the specific needs of librarians, faculty, and students. Similarly, Alma integrates with student information systems, financial and bursar systems, and more.
- Ex Libris allows libraries to scale up to meet the increasing need to support teaching and learning through automated workflows for provisioning course materials. For example, with the streamlined workflow with Alma and Leganto, Rialto makes the entire acquisition process flow efficiently and automatically from material request to fulfilment, while eliminating manual work and providing the course relevant information embedded within the purchasing decision.
- Ex Libris helps the library focus its efforts and resources that are most important for end users, increasing their engagement with them. Alma, for instance, provides recommendations and guidance such as identifying titles with a high request load to ensure that the library provides them as needed.
- Ex Libris discovery solutions, Primo and Summon, provide students with the tools they need to conduct their own research effectively. The integration with Alma ensures students can access the resources they need, when and how they need them.
- From a resource sharing perspective, Rapido and RapidILL help unlock content from other institutions. This helps libraries meet the growing demand for resources that are not necessarily held in local collections and quickly meet patron needs, encouraging future interactions.

Question 5: What's the difference between "being open source" and "being open"?

The first thing to know is that these terms do not refer to the same thing.

Open-source software is code developed in a decentralized way by many contributors and then made publicly accessible. Anyone can see, modify and distribute the code as they see fit. It is an uncontrolled, decentralized environment without the change or quality controls and support provided by commercial solutions. Often, open source and free solutions have hidden costs when fixes, patches, link resolvers, or analytics, are needed.

Open applications, on the other hand, can be commercial solutions. They allow access to data both through user interfaces and through application programming interfaces (APIs), enabling interactions with various technical components or applications.

Demands for customizability and flexibility have been driving the move toward greater openness. Open solutions are expected to allow users to create, share and use adaptations designed to suit their particular needs.

Openness can also imply automatic updates and installation of new features, whenever the user accesses the solution or on demand. Such updates are also, generally, open.

The more open a solution is, the more likely there is a user community around it. Members share ideas and interact with the solution developers in an organized, efficient manner. Being open is all about listening and collaborating with the community, enabling institutions to do what they need with minimal limitations and maximum confidence.

Ex Libris Use Cases

- The Ex Libris software portfolio consists of open solutions, with product and technical teams developing the software with the flexibility needed to meet customer needs today and in the future.
- Ex Libris Alma was built from the ground up as a unified and cloud-based SaaS solution with open platform technology. This includes several key features and capabilities for integration, customization, and adaptation to suit any library ecosystem. Customers can experiment and test such options on the Ex Libris Developer Network. All Ex Libris documentation is completely open and accessible.
- Ex Libris Alma provides updates and new features multiple times each year, with over 100 releases since the system was introduced. Each update or new release is automatically distributed across the entire Ex Libris Higher Ed Platform, ensuring that Alma and all other Ex Libris solutions are always in sync.
- Over 200 APIs give programmatic access to data and workflows managed in Alma and other Higher Ed Platform solutions. Currently, more than 50% of Alma's activity is API-driven and there are more than 1,000 API calls by Alma users every minute.
- Users of Alma and other Ex Libris products can build on the large API set to develop their own applications for additional functionality, streamlined workflows, integration with other systems, and almost any other library-centered purpose.
- Primo Studio makes it easy for library staff without coding or tech skills to use the Open Discovery Framework to customize the Ex Libris Primo discovery interface. Any integrations, extensions and customizations will not be disrupted by future upgrades of Primo.
- Alma supports all major open industry standards, facilitating collaboration with institutional colleagues on a turnkey basis. More broadly, Ex Libris customers can share their customizations, accessories, tips and tricks with a very active global network of users through the Developer Network Tech Blog. They can also ask a question through the forum, which will be answered by community members and/or Ex Libris experts.

Bonus Value-Added Question: What is Only Ex Libris Able to Offer?

Ex Libris is dedicated to helping libraries support research, teaching and student success with the most effective, customizable and comprehensive solutions available.

- Proven solutions, supported by years of research and development.
- A real ecosystem of comprehensive cloud software solutions with a clear development road map, extensive free, openly accessible documentation, and the latest international cyber security and privacy certifications.
- A thriving global user community that shares best practices and open apps, helping users meet essential and changing institutional needs.
- User groups, an idea exchange platform and more, giving customers a voice in product development.
- A team of experts providing world class customized support, training, professional services, and a customer success program.

Contact us for more on how Alma, Primo, Summon, Leganto, Rialto, Rapido, RapidILL, and Library Mobile can elevate your library to a higher level.

About Ex Libris

Ex Libris, Part of Clarivate, is a leading global provider of cloud-based solutions for higher education. Offering SaaS solutions for the management and discovery of the full spectrum of library and scholarly materials, as well as mobile campus solutions driving student engagement and success, Ex Libris serves thousands of customers in 90 countries.90 countries Visit www.exlibrisgroup.com

