

Alma / Primo Leads Call - October 31, 2017

Attending:

Updates from the October LLC meeting

Library Consortium Services Manager report:

https://docs.google.com/document/d/1jmpFTch3IOMUSkj8YECTSorHjt44g_7m4xt_0Fj150g/edit?usp=sharing

WACTCLC Open Discussion Notes

<https://drive.google.com/open?id=0ByZduCgrfxQ4NklQQjB2bER2Y0k>

Trending topics from the past two weeks

Alma and PCI Activation and Publishing to Primo

see:

https://docs.google.com/presentation/d/1k_XAUOw7NXwkR4_uGknHbrSqQHEZ4Gf-0Kd302SAiOs/edit?usp=sharing)

New Alma UI

Adoption of the new Alma UI continues on across institutions, towards the Jan 1 2018 cutover. In general, the new Alma UI is working well.

Though, we have seen (and reported) a few cases where the new Alma UI has introduced new issues. Please continue reporting any such cases via SF, or post to wactclc-alma listserv with reports if you aren't sure.

SF Cases opened on the new UI by our institutions include:

- 484583, Yakima (problems saving Fine/Fee Profiles via the new UI)
- 468257, Olympic (problems associating holding to POL)
- 477085, Seattle (problems viewing items from within course reserves reading list)
- 472252, Seattle (warning message in MEditor about leader 18)

If you are aware of any other new Alma UI Salesforce cases not listed above, please email Wade with the case #.

IMPORTANT NOTE: As of Jan 1, 2018, the classic Alma UI will no longer be available, only the new Alma UI.

For reference on New Alma UI, see:

- https://knowledge.exlibrisgroup.com/Alma/Training/Introduction_to_New_Alma_User_Interface
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Getting_Started/Whats_New_in_Almans_New_User_Interface](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Getting_Started/Whats_New_in_Almans_New_User_Interface)

Advanced Searches – Alma Classic UI vs New UI

The logic of how advanced searches are built changed in Alma's new UI from Alma's classic UI. As a result, saved advanced search queries (logical sets) built in the classic UI cannot be edited in the new UI (and vice versa). These queries must be recreated in the new UI.

For additional reference, see:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/Searching_in_Alma/Advanced_Search_Logic%3A_Differences_Between_the_Classic_and_New_UI](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/Searching_in_Alma/Advanced_Search_Logic%3A_Differences_Between_the_Classic_and_New_UI)

Community Zone activation vs Manual Creation of electronic collections

We discussed some specific collections and instances where creation of a local electronic collection offers better discovery for patrons than activating the equivalent community zone collection.

Specific collections mentioned as subjects of such local electronic collections include:

- EBSCO ebooks
- Films on Demand
- Kanopy
- Gale ebooks
- PQ Ebook Central
- SWANK
- Salem Press Books
- OVID
- Books 24x7

Creation of a local electronic collection requires obtaining MARC records for the collection that contain the relevant resource URLs in an 856 field.

Records for some collections are available through WorldShare Collection Management

Wade will create a document to share via wactclc.org that describes the creation of a local electronic collection, and some of the steps involved, including obtaining MARC records via WorldShare Collection Management.

The document is *not* yet created, but you can watch its development (and comment!) at the following link:

https://docs.google.com/document/d/1oIAreDDhiZ5tFT94dn445WhXloLyKAROpIw_CrPHzl/edit?usp=sharing

How to make a stand-alone portfolio a member of an electronic collection

As an aside, to the aforementioned conversation, this question arose.

To move a single stand-alone portfolio, see:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_Portfolios_Individually_to_an_Electronic_Collection](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_Portfolios_Individually_to_an_Electronic_Collection)

To move a set of stand-alone portfolios to an electronic collection, see:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_a_Set_of_Standalone_Local_Portfolios_to_a_Local_Electronic_Collection](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_a_Set_of_Standalone_Local_Portfolios_to_a_Local_Electronic_Collection)

Contributing Electronic Collections to the Community Zone

This topic also came up as part of the general electronic collections discussion.

It is possible to contribute electronic collections to the community zone, subject to Ex Libris acceptance based on a series of consideration.

Though, I (Wade) was **wrong** on a **crucial** point. We **cannot** create for community zone submission an electronic collection of vendor records, such as we would use to create a local electronic collection for ourselves, based on reasons of accuracy, etc. (It was a great idea, though :)

And, in hindsight, this seems obvious. Such vendor records would be subject to copyright, and are not ours for distribution to others.

The types of electronic collections that you **can** submit to the community zone would include electronic collections representing things like special collections (say, online versions of an author's works bequeathed to the library), for which the library has publication rights. Or databases (say, of historic weather data), which represents intellectual property to which the library or institution has publication rights.

For additional info about contributing to the community zone, see:

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management/050Inventory/090Contributing_to_the_Community_Zone_%E2%80%93_Electronic_Collections_of_the_Database_Type](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/090Contributing_to_the_Community_Zone_%E2%80%93_Electronic_Collections_of_the_Database_Type)
-

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management/050Inventory/070Contributing_to_the_Community_Zone_%E2%80%93_Local_Electronic_Collections](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/070Contributing_to_the_Community_Zone_%E2%80%93_Local_Electronic_Collections)

Upcoming

Alma November 2017 Release

Alma November 2017 release is coming this weekend (11/4, 11/5). Release notes available at:

https://knowledge.exlibrisgroup.com/Alma/Release_Notes/0099_2017/02_November_2017/Alma_November_2017_Release_Notes

Most interesting new features for us include:

- [View Only Catalog, Repository, and Acquisitions Administrator Roles](#) – As was added in the [September release](#) for Fulfillment and User Management, a read-only role parameter was added for the Catalog, Repository, and Acquisitions Administrator roles. A user who has this role with the role parameter enabled can view configuration options but not edit them. This feature exists in the new UI only.
- [New Electronic Collections Added to the Alma CKB](#)
- [Move PO Lines and/or Licenses from an Existing Electronic Collection to a New Electronic Collection](#) – Alma now provides the capability to move PO lines and/or licenses from the existing electronic collection to a new replacement electronic collection.

Discussion about ELUNA attendance

We briefly discussed ELUNA, and generally agreed that attendance at ELUNA by institutional leads and functional leads is highly encouraged, as is submission of presentation proposals, as applicable.

Meanwhile, Wade is checking with ELUNA to ensure that the WACTCLC membership can be used by member institution staff for ELUNA membership discount to the conference. And will report back.

Meanwhile, the WACTCLC membership number is C-1792. If you are registering for the conference soon, go ahead and register as an ELUNA member using that number.

ELUNA 2018 Spokane:

<https://el-una.org/meetings/eluna-2018-meeting/>

Call for Proposals:

<https://proposalspace.com/calldetails/799>

Attendance at WACTCLC session at Quarterly LLC

As per the DRAFT WACTCLC meeting minutes, it is currently anticipated that an open WACTCLC meeting will take place at the formal conclusion of the quarterly LLC meeting, and in the same location as the quarterly LLC meeting, with remote attendance available via Zoom.

And, as per the DRAFT WACTCLC meeting minutes, all library staff of WACTCLC institutions are considered members of WACTCLC and are welcome to attend.

So, this meeting offers an opportunity to hear, and participate in, the discussions shaping the future of your consortium.

Potential for November / December 2017 In-person Meeting?

Over the course of the spring and summer, the institutional leads from C1 participating in the leads calls, later joined by institutional leads from C2, continued to express the desire for opportunities for in-person meetings.

Recent examples of such meetings include the new Primo UI all-day session held at Highline (specifically for Cohort 1 institutions), and the Alma / Primo breakout session held at CLAMS.

Now that I (Wade) am relocated to northern Washington, I hope to have to opportunity this fall to visit Skagit Valley College, Bellingham Technical College, and Whatcom College.

Bringing those two thoughts together, I would like attempt at least a small gathering (perhaps at Skagit Valley College) with those northern institutions. And opening an invitation to any others able to attend. Likely topics would include analytics and electronic resources.

We didn't have much time to discuss possible dates, but I will float some dates soon, and perhaps we can squeeze in a meeting before the end of the year, depending on the usual variables of staff availability, feasibility of travel, and space availability. Stay tuned.

Chat Transcript

00:17:08	Jennifer Rohan:	yes I can hear you
00:17:21	Lesley at Pierce:	Hahaha
00:23:45	Nicole-Bellevue:	My boss thought that Alma was a global catalog...
00:24:24	Sally - Whatcom:	That was the key idea behind selling the project.
00:25:12	Sally - Whatcom:	I mean key selling point, but maybe not highest priority (?)
00:25:14	Nicole-Bellevue:	She is not familiar with the day-to-day things
00:25:49	Kirsti Thomas (Seattle):	Money
00:26:03	Sally - Whatcom:	Would that mean a network zone? (Kirsti, aint it the truth).
00:26:20	Kirsti Thomas (Seattle):	Yes. Union catalog = Network Zone
00:28:22	Lesley at Pierce:	It sounds like a mouse
00:28:26	Nina Pitts - Peninsula:	Who has been using helium?
00:28:31	Traci Taylor - BTC:	lol
00:28:35	Jennifer Rohan:	It's definitely Halloween!
00:28:55	Shellie Whittaker:	So, LPH, your audio did not come thru
00:30:39	Sally - Whatcom:	dragich
00:36:11	Nicole-Bellevue:	I did
00:36:32	Nicole-Bellevue:	But they were freebies that come with other databases.
00:43:35	Lesley at Pierce:	That's what we use for EBSCO ebooks
00:43:54	Nicole-Bellevue:	I use Worldshare for EBSCO PDA
00:47:15	Lily (SPSCC):	Yes
00:47:17	Lesley at Pierce:	Yep, FOD
00:47:24	Lesley at Pierce:	Gale ebooks purchased
00:47:25	Nicole-Bellevue:	SWANK, Salem Press Books, FOD
00:47:41	cara.stevenson:	Yes, FOD & EBook Central
00:47:46	Lily (SPSCC):	ebrary/PQ Ebook Central
00:51:46	Dale Burke - Edmonds:	Also Books 24x7

00:53:56 Nicole-Bellevue: I'm having trouble with an individual e-journal. I could make a local collection of one, but that seems silly. I swear I did it before...

01:01:05 cara.stevenson: do we have access to the new UI?

01:01:17 cara.stevenson: I only have a preview

01:01:34 Kirsti Thomas (Seattle): Seattle has switched to the new UI completely

01:01:38 Shellie Whittaker: I can follow up with Cara Beth

01:01:49 cara.stevenson: Thanks, Dale. I see it.

01:03:57 Dale Burke - Edmonds: I wanted to let everyone know that I did get ExLibris to reload my entire database for the Subject Enhancement; however, this created a big mess. I would recommend holding off until we can get a couple of things cleared up. I will post on the listserv.

01:04:32 Shellie Whittaker: We have been able to in the past.

01:06:11 Dale Burke - Edmonds: I booked yesterday.

01:06:14 Kirsti Thomas (Seattle): I've booked too

01:06:16 Lesley at Pierce: Yes, Sally, I did too because of what you said last year!
Thanks!

01:07:03 Kirsti Thomas (Seattle): There's a \$100 discount for presenters

01:07:22 Traci Taylor - BTC: How many are going?

01:07:27 Tammy Siebenberg - YVC: What dates did you book for?

01:08:32 Lesley at Pierce: Tuesday to Friday

01:08:57 Elena - Skagit: Dec. 8 for Skagit

01:09:04 Nicole-Bellevue: Dec 7 for Bellevue

01:09:23 Lily (SPSCC): Dec 8 for SPSCC

01:09:26 Nina Pitts - Peninsula: Dec 6 for Peninsula

01:09:28 Nicole-Bellevue: I'm leaving for the UK

01:09:31 Shellie Whittaker: faculty libs will be away

01:09:32 Kirsti Thomas (Seattle): Seattle Fall Quarter ends Dec. 14

01:09:52 Lesley at Pierce: Yes as long as it's before Dec 15

01:09:55 John Mullen - Everett: Dec 7 for Everett

01:09:59 Elena - Skagit: We have a non-instructional day that we have to complete outside of the quarter at Skagit, so that could work here.

01:10:16 Kirsti Thomas (Seattle): I'll make it whenever we do it

01:11:09 Traci Taylor - BTC: I will be away the week of December 18th.

01:11:37 Lesley at Pierce: I have to run to meet with a student. Thanks all!

01:12:00 Sally - Whatcom: Poor Nicole, having to go to the UK!

01:12:00 Jennifer Rohan: bye

01:12:05 Nina Pitts - Peninsula: bye