Systems Community Call Agenda

Zoom: https://orbiscascade-org.zoom.us/j/83695774326
Systems Community Calls: https://www.orbiscascade.org/programs/systems/calls/
Code of Conduct: https://www.orbiscascade.org/about/code-of-conduct/

Community calls are recorded unless otherwise noted.

November 2026

Date: November 12, 2026
Time: 9:00 a.m. - 10:00 a.m.

Attendees (please enter your name as you arrive): Serge K (CC), Wade Guidry (UW) , Margaret Alexander (UO), Bill Kelm (WU), Hui Zhang (OSU), Jeremy McWilliams (L&C), Ren Thomas (TESC), Mari Krause (PCC), Jeremiah Kellogg (EOU), Rhian Peterman (SMU), Stewart Baker (WOU), Thomas Dodson (SOU), Rami Attebury (UID), Jim Cloen (Whitman),

Agenda

1. Intro and Announcements (Amy, 10-15 minutes)
    a. Clarivate Customer Care Webinars
        i. What Happens Before Release Day (39:13 recording)
        ii. Introducing the Self-Help Assistant (November 16 at 10pm PT or November 17 at 7am PT)
        A new AI-powered assistant that will be introduced first for Alma, followed by a gradual rollout to other products.
    b. Mixpanel support
        i. Contact Amy C. (acoughenour@orbiscascade.org) for Mixpanel support while Tamara is on leave. This includes setting up your data view, adding or removing user accounts, etc.
    c. Accessibility for Alma letters
        i. Early thoughts about a “hackathon” to crowdsource accessible templates for Alliance libraries’ most-used Alma letters.
2. Group Reports

a. Primo Release Testing Standing Group (Wade & Carlos, 30-45 minutes)

   i. **November Release**
   https://docs.google.com/document/d/1P6gwZE_zWHwh8Ysh2xTPGnEyP7zJjQTU9DAzPiBI2QA/edit?usp=sharing

   ii. Just for general interest, here's an add-on example from another institution

   NDE Hathitrust Add-On

   The University of Minnesota (still in NDE dev) shared its NDE add-on for HathiTrust on the ELUNA Primo list. This add-on searches the HathiTrust Bib API by OCLC number (or optionally ISXN or LCCN) and displays free full-text links on records. Installation and configuration instructions are on their README:
   https://github.com/UMNLibraries/primo-nde/blob/main/apps/addons/hathi-trust/README.md

   Note: We've tried testing this at UW and it didn't "just work." Have not yet investigated further.

3. New Business

4. Upcoming dates (Alliance Calendar):

   a. Next Systems Call: January 21 10-11 am PT
   There will **not** be a Systems Call in December.

   b. ELUNA Learns - Electronic Resources: November 18 10 am - 1 pm PT
   Springshare integration; pre-migration deduplication efforts; electronic resource management at a new institution

   c. ELUNA Learns - Artificial Intelligence (AI): December 2 10 am - 1 pm PT
   Practical AI for Alma; agentic workflows and MCP; post-migration cleanup strategies using AI tools (Jason Cabaniss and Doug Ericksen, Seattle University)

   d. ELUNA Learns - Fulfillment: December 9 10 am - 1 pm PT
   Fulfilment Units, TOUs, and their components; Alma APIs and web applications for laptop lending; cleaning up desk and department configurations

   e. ELUNA Learns - Library Open Workflows: December 16 10 am - 1 pm PT
   Introduction to LibOW; observations and lessons learned from systems and technical services perspectives; measuring impact

f. ELUNA Learns - ILL: January 6 10 am - 1 pm PT
Using Alma to evaluation legacy ILL tools; RapidILL strategies for success; Rapido sets

g. ELUNA Learns: Metadata Management: January 13 10 am - 1 pm PT
Rapid cataloging for inventory control; reintegrating items from a casual reading collection to the main stacks; linked data, AI, and library metadata

October 2026

Date: October 15, 2026
Time: 10:00 a.m. - 11:00 a.m.

Attendees (please enter your name as you arrive): Jeremy McWilliams (L&C), Wade Guidry (UW), Meagan Button (PU), Margaret Alexander (UO), Mike Flakus (PSU), Jeremiah Kellogg (EOU), Laura Buchholz (Reed), Jim Cloen (Whitman), Bill Kelm (WU), Gavin Spomer (CWU), Natalee Vick (SPU), Sid Devarenne (WWU), Rhian Peterman (SMU), Carlos Torres (SU), Thomas Dodson (SOU), Justin Otto (EWU), Jasmine Platon (WWU), Anji Mertens (Gonzaga), Blake Galbreath (WSU), Kathleen Veldhuisen (CHEMEK), Matt Anderson (MHCC), Paul Ojennus (Whitworth), Linh Le (OHSU),

Agenda

1. Intro and Announcements (Tamara, 10 minutes)
    a. Family leave October 26, 2026 - January 15, 2027
        i. Amy Coughenour: Primo troubleshooting
        ii. Lori Hilterbrand: Alma troubleshooting, Support case advocacy
        iii. Lesley Lowery: Alma troubleshooting, NZ Analytics reports and questions
        iv. Maija Anderson: Archives West management
        v. Elizabeth Duell: Group meeting logistics and Zoom, membership on email lists, webpage edits, surveys and social media posts
    b. Clarivate documentation
        i. Knowledge Center retirement and the new Knowledge Portal: Sunset extended to the end of February 2027

        ii. Library Software Known Issues

    c. Mixpanel update

        i. Moving forward, analytics will be sent to Mixpanel for NDE views only

2. Group Reports

    a. Primo Release Testing Standing Group (Wade & Carlos, 30 minutes)

        i. Primo NDE FAQs

3. Alliance Chatbot Project (Tamara, 15 minutes)

    a. Postponed to spring 2027

4. Upcoming dates (Alliance Calendar):

    a. Next Systems Call: November 12 9-10 am PT

    b. **Primo Accessibility Webinar** - October 20 at 1pm PT

    c. **ProQuest Accessibility Webinar** - October 22 at 11am PT

September 2026

Date: September 17, 2026
Time: 10:00 a.m. - 11:00 a.m.

Attendees (please enter your name as you arrive): Jeremiah Kellogg (EOU), Paul Ojennus (Whitworth), Rhian Peterman (Saint Martin's University),Carlos Torres (SU), Emily Pearson (Whitman), Sid Devarenne (WWU), Bill Kelm (WU), Laura Buchholz (Reed), Wade Guidry (UW), Rami Attebury (UID), Kathleen Veldhuisen (CHEMEK), Jeremy McWilliams (L&C), Jim Cloen (OIT), Mike Flakus (PSU),

Agenda

1. Intro and Announcements (Tamara)

    a. Family leave October 26, 2026 - January 15, 2027

    b. Group recruitments

        i. PRTSG looking for 3-4 members now. Fill out the Statement of Interest form to nominate yourself.

        ii. CASG will recruit in January

    c. John Helmer Awards
        i. Awards of $2000 each for projects that benefit the Alliance
        ii. Proposals due December 4, 2026
2. Group Reports
    a. Primo Release Testing Standing Group (Wade & Carlos)
        i. UW's Go-Live Debrief
            1. Wade's slides: Primo NDE Go-live
3. Alliance Chatbot Project (Tamara)
    a. Moved to October 2026 call
4. New Business
5. Upcoming dates (Alliance Calendar):
    a. Next Systems Call: October 15 10-11 am PT
    b. **Primo Accessibility Webinar** - October 20 at 1pm PT
    c. **ProQuest Accessibility Webinar** - October 22 at 11am PT