WACTCLC - Fulfillment / Primo Call - April 24, 2018

Meeting Link:

https://bigbend.zoom.us/j/124326553

Recording:

Attendees:

ELUNA Official

Next week's meetings cancelled due to ELUNA

Special Meeting for ELUNA Attendees

Our annual ELUNA user conference is in Spokane this year and we are hosting a unique and dedicated session for WCTCLC members focusing on embedding community college librarians in teaching and learning. We would love it if you could join us for the lunch and discussion on Thursday, May 3rd at noon.

We will be discussing the student survey and study done by WCTCLC around affordability of class materials (details below, though you've likely seen it). We are interested in hearing whether the WCTCLC libraries are actively involved or plan to be involved in addressing some of the challenges named in the study.

Summary of Preliminary Findings:
https://docs.google.com/document/d/1wqqIH0wYJp5agwn1J9itgfpLOBWY6ac5Btou2pFOaJ8/edit

Slides:
https://docs.google.com/presentation/d/1gFEUElQuQFFt685Ot4EuaeKl7H_mkbVtnXrFLZp9gq8/edit#slide=id.g307696989f_2_55
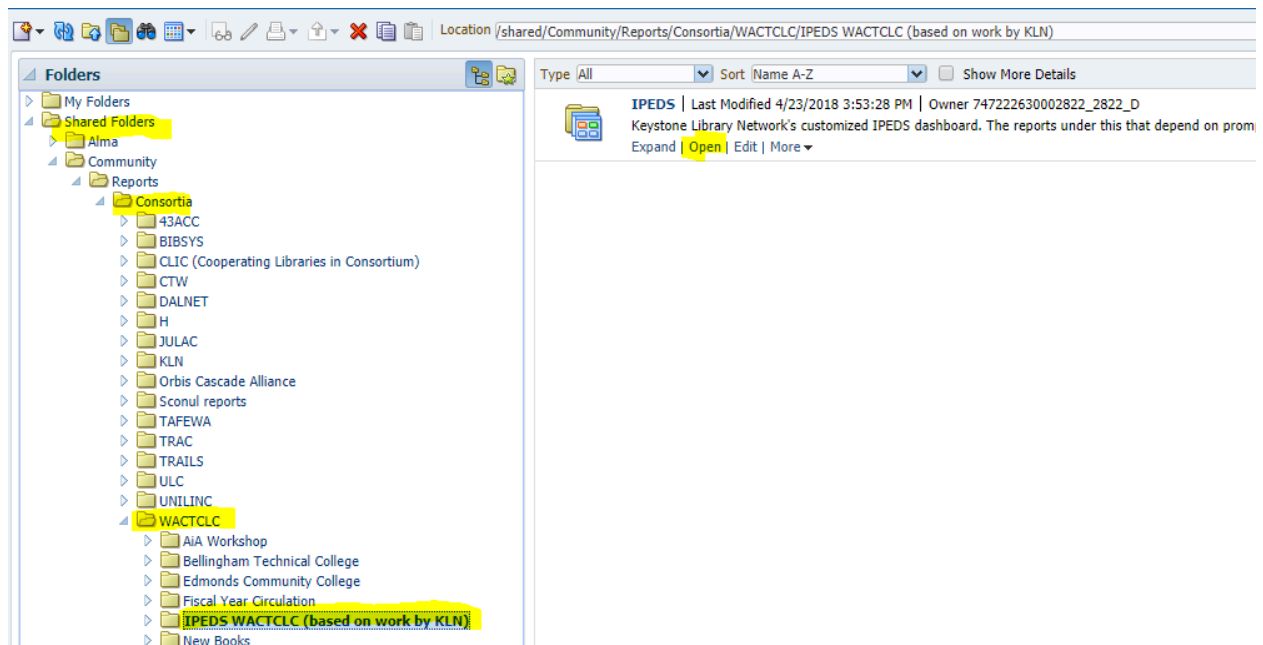
Data:
https://tableau.sbctc.edu/t/SBCTC_DEV/views/AffordabilityCostClassMaterials/Intro?%3Aembed=y&%3Adisplay_count=no&%3AshowAppBanner=false&%3AshowVizHome=no

Alma Analytics Dashboards - IPEDS Dashboard

Creating a Dashboard

IPEDS dashboard in WACTCLC community folder:

Requests in Alma

"Patron-placed requests in Alma are placed on a title. This provides the patron with an easy to understand service, and all details for getting the most appropriate copy are handled by the system, subject to institutional policies and rules. If the patron is requesting a journal title or a multi volume title (i.e. the title has item with descriptions/enum/chron) the request is then placed on the item level rather than the title level, to allow the user to select the needed item."

https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Request_Management

Alma May 2018 Release

Release Notes

May 6 install

Available in Sandboxes now

Dear Colleagues,

What a month!! THREE NERS Enhancements and FIVE Idea Exchange items are part of the May release. For the first time, there are TWO ideas that come from both NERS and Idea Exchange: Moving Portfolios and the New Re-loan Limit.

Be sure to also checkout the Sneak Preview for June – where you will find more NERS and Idea Exchange items.

What's new in the May 2018 release of Alma?

Acquisitions
	Trial Enhancements - The Alma Trial workflow is enhanced with a number of new features; for example, trial participants can be added based on a set of users; there is now an option to create survey questions with a closed list of responses.

	Purchase Request Enhancements - The Alma Purchase Request workflow is enhanced with a number of new features; for example, there are now three new staff roles for purchase requests. Purchase requests in Primo may now be canceled by the patron.

	Reply-to in Vendor Communications - It is now possible to configure a reply-to address for purchase orders and vendor communications. A new email type, Order Response,

was added to the organization unit contact information.

Resource Management

NERS Enhancement & ***Idea Exchange*** Moving Portfolios** - Local portfolios and portfolios activated from the Community Zone can be moved from their current electronic collection to another electronic collection one by one or using a set of portfolios.

Idea Exchange - Normalization for Z39.50 and SRU Records** - Bibliographic records in Alma that are retrieved using Z39.50 or SRU can be normalized prior to being presented using these protocols. For example, institutions can prevent exposure of local bibliographic information such as local notes.

Idea Exchange Physical Item Condition Field** - The physical condition of an item can now be specified using the Alma Physical Item Editor. This information can be included when publishing physical inventory and can be used as search criteria when using the Alma advanced search functions.

ISO 20775 Holdings SRU Schema - Alma's support of ISO 20775 holdings SRU schema continues to be expanded. Electronic and digital resources can now be handled; filtering by campus with the SRU query was added.

Fixed Fields Supported in Extension Packs - In addition to data fields, extension packs can now include fixed fields such as the LDR and control fields 007 and 008. This new capability also includes data fields that have fixed positions, such as 100 $a in UNIMARC and CNMARC.

General Electronic Service Enhanced for Newspaper - The general electronic service's linking capability was enhanced with availability rules for displaying newspaper electronic collections (with no portfolios) through the Alma link resolver. In a future release this capability will be extended to the Primo View It feature.

Fulfillment

NERS Enhancement & ***Idea Exchange*** New Re-loan Limit** – You can now configure a re-loan limit, preventing patrons from re-loaning items that they have just returned.

Holdings Configuration in the Get It Tab - Alma now offers expanded holdings information and customization options in the Primo Get It tab, such as enabling you to configure which of the holdings records' fields and subfields appear.

Resource Sharing

NERS Enhancement - Populate Additional Information for Articles from the DOI or PMID Fields** – When a resource sharing request form for an article is submitted with the PMID or DOI included, additional metadata will now automatically augment the request.

Analytics

Create a Set in Alma from an Alma Analytics Report - You can now create an itemized set directly from an Analytics report. This is particularly useful if you want to globally update a set of records in Alma by first retrieving these records in Alma Analytics.

Administration and Infrastructure

Search Main Menu Navigation Bar – You can now search all options in the Main Menu Navigation Bar in the persistent menu. The search returns persistent menu options, as well as configuration menu options, depending on which options are available to your user roles.

Idea Exchange Select List Size – On some pages, you can now select the list size displayed in Alma: 20, 50, or 100.

Limiting Access to User Information – You can limit operators with certain user roles from accessing other users' information by blocking the operators' ability to search for patron information.

More information can be found in the Alma May 2018 Release Notes on the Ex Libris Knowledge Center.

Chat Transcript

00:12:53   Amy Herman - Olympic: Can you send the link to the notes for this meeting? Thanks!

00:13:06   Wade Guidry: https://docs.google.com/document/d/1aB_NobDFvJctww4E7eBi0RUE1IesbK5oLYDE37Fv0sc/edit?usp=sharing

00:14:41   Greg Bem, LWTech: pronounced boh-young

00:16:52   Amy Herman - Olympic: To be blunt, is this meeting essentially a sales pitch for Leganto?

00:19:05   Nicole-Bellevue: I have the same question as Amy.

00:20:37   Greg Bem, LWTech: Alma-D might require some kind of brainstorming. I'm not sure what folks are already doing that would be supported by Alma-D and what isn't happening but could with Alma-D.

00:22:31   Gerie Ventura/Highline: Highline's Canvas contract is up soon, so they are going out for RFPs or whatever that process is called

00:22:50   Amy Herman - Olympic: Thanks!

00:23:03   Gerie Ventura/Highline: oh ok maybe that's it

00:23:38	Gerie Ventura/Highline:	i'm just there to eat
00:23:44	Greg Bem, LWTech:	Hah.
00:23:51	Amy Herman - Olympic:	LOL
00:24:03	Gerie Ventura/Highline:	and be with y'all of course
00:24:10	Kirsti Thomas (Seattle):	Where's the laughing emoji in Zoom?!?!?
00:24:11	Lesley at Pierce:	:)

00:25:00   Kirsti Thomas (Seattle):   Skype gives me disco dancers and disappearing ninjas. Just sayin'

00:25:28   Greg Bem, LWTech: Skype has emojis and connection problems. Zoom doesn't have emojis and doesnn't have connection problems. MYSTERY SOLVED.

00:31:05   Gerie Ventura/Highline: and then mix the different analyses for various types of departments and then give them permissions to the dashboard?

00:31:20   Greg Bem, LWTech: Knowing the reports you need in advance (and what they are called) can save a lot of time and frustration with the dashboards.

00:32:41   Gerie Ventura/Highline: we're attempting to figure out naming conventions before there are 100s of analyses...

00:34:12   Kirsti Thomas (Seattle):   One of the things I've seen other libraries do, that I like, is listing all of the fields used (with their filters) in the report in the Properties Description

00:34:29   Greg Bem, LWTech: I wonder if header tags carry over to exported files (PDFs etc) re: accessibility in reports.

00:34:31   Gerie Ventura/Highline: that's cool

00:34:55   Kirsti Thomas (Seattle):   The header tags do carry over, at least into Excel

00:35:01   Greg Bem, LWTech: Oh sweet!

00:35:13   Gerie Ventura/Highline: i'd like to know how people generated/reported number of Circs of e resources for IPEDS

00:37:43   Greg Bem, LWTech: Gerie, you raise a good point about universal reporting back on this data.

00:38:09   Gerie Ventura/Highline: thanks for this one, Wade

00:38:19   Amy Herman - Olympic: How did you get there? I only see the IPEDS reports, not the dashboard.

00:38:33   Kirsti Thomas (Seattle):   Gerie-- re: naming conventions... someone on Alma was saying that they've settled on an institutional policy where only certain people create reports in the shared folders. Otherwise reports stay in people's "My Folder"

00:39:00   Gerie Ventura/Highline: interesting, Kirsti

00:39:13   Amy Herman - Olympic: OK, I expanded it and was confused.

00:39:51   Greg Bem, LWTech: Kirsti, do you have a particular person that manages the shared folders reports/dashboards, or is it free for all?

00:40:00   Greg Bem, LWTech: (for Seattle Colleges)

00:40:49   Kirsti Thomas (Seattle):   That was a fairly large, multi-site system though. When I was in a shared system with Evergreen and the State Library, our naming convention was to start the report title with the library abbreviation, and end the report name with the initials of the creator and the date the report was created

00:41:45   Amy Herman - Olympic: The IPEDS dashboard shows me no deletions even though we've been weeding like crazy. Is this because those are "Withdrawals?"
00:42:51   Gerie Ventura/Highline: i could so easily get lost in Analytics for hours because it's fun
00:43:46   Kirsti Thomas (Seattle):   You and me both! Especially if there are pretty colored charts and graphs involved.
00:45:31   Gerie Ventura/Highline: Naoko is starting that COUNTER data stuff
00:46:14   Greg Bem, LWTech: IPEDS asks for Digital/Electronic Collection data on total books, databases, media, serials, and "total collection." Also "Total Circulation." It's VERY broad and could be interpreted in all the arbitrary ways.
00:47:01   Kirsti Thomas (Seattle):   Oo! Can Naoko come for a visit sometime? We have a subcommittee of librarians trying to work on harvesting COUNTER data into Alma
00:47:48   Lesley at Pierce: That sounds like a great idea for a consortia workday/hackathon!
00:47:51   Amy Herman - Olympic: Kirsti, you have enough librarians to have a subcommittee on something, sigh... (envious!)
00:48:00   Gerie Ventura/Highline: right, amy
00:48:25   Gerie Ventura/Highline: she's not here Kirsti, so i'll say yes let's come visit this summer and have a COUNTER party
00:48:37   Kirsti Thomas (Seattle):   On the down side, it takes forever to schedule meetings
00:50:09   Kirsti Thomas (Seattle):   Gerie-- It's a plan!
00:53:45   Gerie Ventura/Highline: maybe i'll suggest that she share at one of these meetings in future weeks then wade can help us all expand on what she's setup
00:53:59   Lesley at Pierce: Pierce had to mess with this because of the two campuses and dupe titles
00:54:44   Lesley at Pierce: It only gave the option to choose copies if we input certain metadata
00:55:15   Tammy Siebenberg (YVC):   Leslie, what metadata did you have to have?
00:56:36   Kirsti Thomas (Seattle):   Tammy-- If you want people to be able toselect a specific item, there has to be something in the Item Description...
00:56:56   Tammy Siebenberg (YVC):   Ah, thanks.
00:57:10   Lesley at Pierce: Yes, what Kirsti said :)
01:00:22   Gerie Ventura/Highline: oh duh ELUNA: i was thinking of making the most of having all of us there at the same time and -- if you're not tired of Alma stuff already we could get together after dinner and talk about Alma Stuff....just a thought. Maybe after the opening night event?
01:06:48   Laura Staley - Renton Tech: Yes. That's nice.
01:07:54   Kirsti Thomas (Seattle):   I'm in!
01:08:12   Gerie Ventura/Highline: yay i will make it happen. cant wait to see you
01:09:22   Gerie Ventura/Highline: i'd like to talk about how we're training our staff and documenting procedures

01:10:02   Tammy Siebenberg (YVC):   I noticed the search feature in configuration and have found that useful, too.
01:10:45   Gerie Ventura/Highline: thanks, Wade!
01:10:48   Laura Staley - Renton Tech: Quick question: I created a new location, and I'm trying to think of ways to test it before it goes live. I have assigned books to it, checked them out and reviewed the due dates and loan receipts, returned books. What else do you suggest?
01:10:56   Lesley at Pierce: Thanks!
01:10:56   Amy Herman - Olympic: Thanks! SEe you next week!
01:10:56   Nina Pitts - Peninsula: See you next week!
01:11:01   Gerie Ventura/Highline: Primo Laura
01:11:17   Laura Staley - Renton Tech: Yes.
01:11:32   Laura Staley - Renton Tech: yes