Alma UK Exchange of Experience - Breakout Notes

Monday 8 February 2016, at the University of Sheffield

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Actions for Ex Libris

Customer Breakout Discussions

Resource Sharing

Is anyone report importing BL status report?
Is anyone sending out unmediated requests generated via Primo?
Is anyone using “rota assignment” or “locate profile”?
How are institutions using Alma for lending?
Are there any further planned integrations with BL and what will the new API do?

Other Comments

Fulfillment

How do people manage the autorenewal workflows?
How do people manage workflows around missing items?

Other

Analytics

Primo integration and Primo issues

What advantages are there in being a Primo Direct vs Primo TotalCare customer?
UX testing

Primo Analytics - is there scope to bring Primo Analytics into the Alma Analytics?

New Primo interface – what are your rollout plans, do you intend to switch to the new Primo interface when it becomes available?
Primo Back Office – can be hard to navigate around the Primo back office.
The new Primo rollout programme – are institutions dealing with and keeping up with the new regular updates?

APIs limits – is it a concern for others? Can we take coordinated action?

Resource Management

Multiple tasks in a normalisation rule

Updating holdings info from item records – how does anyone do this?
Is there an easy way to move holdings from one record to another when one item associated with that holding is on loan or lost?
Is anyone already using the Shelf Report on Alma for stock checking?
How do people keep tabs on import profile successes?
Is anyone using Elsevier automatic updating of holdings?
Is there any way of moving holdings to another bibliographic record without having to create (or import in) another record on Alma?

Other
eResources and Community Zone

The enquirer would like to explore contributing to the CZ – how is this best approached?
The CZ’s coverage includes only about 45% of the enquiring institution’s records compared to the near-100% coverage accorded by the previously used Summon knowledgebase. Is that the experience of other institutions also?

Are there any plans to have database records in the CZ?

Acquisitions (Alma workflows)

Acquisitions (Communications with vendors, e.g. EDI/EOD)

Actions for Ex Libris

1. **Resource Sharing** - need to report back from Resource Sharing day
2. **Primo** - on going indexing would be nice more than one a day. Multi tenants to be indexed more than once a day
3. **Primo UX** - could we use the documentation centre to store Case studies?
4. **Primo API** - is there a 300K limit per day?
5. **Community Zone** - Alan Oliver (ExLibris) to chase up what the current progress is on the long-mooted setting up of the CZ Management Group
6. **Acquisitions** - The limitations of the PO lines and the export of sets – in particular the field listing the amount encumbered on the PO lines includes a currency code (i.e. states 523.24), this means that a process has to be run to remove the GBP before the spreadsheet column can be used properly. Also where this amount is in a foreign currency, a column listing the actual GBP price encumbered would be very useful.
7. **Acquisitions** - The addition of other fields for the PO sets would also be useful, such as renewal dates, or the ability to list manual or automatic renewals
8. **Acquisitions** - The ability to search for reporting codes where this field is empty would be appreciated.
9. **Acquisitions** - Claims lists which could be sorted by the expected date rather than in the alphabetical list which appears now would be very useful.
10. **Acquisitions** - The ‘select all’ checkbox only selects results on the same page. It would be good if it could work across pages or if you could select to have all results presented on the same page.
11. **Import profiles** - Problem with import and matching - Andrew Christison is taking that back to Ex Libris
12. **Multi-line ordering from Oasis** - feedback to Ex Libris - Andrew Christison will take back to product team
Customer Breakout Discussions

Resource Sharing

Note: Most of the actions from the Resource Sharing breakout were to take up issues in more detail at the Alma Resource Sharing Day arranged by Ex Libris on Tue 9th February 2016.

Is anyone report importing BL status report?
Not possible at present but hopefully will be with new API. More discussion on the topic at the Resource Sharing Meeting 9th Feb

Is anyone sending out unmediated requests generated via Primo?
No-one is yet doing this although some universities are allowing users to place mediated requests via Primo, others don’t allow requests via Primo but have created a form which can be input directly into Alma, and other have API which checks holdings and provides form to input into Alma.
The group discussed the use of Citation Linker, some had not found it useful while others seemed to be using it successfully.

Is anyone using “rota assignment” or “locate profile”?
University of Manchester tried but don’t use as found it to be unreliable. Surrey have used but had also had problems. Lancaster have only used rota to manually move requests.
Question for Resource Sharing Meeting: Can the rota assignment be automated for non ISO workflows?

How are institutions using Alma for lending?
Aberystwyth using Alma to lend. and stated that as part of the Wales consortium they had reaped benefits but that there was still a lot to be developed. Aberystwyth to circulate the workflow to the group.

Are there any further planned integrations with BL and what will the new API do?
ExLibris stated that eventually transactions with BL will operate in the same way as ISO workflow – requests will be automatically be sent via Primo, and requesters can be kept up to date on status of requests via their Primo account – staff will intervene to deal with problems. There will be further discussion on this subject at the Resource Sharing Meeting.

Other Comments
Integration of COPAC into Primo Central – no plans as yet.
Integration of BL catalogue so that requesters can search home institutions collections, Primo Central and BL.

US Libraries – group agreed that it would be useful to discuss the main difference between US and UK libraries Resource Sharing services at Resource Sharing meeting.

It was agreed that one problem and hindrance to development of Resource sharing service is that over time institutions have developed their own workarounds and have had no platform on which to share these. It was agreed that it would be good to share at the Resource Sharing meeting.

Due date for renewals – is it possible to only change in Resource sharing screen and not within fulfilment as well? ExLibris said this should be possible and they would demo this at the Resource Sharing Meeting.

Staff mediated renewals via Primo – several institutions using this.

Request limits – at present no way of resetting these annually but ExLibris planning this as future development

Latetime return of Resource sharing items – institutions manually adding renewal charges to accounts and these then automatically appear in patron account.

**Fulfillment**

How do people manage the autorenewal workflows?

This question was not actually discussed but the group did talk about the problems with the management of loan periods in alma in general.

Discussed Univ Surrey problem of all items being given same loan length over vacation and Alma not seeming to recognise 1 day loan status. It was suggested that this may be a configuration problem.

One institution highlighted another problem with the setting up of the held shelf to include dead days at the weekend – that the collection date on Alma was the Friday to get around dead days and not the following Monday as expected.

One institution reported an issue with overnight loans and said that they had to “fudge” their opening times on alma in order to create a fixed due time for overnight loans.

How do people manage workflows around missing items?

Group discussed missing item workflows;

Edinburgh Napier reported how previously (in Aleph) items could be marked as “mis-shelved” and then moved to missing status if not found, but in Alma the items go straight to Missing and they have had to create a separate location in which to store them in order to carry out the checking before adding the missing status.

One institution reported that they used work orders for mislaid items – but that this was complicated because in do this items were automatically put into transit.

Another institution discussed the fact that when items are put into transit it is very difficult to see which sites they are being moved between.

The group discussed the problem that there seems to be no way of scanning items straight from transit to missing status – that items have to be first scanned in and then made missing – and that this defeats the logic of making the item missing as by scanning it in it appears that staff have had sight of it!
It was reported that in the new Alma release it was now possible to run a report on in transit items.

Univ Surrey reported that they were having trouble locating the text of the overdue letters and that they could not find the ones they needed in the XML letter templates.

Surrey Univ reported that they had had to set up a grace day in order to avoid fines taking effect too early.

Surrey Univ reported that they had started to use auto-renewal and that it was very popular with students. They also reported that the number of requests being placed had significantly reduced and wondered how the two could be connected.

The issue of only one recalled copy was raised – Surrey Univ situation is that they issue all items for two weeks but that people who have the non-recalled copy only find out they can’t renew 2 days before. It was suggested that they set up auto-renewal to take effect a week before the due date giving those unable to renew more time to bring back the item and potential speeding up the satisfying of requests.

The group discussed the use of the average book price to deal with “lost” books.

Edinburgh Napier reported that they had a default charge of £30 but that they did check the price of each lost book – they reported that they were assessing whether the amount spent on staff time taken in finding the book price was actual equal to the amount of income generated by the lost book itself or whether it would be cheaper to just use an average price.

Edinburgh University reported that they allowed borrowers to bring their own replacement copies of lost books.

The group discussed “Claimed returned” and disputed fines workflows – Edinburgh Univ reported that they do not use this functionality and simply make the book lost. Surrey Univ reported that they give the borrower a further 2 weeks to look for the book and then charge them a standard £70 replacement charge (and waive any related fines).

The group discussed the difference between the manually added “missing” status and the automatically generated “lost” status. Univ Surrey reported that after 4 weeks an item automatically becomes lost and the borrower is charged the £70 replacement charge.

Aberystwyth reported that it was possible to run report on disputed fines (in Analytics). Another institution question the value of using the disputed fines functionality and it was explained that this allowed the borrower to continue to use the library while staff investigated the circumstances of the fine.

Other

The group discussed the Alma Reading Room functionality and it was found that only a few institutions were using this. It was suggested that an email group be formed so that these institutions could share experiences. Interested parties were Edinburgh University, Sheffield University and the National History Museum.

The group discussed the procedure for creating new users. Cumbria reported that they create the same password for all internally managed users which they then get them to change.

The group discussed online payments via WPM and it was agreed that an email group of interested institutions should be set up; Sheffield Hallam Edinburgh, Edinburgh Napier, Lancaster and Surrey all expressed an interest in being part of the group.
Analytics

1. Shared measures, it is difficult to understand what fields are shared. Evident when working within the Subject Areas. Suggested that only the fields that could be selected are shown when using a shared measure.
2. Analytics Documentation isn’t that "groovy".
3. It is possible to get local data into analytics, eg you could ask for barcode to be present in other subject areas, you just need to request this.
4. Problems with Analytics timing out and not notifying the user. User frustration.
5. Alma data analytics refresh of data, greater frequency was suggested. Majority were happy with the daily refresh of data though.
6. When new Alma customers come on line, it has been noted that existing Alma Customer's experience slower performance together with refreshment of data.
7. Events Subject Area documentation not clear, difficulty finding out what everything means.
8. Problems experienced when trying to report a count on unique e-journals. University of Surrey investigating using Open Refine, to drive this data.

Primo integration and Primo issues

What advantages are there in being a Primo Direct vs Primo TotalCare customer?

General discussion around what can/ can’t be done in Total care. The information regarding Ex Libris Cloud Service Packages - is this clear enough? Local hosted, multi tenant? Very unclear. Would like clearer documentation.

Question To Ex Libris: on going indexing would be nice more than one a day. Multi tenants to be indexed more than once a day.

Syndetics ICE doesn’t work in Multi Tenant environment - searches contents. Send to Sandra Balzer (Ex Libris) - details of what needs to happen.

UX testing

Several Universities have undertaken usability testing, for example Imperial College London, and Manchester has just begun. Can we share methodology, experience, ideas and best practices? This would be really useful. Record findings?

Sample sizes?
- SHU - Nab people. 6-8 people.
- Manchester - same group of users.

Submit case studies.

Question to Ex Libris - could we use the documentation centre to store Case studies? Which institutions would be happy to submit?
**Primo Analytics - is there scope to bring Primo Analytics into the Alma Analytics?**

Interest Days lead by John Krug? What kind of statistics are institutions creating and how are they used? Ideas on analysis you can perform once Alma and Primo statistics can be integrated.

User group to focus on this? Things you can do with Pimo analytics. John K to confirm if doing both.


**Action:** RCW to share sort of stuff sent to faculty engagement with Caroline Thorpe.

**New Primo interface – what are your rollout plans, do you intend to switch to the new Primo interface when it becomes available?**


**Primo Back Office – can be hard to navigate around the Primo back office.**

Our Collection Management team can now access some areas of the Back Office, and this makes sense as they are the experts in metadata. This means they can diagnose issues with dedupe for example. Are other institutions opening this kind of access, or would they if the Back Office was easier to master?

Equivalent Primo certification training? Update of training materials? Frustrating to know if its Alma or Primo support?

Query documentation for Primo - currency.

**Action all Tell EX libris documentation about gaps.**

**The new Primo rollout programme – are institutions dealing with and keeping up with the new regular updates?**

Manchester sometimes have multi volume problems.

No choice but to keep up if hosted.

**APIs limits – is it a concern for others? Can we take coordinated action?**

300K limit? **Action Ex Libris to confirm?**

Alma more of a problem. Is it fully thought out? based on staff user licences. 10K per library staff user licence? Look at developer network for API information.

What are the API limits? **Ask Ex Libris.** Can we use EPUG? Stephen Harding has a call with EXL- what comes out of call with Ex Libris (Newcastle) Contact all institutions to take co-ordinated action - on behalf of EPUG.
Resource Management

Multiple tasks in a normalisation rule
Alma isn’t allowing the customer to add many rules, i.e. not allowing them to add an RDA-pertinent field and subfield to one rule at the same time.

Already in progress – a Salesforce case has been raised. This sounds to Alan Oliver (ExLibris) like a regression bug.

Updating holdings info from item records – how does anyone do this?
It doesn’t appear that (m)any present have classmarks in their item records from which to update the holding.

Enquiring customer to contact ExLibris, and/or consider whether there may already be an Alma API which could achieve this.

Is there an easy way to move holdings from one record to another when one item associated with that holding is on loan or lost?
There was on Aleph, but there isn’t on Alma – q.v. Sheffield’s ongoing support case where holdings can’t be moved if any of its items are on request (Salesforce case #00141116). ExLibris insists that this requires a NER rather than a bug fix.

Anyone suffering with this issue can take a look at Sheffield’s case and decide if it resembles their own circumstances closely enough; if it does, they may me-too Sheffield’s support case and/or vote for the NER which Sheffield will be submitting to NERs cycle #2.

Is anyone already using the Shelf Report on Alma for stock checking?
Nobody appears to be yet, but the enquiring institution may like to get in touch with Sheffield later in the year, as it’s conceivable the latter might be using the report in conjunction with 3M Digital Library Assistants (DLAs) as part of the preparation for the OCLC GreenGlass pilot project.

How do people keep tabs on import profile successes?
Specifically, imports that purport to have completed successfully in Monitor Jobs but have actual issues, e.g. items not matched, holdings not updated, etc.?
No tangible actions arose from the discussion, but perhaps someone would like to raise a support case if one hasn’t been already?

Is anyone using Elsevier automatic updating of holdings?
The enquirer was invited to contact Laura Allen at LSE, as she’s currently trying out aspects of this functionality.
Is there any way of moving holdings to another bibliographic record without having to create (or import in) another record on Alma?

There is no way at present – all attendees confirmed that they are having to create records. The enquirer could always submit a NER or Idea to get the issue on ExLibris’s radar.

Other

There were questions from around the table regarding attendees’ experiences of using the Collection Resource Editor and the Digital Inventory, but no actions arose from either.

eResources and Community Zone

The enquirer would like to explore contributing to the CZ – how is this best approached?

It’s not possible to contribute original MARC records yet, but existing records can be edited for the good of the entire Alma usership; refer to the Community Zone Contribution Guidelines for the etiquette on contribution.

Alan Oliver (ExLibris) to chase up what the current progress is on the long-mooted setting up of the CZ Management Group.

Sheffield advised that they still import MARC records from the publishers of collections and delink the CZ equivalents. Any CZ updates concern the inventories/ portfolios only, so the better-than-CZ MARC record survives. Deletions are caught manually by a staff member working through the CZ task list. As there was some interest in these processes, there is an action on Sheffield to share notes on these with whoever would like them.

The CZ’s coverage includes only about 45% of the enquiring institution’s records compared to the near-100% coverage accorded by the previously used Summon knowledgebase. Is that the experience of other institutions also?

No other attendees had experienced exactly the same issue, but concerns were also raised that the CZ might not include all of the records available on EBSCO Discovery Service. Any attendee with concerns regarding the CZ’s coverage compared with the knowledgebase it’s replacing or has replaced at their institution is invited to share those experiences with a Product Manager and/or on the Knowledge Centre.

Somebody also ought to raise a NER or an Idea to push for the inclusion of a CZ collection preview option, as many present agreed that this would be very useful; it’s very time consuming to have to set up access to a collection, test it, and then find out it’s the wrong one.

Are there any plans to have database records in the CZ?

There are none, but some institutions point out that their original-cataloguing database records are too good qualitatively to ignore or be superseded by potentially inferior ExLibris- or publisher-derived examples anyway.
Alan Oliver (Ex Libris) advises that Proquest has been working on a new knowledgebase of records (including databases), which will be introduced into service with Alma at the start (Q1?) of 2017. This will be an iterative change; a monthly release, with no need to prepare. There were questions from around the table regarding attendees’ experiences of using Elsevier auto updates, Primo Central, a combined local collection + Primo Central tab on Primo and EZProxy (for off-campus authentication), but no actions arose from these.

**Acquisitions (Alma workflows)**

The session was a lively discussion which involved talking about the different aspects of the acquisitions process – topics mentioned were:

- Change vendor in order and how people were using it.
- PO sets; the limitations of these, both in the sets and the export fields.
- Issues with reports and claims processes (incl. EDI claims).
- Using the find and sort functions, particularly in the Acquisitions tasks, but also generally in Alma.
- Issues with vendors and their ability to work with acquisitions processes in Alma (plus within different libraries acquisitions processes outside of Alma).
- Working with sets and analytics (people prefer the former).

**Items to take forward to Ex Libris:**

- **The limitations of the PO lines and the export of sets – in particular the field listing the amount encumbered on the PO lines includes a currency code (i.e. states 523.24), this means that a process has to be run to remove the GBP before the spreadsheet column can be used properly. Also where this amount is in a foreign currency, a column listing the actual GBP price encumbered would be very useful.**
- **The addition of other fields for the PO sets would also be useful, such as renewal dates, or the ability to list manual or automatic renewals**
- **The ability to search for reporting codes where this field is empty would be appreciated.**
- **Claims lists which could be sorted by the expected date rather than in the alphabetical list which appears now would be very useful.**
- **The ‘select all’ check box only selects results on the same page. It would be good if it could work across pages or if you could select to have all results presented on the same page.**

**Acquisitions (Communications with vendors, e.g. EDI/EOD)**

- Workflows - can only have 1 import profile per vendor.
- Coutts document to pull best practice advice together for all Alma users as they are getting conflicting advice.
- Sussex are mapping licence data for eresources into Alma MARC record. From Coutts.
- EOD - people using Coutts,Dawson but not Askews
- PDA in Alma can be done without systems input, very easy to use.
- Dawson’s - can’t understand that not all Alma libraries are not using item Policy.
- Dawson sub-accounts aligned with Alma? Problem with . in SubAccount names
- Import profiles - Problem with import and matching - Andrew Christison (Ex Libris) is taking that back to Ex Libris.

Status updates
- Multi-line ordering from Oasis - Laura Smithson from Surrey - feedback to Ex Libris - Andrew Christison (Ex Libris) will take back to product team.
- Closing POLs is difficult
- Journal renewal - automatic or manual? Ex Libris advised manual but they go onto task list and have to be manually edited to move them off.
- Interested User - with EOD, how to get interested user or reservation added automatically? Manually adding them.
- Adding eBook URL to interested user letter? Sends link to requester when removed from activation task list. URL from portfolio.
- Letter customisation- more is possible than Ex Libris let you know at implementation stage.