

G3 Alma Implementation Project Team Reports for The RACL Executive Committee

January 27th, 2017

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Report Overview

The members of the Implementation Team, along with the functional project teams, are pleased to present this update. This report reflects the current status of each team's work with intentional focus on decisions, policies, best practices, or recommendations that change how the consortia and institutions conduct library activities. Therefore, it is important to note that the entirety of a team's work might not be represented here, only those actions which meet the aforementioned focus.

Overall, the project is proceeding as planned. However, several issues have been identified and are also included in this report.

Several of the recommendations found in this report represent radical departures from the way the GALILEO Interconnected Libraries currently operate. In some cases, the teams were required to develop these new processes and policies because of the way Alma and Primo function. In a couple of other cases, teams identified ways our system can save considerable resources if we transition to substantially different processes.

In either case, as the ramifications of these changes became apparent, we fully expect there to be some level of local concern. Local library faculty and staff roles and responsibilities could shift slightly or significantly as our institutions incorporate the practices identified in this report.

The nature of this report is high level by design. In many cases, it will be difficult or impossible for library faculty and staff to discern functional details from this update. However, with this report, we feel we are ensuring that RACL and, subsequently, our entire community are fully aware of the scope, magnitude, and nature of changes that are afoot. To ensure we are collectively on the same page, the project team leads will be presenting these findings (with a greater level of detail) to the institutional team leads during the month of February.

While the teams have worked very hard to present their findings as clearly as possible, RACL Executive and RACL may have additional questions or concerns. Please direct any inquires to Mark Flynn or project director Barry Robinson. They will schedule webinars with the appropriate team members to explore the appropriate topics in further detail.

Regards,

The Implementation Team

Assessment Team Report

Deliverables

Completed

- Survey and inventory list of reports used in Voyager
- Survey and inventory list of reports not in Voyager but desired in Alma
- Review Peer System Assessment documentation
- Provide guidance on analytics training for institutional leads

In-process

- Work with Ex Libris to build these reports in Alma Analytics for all institutions
- Monitor and Provide answers to institutional lead questions on assessment on g3instleads-l
listserv and Basecamp
- Develop Test Plan and Test Analytics in Alma Test Environments
- Determine and document any standards to be recommended system wide
- Provide lessons learned from vanguards and teams during testing phases
- Provide updates/documentation/etc. for project wiki

Need Follow-up Discussion

- Determine any additional Alma Analytics functionality that should be available and used at go
live
- Develop instructions for creating shared folders
- Create workflows for adapting template reports
- Adapt Orbis Cascades' portal for USG consortium use

Summary of Alma Analytics Findings

Initial Thoughts from Institutional Leads and Assessment Team Regarding What We Want Analytics To Do?

1: We need the ability to consistently and easily run regular reports that are done daily, weekly, and monthly

2: We need the flexibility to easily write new reports based on discrete, specific questions that may arise relative to initiatives such as accreditation

3: We need to be able to seamlessly export reports into Word and Excel formats

Assessment-Analytics Survey, Results, and GUGM Presentation

Institutional leads were asked to complete an 8-question survey to help guide the work of the Assessment Team. Results were compiled and analyzed by the team as well as presented and

discussed at the 2016 GIL Users Group Meeting. The presentation may be found online – http://www.usg.edu/galileo/gil/conference/documents/2d_Assessment_Reporting.pdf

Issues Identified After Surveying Institutional Leads

- 1: Not all persons at each institution are aware of all the reports that can be run currently using Voyager.
- 2: All persons running reports want to be able to run the same types of reports in Alma which they currently run in Voyager.
- 3: All persons want a user- friendly, printer-friendly, and customizable options for running reports in Alma.
- 4: Not all institutions have a succession plan or train more than one person to run reports if the responsible person is out of office or have vacated the position.
- 5: Not all institutions have a dedicated person to run reports and need support from GIL/GALILEO staff.
- 6: Some institutions have more than one person responsible for running reports but they all may not communicate with or know what the other is doing.

Preliminary Findings for Shared Reporting

The team is working to identify and prepare shareable reports for required external reporting, including ACRL and IPEDS. To date, the team has identified resources from California State University's Required Surveys Task Group as a basis for this effort (<https://calstate.atlassian.net/wiki/display/ULMSR/Required+Surveys+Task+Group>). These materials provide instructions for how to build reports keyed to specific questions in ACRL and IPEDS, as well as identify current limitations of Alma Analytics for this purpose. Cal State has shared draft reports via Alma Analytics, providing a basis for any new reports the team may develop (/shared/Community/Reports/Institutions/CalState/FOR TESTING ONLY ACRL queries). The target for this project is to prepare viable shareable reports for as many questions as possible in time for ACRL's 2017 reporting period.

Additionally, GIL/GALILEO has created reports to help with data validation and they could possibly be used for shared reporting. Users will need the 'design analytics' role to access the reports.

Recommendations for and Suggested Tips on How to Use Alma Analytics

Recommendations

Recommendation #1: Hire dedicated GIL Support Staff member. This person would solely be responsible for running reports for individual institutions and for consortium reports. This person will also serve as GIL liaison to the GIL Assessment-Analytics Team.

Recommendation #2: The Assessment Functional and Consultation Team shall become the GIL Assessment-Analytics Team (meeting regularly at GUGM conferences and electronically as needed).

Recommendation #3: Create a separate test environment/Alma sandbox during institutional training.

Recommendation #4: Develop schedule for Analytics training and follow the suggested outline of videos presented in Tables 1 & 2.

Recommendation #5: Adopt the shared reports presented by GIL as well as those presented by Cal State.

Tips

Tip #1 – Create folders for different library functional areas (Acquisitions, Fulfillment, Resource Management, Assessment, etc.) and “In process” folders for individuals

Tip #2 – Give reports meaningful names • Easier to identify when scanning a list • Helps distinguish similar reports (e.g. include school initials or full name and type of report compiled)

Tip #3 – Use the “Description” field to explain the purpose of the report • If applicable, state who requested the report • Add your name in parentheses, along with the date you created the report

Tip #4 – If/when creating a folder in the Community area, please consider that the purpose is to share with other institutions, not within your own. Use helpful descriptions, report names, etc. (see Tip #2)

Tip #5 – For locating reports you’ve already created, use the Oracle BI Search feature

The better, more descriptive content you add to these reports (via the name, description, etc.) the easier it will be to relocate them in the future

Tip #6 – Rename a column using “Column Properties – Column Format” tab

Tip #7 – Hide a column using “Column Properties – Column Format

Tip #8 – Use % and _ as wildcard characters with “Is LIKE” and “Is NOT LIKE” filters % = multiple characters _ = single character

Tip #9 Save Often.

Lessons Learned

Analytics data **updates** only **once per day**. Per the Alma listserv, **the important thing is that, unlike Voyager Create List, which can search for changes more or less as soon as you save them, Alma Analytics reports will not reflect recent activity until after the daily refresh.**

- Slow (not scaled for large queries)
- Cross subject searching limited (e.g. Item circulation by fund code).
- Can only export 64,000 lines at a time (hard for e-resources or large CD projects)
- No access controls: anyone can break shared reports

The comments fall within two subject areas: desires for the ability to run regular, repeat reports seamlessly, and for the flexibility to run customized reports as requested or needed. The third most important item on the “wish list” was the ability to easily export reports to Excel. In sum, can ALMA give us easy canned reports, flexible custom queries, and ready export options? Respondents want accurate reports they can readily export, and want to be able to customize the ALMA system to write their own queries.

Finally, one respondent wanted to know if ALMA has a link checker. Yes, there is supposed to be one.

Acquisitions/ERM Team Report

E-resources Consortial Recommendations

Background

ALMA presents a completely new Electronic Resource Management (ERM) model for activities which previously have taken place in multiple locations. The ALMA model includes the concept of “zones” in which records are maintained, and to which library holdings can be attached. The Community Zone (CZ) is the overall knowledge base, which could be understood as a combination of bib records and collections (Aggregator, Selective, Databases). The Network Zone (NZ) is the consortial-sharing environment, in which shared packages can be activated for individual libraries in their Institution Zones (IZs), where local holdings are maintained. In addition, unique collections of records can be loaded into the NZ for access by the consortia.

Prior to migration, GALILEO provided access to its consortial e-resource collections through the GALILEO portal, SFX, and EBSCO Discovery Service (EDS). In addition, GALILEO offered services that contain information about local collections, including the GALILEO Local Resource Integration (GLRI) system and SFX.

For the purpose of maintaining e-resources after migration, Alma replaces the SFX and Full Text Finder link resolvers. The GALILEO portal, EDS, and GLRI remain in place.

Summary

In the ALMA environment, there is a single consortial e-resource model for all institutions; that is, the institutional library manages its own locally acquired and licensed e-resources, and GALILEO manages the consortially acquired and licensed e-resources. This document will help define policies and procedures surrounding the activation of resources available in the CZ and NZ and for resources that are not.

Initial Configurations

In order to maintain a consistent approach to how institutions manage e-resources, basic configurations need to be established. The following configurations impact authentication into resources and how services and resources are displayed to the end user.

- EZproxy: Half of USG institutions maintain a local instance of EZproxy, while the other half rely on the GALILEO maintained instance of EZproxy for their institution. For this second group, GALILEO will make all EZproxy configurations on their behalf. Both Institutions with local EZproxy and GALILEO will use the [EZproxy Configuration Instructions](#) for configuration guidance.
- Link Resolver (OpenURL): Information on the Alma OpenURL used for outbound linking from other database vendor platforms is forthcoming. Institutions will be responsible for maintaining this URL with vendors that have local agreements with and GALILEO will be responsible for maintaining this URL in GALILEO vendors. In many cases there will be overlap.
- Display Logic: Configurations define when services appear in the Primo View It and Get It tab, and the order of resources presented. Display Logic rule policies for IZs and the NZ are forthcoming. [Ex Libris Documentation](#)
- Direct Linking: Direct linking enables users to view an electronic service (such as full text) immediately in the View It tab instead of having to click the service's link. There are Pros and Cons. More information will be forthcoming. [Ex Libris Documentation - Direct Linking](#)

Activating/Maintaining Consortial e-resources

Definitions

- Institutional Collections – *acquired, licensed and managed by individual institutional libraries.*
- Consortial Collections – *acquired, licensed and managed by GALILEO. These resources will be clearly branded as GALILEO. Consortial collections include both “core” collections available to all USG libraries and “cost-share” collections that are provided on an opt-in basis.*

Activation

As mentioned, Institutions manage their own locally acquired and licensed e-resources, and GALILEO manages the consortially acquired and licensed e-resources.

Both GALILEO and institutions alike will activate newly acquired e-resources when available in the CZ. Instructions and a workflow overview for major acquisitions activities are provided on the wiki in either a [poster view](#) or [printable view](#). The flowchart is modular and color coded for easy workflow identification, and contains links to relevant Ex Libris Knowledge Center documentation. This is a work in progress, so changes are to be expected.

When new resources are not available in the CZ or NZ, local collections can be created, utilizing MARC records obtained from the vendor or created locally. Institutions will need to review their e-resource collections and ensure that all local non-ALMA CZ titles/packages are activated within their IZ. Each institution will be expected to follow best practices for inventory creation and inventory control spelled out in the [GIL Libraries Cooperative Cataloging Policies](#).

Some local collections may need to be loaded into the IZ, or selective packages will require loading holdings using spreadsheet tools in the IZ (or the NZ per policies to be established). This will be a new workflow and opportunity to manage local e-resource packages through Alma. See [Bulk Import Portfolios](#). (The Acquisitions team may develop training to help with this process)

If a library has a subscription outside of GALILEO from the same vendor for the same e-resource but with different portfolios, [share the e-resource in the NZ](#) and activate the same e-resource in the IZ. The IZ e-resource would only include those portfolios subscribed to outside of the GALILEO negotiated subscription. The same e-resource would be active in both the NZ and IZ but with different portfolios.

An example would be if a library subscribes to the consortial e-resource, Sage Premier 2017, but has a locally negotiated package with the vendor for portfolios not included in the centrally negotiated title list. The portfolios negotiated outside of the central subscription would be activated in the IZ.

Review of the CZ packages revealed that some GALILEO consortial eBook and Films on Demand collections will need to be loaded into the Network Zone by GALILEO. GALILEO staff maintains a [list of packages](#) that are consortial activations available and not available from the CZ and the method used to activate.

Maintenance

Ongoing maintenance for consortial and local collections will require GALILEO and institutions to review Ex Libris' [Weekly CKB Updates](#) for new resources added to the Knowledge Base and therefore, available for activation from the CZ.

Support and Troubleshooting

In line with the model for activation and maintenance, institutions are responsible for troubleshooting all locally purchased resources, while GALILEO maintained resources are the responsibility of the GALILEO Staff. GALILEO resources will be branded with the GALILEO Logo to distinguish them from locally managed resources.

Training on the topic of troubleshooting e-resources for institutions is forthcoming as well as policies on how to correct issues with e-resources: local corrections or global corrections submitted through Salesforce).

ERM Survey

The following are the results from the ERM Survey that was issued to help determine the best migration path for institutions' e-resources:

- Do not have local resources, may need training if purchase any in future: 6
- Did not use SFX, so may need link resolver training: 11
- Unclear on link resolver training needs: 5
- Migrating Acq data: 10;
- Not migrating Acq Data: 19
- Using Acq in Alma: 23
- Not using Acq in Alma: 6

Acquisitions Best Practices Workflows

The Acquisitions/ERM Team spent a considerable amount of time testing acquisition workflows in Alma and developing flowcharts representing our recommendations for best practices.

Developed Workflows

[Real Time Acquisitions](#)

[Creating Inventory](#)

[Demand Driven Acquisitions](#)

[Purchase Orders](#)

[Activating E-Resources](#)

[Receiving a One-Time Print Purchase](#)

[Receiving a Print Standing Order](#)

[Receiving a Print Serial](#)

[Invoicing](#)

[Renewals](#)

Workflows Under Development

Display Logic

Alma Link Resolver

Catalog Team Report

Framework for GIL Libraries Cooperative Resource Management

Policies

GIL Libraries will operate under a set of policies developed and mutually agreed upon by the Cataloging Functional Project Team of the Alma USG project. These policies have largely been adapted from the Orbis Cascade Alliance policies, but have some variation for GIL Libraries. These policies should be followed carefully in order to maintain order, consistency, and reliability in the database; however, the policies should also be seen as documents to be routinely reviewed and revised as conditions for resource management change. Adopted Policies are housed and maintained on the G3 Alma Implementation Project Wiki found at <https://sites.google.com/site/usgalma2017/cataloging/network-zone-policy>.

Central Coordination

Central coordination will be essential in the new bibliographic environment. The Cataloging Functional Project Team is requesting that two full time librarians be hired or designated to provide central coordination and oversight of cataloging activities. These librarians need to be catalogers with strong technology skills.

One librarian will be needed to coordinate all authority control work. This does not mean that the coordinator for authority control will do all of the work, but he/she will be needed to make sure that all authority work gets done through various means which may include vendor loads and/or distribution of work among GIL librarians based on expertise and ability to accomplish particular tasks. Some responsibilities would include:

1. Managing authority control, distributing work among institutions, and verifying that all required tasks are completed.
2. Managing special authority control cleanup projects whether done by a vendor or GIL Libraries.
3. Providing assistance to individual catalogers requiring assistance with creating needed authority headings, including local authority records for names and subjects.
4. Coordinate the Georgia NACO Funnel for name authority headings creation.

A second librarian will be needed to manage shared policies, database integrity, troubleshooting, documentation, training, and handling other myriad problems or questions from GIL librarians. Some responsibilities would include:

1. Managing a ticketing system for questions and problems from GIL librarians. The coordinator would not necessarily do all the work, but would ensure that problems are solved as a result of her/his own work or by distributing work to GIL libraries.
2. Coordinating and maintaining shared policies, including revisions and changes as well as new policy creation as needed.

3. Coordinating needed documentation of workflows and best practices and maintaining these documents for use by all GIL librarians.
4. Maintaining a list of experts and qualifications for different cataloging areas among GIL librarians, and distributing work by expertise.
5. Fielding requests for assistance from libraries in terms of cataloging responsibilities within the consortium and rights on OCLC.
6. Coordinating record improvement endeavors whether one-time projects or ongoing work routines such as OCLC reclamation, Worldshare Collection Management, or vendor contracted services.
7. Providing or coordinating training for individual catalogers, especially those new to GIL Libraries.

The Georgia Public Library System manages their Pines System in a similar manner as needed for GIL Libraries. As an example, see <http://pines.georgialibraries.org/stafflist> for staff at the central level assigned to manage the Pines System. See also, <http://pines.georgialibraries.org/training> for types of training provide to Pines libraries. As GIL Libraries begin live work with Alma, we will need documentation similar to what can be found here for GPLS <http://pines.georgialibraries.org/cataloging-faq> . The Cataloging Functional Project Team feels that central coordination, similar to the structure provided by GPLS, will be essential to a successful single GIL catalog.

The Cataloging Functional Project Team fully realizes that an interim step for central coordination is likely required before dedicated staff will be available to assume these responsibilities. The Cataloging Functional Project Team plans to work closely with any staff coordinating at the central level both now and in the future. The interim plan is for the Cataloging Functional Project Team to provide interim coordination by dividing responsibilities and providing guidance to all libraries until an official plan for central coordination is developed and staff is hired or designated to fill these roles.

Quality of Cataloging

GIL Libraries are expected to follow national bibliographic standards and to maintain high data standards as evidenced by individual policies created for the consortium. Cataloging processes adhere to the CONSER Standard Record (CSR) guidelines for serials, and the BIBCO Standard Record (BSR) guidelines for all other formats. GIL Libraries will have mechanisms in place to assist libraries when they encounter cataloging problems out of their scope. An essential aspect of quality cataloging is the role of authority control. It is imperative that a systematic method of authority control be established and maintained. All GIL Libraries are expected to consider authority control as new records are entered into the environment, and numerous libraries may be requested to participate in ongoing authority control tasks. The Authority Control Sub-Committee has prepared a detailed analysis with 9 recommendations regarding Authority Control in the GIL consortial environment. See the full report from the Authority Control Sub-Committee here:

<https://docs.google.com/document/d/1TZQYgAPytlfTfMpxVEKdaqibhV6EvAm7NiydOd7oAj0/edit>

Managing the Single Bibliographic Record in the Network Zone

The Network Zone will contain one bibliographic record for each bibliographic entity owned by GIL Libraries. All efforts should be made to avoid duplication of bibliographic records in order to facilitate

ease of use in the public interface and in order to maximize resource sharing opportunities through GIL Express.

Once added to the Network Zone, bibliographic records are “institution neutral” and available for attachment of institution level holdings and necessary editing through OCLC by any GIL Library. GIL libraries can overlay Network Zone records by importing an improved version of the record from OCLC in cases where a brief order record exists or when the record is outdated and enhancements have been added to the OCLC master record.

GIL Libraries are expected to add all appropriate holdings to the Network Zone. If there is no record in the Network Zone for a new bibliographic resource, the library with the resource should import a new bibliographic record by locating a record for the resource in the OCLC database and importing it to the Network Zone or by creating an original record in OCLC and importing to the Network Zone. If a matching record exists in the Network Zone, the library should add holdings to the existing record, regardless of quality. If the record is determined to be a brief or deficient record, the library can overlay the record by importing from OCLC into the Network Zone.

Records for government documents will be provided by the vendor, Marcive. All GIL Libraries who are depository libraries will utilize these records to indicate their holdings. Government documents bibliographic records provided by Marcive will function in similar fashion to all other bibliographic records in that there will be a single bibliographic record shared by all libraries for a single bibliographic entity.

Special management or cleanup tasks that need to be performed directly in the Network Zone will be coordinated and performed by the Cataloging Functional Project Team or specialists drafted by the Team until designated staff is assigned for such functions. Examples of such projects might include combining duplicate records, or removing records without holdings. Cleanup projects such as these will be identified after GIL Libraries are live with ALMA in the Network Zone.

Cataloging in a Consortial and Global Environment

While GIL Libraries could begin to feel self-sufficient with local resource sharing and shared cataloging, it is important that the consortium not become insular, but rather continue to think of the wider library community in terms of resource management. A level of cooperation and shared cataloging has been in existence among libraries for many years through OCLC, and GIL Libraries should continue to operate in this spirit.

As such, OCLC Connexion is the bibliographic utility to be utilized by GIL Libraries when a new bibliographic record is required. GIL Libraries should add their holdings symbol to OCLC Connexion in order to facilitate interlibrary lending. GIL Libraries should conduct all editing at the OCLC Connexion level in order to comply as good citizens in the larger library world, preventing not only GIL Libraries from having to do duplicate work but other libraries as well. Not all libraries can edit all records in OCLC, and thus a mechanism for assisting libraries will be developed through the central management of bibliographic records in the GIL Libraries database.

This process does not apply to batch loads of records which may come from vendors or the Alma Community Zone. GIL Libraries recognize that such records are of varying quality, and that we must put pressure on vendors to improve bibliographic records provided.

Cataloging for the Future

GIL Libraries should employ mechanisms to keep bibliographic data current by cataloging with the future in mind. It is currently best practice to prepare bibliographic information for a linked data environment. In order to keep records as current as possible with linking fields, RDA elements, genre headings, relator codes, and other beneficial information, a service will be needed.

It is incumbent upon us to future-proof our records to the extent possible. While we do not know the exact course or future of the bibliographic universe in the next few years, it is clear that linked data will be a vital part of that future. We must catalog for the future, and ensure sure that our bibliographic records remain current with linking fields and not get into the mindset of protecting static data records. Several services are available to assist GIL Libraries in keeping records current and making them future-proof to the extent possible.

1. As good global library citizens in an increasingly cooperative library environment, GIL Libraries should ensure that library holdings in OCLC remain accurate, not only for resource sharing within the consortium, but for all libraries. As such, GIL Libraries should pursue a reclamation project with OCLC to verify and correct holdings for GIL Libraries as represented in OCLC. In addition, this project will assist GIL Libraries in correcting problem records in the GIL bibliographic database. All GIL Libraries should maintain their cataloging subscriptions with OCLC.
2. A one-time fee-based record back file enhancement of authority fields by a contract vendor is recommended in order to improve legacy records.
3. OCLC offers Worldshare Collection Manager Services to OCLC members. Collection Manager allows daily modifications to bibliographic records based on changes made at the OCLC level. Libraries can choose how extensive changes should be based on MARC fields by creating a profile. OCLC Collection Manager Services will be implemented to keep records current and to overlay records with changes soon after catalogers begin work in the live Alma environment. The Cataloging Functional Project Team will develop a profile and set up parameters for the service.

Fulfillment Team Report

Policies

Statewide GIL Express policies were integrated into Alma with two changes based on recommendations from the GIL Express Best Practices Group and the approval of RACL Executive Committee. These changes were in response to the most frequent patron issues regarding GIL

Express which involve having their records blocked as soon as a GIL Express item became overdue and not being able to renew it at that point.

- 2 automatic renewals if not requested by another patron
- 7 day grace period for overdue GIL Express items before blocking
- Not a policy change but a functional change addresses the current issue of items in transit too long to their pick up locations will have the patron holds dropped. The work around of calling the owning library to simulate a walk up transaction in order to get the item charged to the patron account is inconvenient to all involved parties. The Alma hold shelf allows for more leniency and flexibility in these situations as the hold does not drop and the item is not automatically routed back even though the hold expires.

Recommendations

- All institutions consider implementing the auto renewal feature to allow for consistency in user experience. This does not increase the number of renewals and does not automatically give patrons a due date three times as long. Auto renewals eliminate the item becoming overdue and possibly accruing fines if the patron forgets to renew it themselves within a set period before the due date.
- Combine the statewide Circulation and GIL Express functional committees and review and revise the charge, policies and procedures. There has been redundancy in the two committees and little documentation on governance and purpose as the system matured with Voyager. Clear direction and strong leadership and involvement will be essential in the implementation of Alma and Primo and key to improving fulfillment at all levels and communicating between frontline staff and GIL Support.

Documentation

GIL Express policies in the Fulfillment Network

Step by step workflow for placing and processing GIL Express requests

New ways our consortia will be working together

As a future possibility, Emory University also uses Alma so there is the ability to create a Fulfillment Network between them and USG. There are now configurations in Alma that allow for a more granular levels in sharing patron information which may alleviate privacy concerns.

Issues identified

- Current functionality lost includes
 - Randomized load balancing selection of the borrowing location. Expected implementation by Ex Libris is late 2017
 - Inability to block on shelf requesting/paging at the owning library for GIL Express (Patron at Institution A requests a book from Institution B to be retrieved and picked up at Institution B). This configuration is required to allow for remote requesting and pick up at other institutions (*pick up anywhere* is the Alma option). It is unlikely to cause issues as

- we expect that overwhelmingly users will choose to have the materials delivered to their home library, but it is a change in policy for many institutions.
- Inability to handle local distance learning transactions (Patron at Institution A requests a book from their library to be delivered to Institution B). This might be addressed if institutions configure pick up anywhere for their local materials. This is already in place for GIL Express to function (see above)
 - Institutional Billing procedures will need to be determined preferably by November 2017.
 - ILL functionality and integration. There are some integration capabilities for ILLiad/Alma but they have not been tested yet and will not be a solution for all institutions since many use Worldshare instead. We expect to go-live with ILL systems being run parallel to Alma.
 - Keeping up with updates that could affect both local and Fulfillment Networks. Will this be a centralized function, perhaps of the functional committee, that ensures institutions are aware of changes, solicits feedback, and makes recommendations?
 - Maintaining consistency in regards to GIL Express configurations. GIL Staff will maintain the standard at the Network Level and can push out any changes to institutions. What will the procedures be to ensure institutions are not making changes to their local configurations that affect state-wide fulfillment?
 - Reintegrating Georgia Tech with the rest of USG for GIL Express. The current plan is to add Georgia Tech to the USG Fulfillment Network but they would maintain their separate Primo. One outcome could be duplicate records displayed in results if a title is owned by both Georgia Tech and another USG institution.

Post go-live next steps

- If Georgia Tech cannot be added back to the USG Fulfillment Network before go-live, this will be a top priority
- Institutional billing processes
- ILL functionality

GIL OPAC/Discovery Committee Report

The OPAC/Discovery Committee has been meeting on a bi-weekly basis to review and plan for the implementation of Primo as our new USG OPAC. We are striving toward a configuration that is consistent between institutions and works for our patrons to deliver an enhanced discovery and delivery solution for access to library holdings.

Team Responsibilities

- monitoring list-serv and Basecamp discussions
- reviewing and addressing concerns submitted via survey or direct feedback

- reviewing peer documentation (this was crucial in the introduction of testing guidelines)

Team Decisions

- retaining the “GIL-Find” name to preserve existing “brand recognition”
- seeking a new logo to accompany the new interface
- implementing a survey to gather user feedback

Current Issues

- updating the interface based on feedback and discussion
- documentation beyond the search interface (welcome screen, GIL documentation)
- developing a policies and procedures document to formalize and record the committee’s guidelines for decision-making and processes used to do our work

There are two major issues identified in the Primo new user interface that have basically halted our Primo testing:

1. Primo New User Interface calculated availability showing a different institution than the one you are searching. This issue was first reported in early December and reproduced by multiple institutions. Ex Libris has not offered a solution during this interval of 4-5 weeks. Sales Force Case # 00368133
2. Primo New User Interface can falsely return ‘No Records Found’ after patron logs in. Ex Libris is working on this – Sales Force Case # 00383378 – here is a link to a video showing the issue.

https://drive.google.com/file/d/0B6FIJ_kjYulrQ20xeXhDZUw5Y3c/view?usp=sharing

This issue was reported in basecamp on January 17th

Testers have also identified several other ‘issues’ witnessed in Primo New UI although they are more difficult to reproduce. Therefore, the implementation team has made the following decisions:

1. Revert (ASAP) all GIL Primo Test Environments to the Primo Classic User Interface
2. Even in the event of ‘bug fixes’ to the Primo New User Interface in subsequent weeks/ we continue our course with Classic
3. Send an escalation note from Implementation Team/Lucy Harrison/Mark Flynn to Ex Libris leadership outlining our concerns
4. Notify our Institutional Leads of our decision and schedule the cutover to Classic in short order

Team Values

- collaboration
- commitment to a next-gen system that works well for all institutions and users
- transparency in decision-making
- accountability

Alma Integrations

During the first several phases of the Alma migration, GIL assisted our member libraries with data cleanup, data migration, configuration, & testing. At this point, GIL's focus for the most part has turned to the many Alma integrations that need to be functional for the May 26th go-live. This document contains details for all integrations, along with the status and plans for each. Eventually GIL will also provide more detailed documentation for many of these integrations which can be handed off to Institutional team leads, so that they can reference it for training or troubleshooting. Below is a condensed list of our integration efforts. A complete listing can be found on our project wiki.

EDS extracts

What is this: Ebsco Discovery Service maintains a set of each library's catalog data in their database. These catalogs are currently updated nightly from Voyager via a server-side script. In Alma the process is similar, but EBSCO will now be pulling the data for each catalog from Alma via OAI-PMH.

Progress: This has been tested with a small data set for Valdosta State's Alma instance. We're currently working on testing this with a larger data set. We're also working on configuring Alma to pre-process the records, adding call number, library location, and 856 links to eds-specific marc fields in each record.

The Plan: Have everyone set up and working by go-live.

GALILEO e-resource Record loads (FOD, eBrary, EBSCO eBooks, etc)

What is this: GALILEO-purchased eBooks that have been loaded into the Voyager catalogs. These need to be removed from the Alma catalogs and activated centrally in Alma.

Progress: We've been able to delete GALILEO e-resources from Alma for the most part. However we have had issues with those institutions who combined their e-resources with ours during the data migration.

The Plan: Prior to the cutover load, we will ask all institutions to migrate these locations from Voyager to Alma without re-mapping them to special locations. Then we will follow our cutover checklist to get these titles deleted and centrally activated.

Other: Ken has activated some of these resources in Alma. We have noticed that these activated resources aren't shown in an IZ search, which was unexpected.

Authentication (complete status spreadsheet is [here](#))

What is this: Each institutions' Alma and Primo instances will be integrated with local authentication systems to allow patrons to log in with their campus credentials.

Progress: We have made some progress, several Alma instances are now configured and working with their institution's authentication system, and a handful of Primo instances are also configured and functional. As previously discussed, there have been some challenges with setting this up.

Lack of access to error logs

IT staff at institutions are very busy, and it takes time to get the right person focused on this at length.

ExL support staff are also busy folks, and had been more on the sidelines when we started this process. They are much more directly involved at this point.

The Plan: The official due date for getting institutions configured is January 31st. Reason being, we would like to get the majority of USG institutions configured and functioning on external authentication prior to the in-person workflow trainings in February.

Patron loads

What is this: Students (and for some institutions faculty & staff) need to be periodically imported into Alma, just as they are now with Voyager. With Alma, the import process and file format have changed, so GIL has been developing and testing a method to convert the current Voyager import files to work w/Alma.

Progress: Kevin/Mike successfully tested process scripts last week for all insts. Email notifications are now working. Mike working on 2 options for expiring patrons. At some point we need to announce these as the primary options available at go live. Other options may become available post go-live.:

Explicit expiring of individual patrons via a file upload,

Expiring patrons a certain amount of time after they are loaded.

The Plan:

Phase 1 (NOW): As mentioned above, GIL is creating an interim patron load process using the current Voyager export files that will work with Alma. Development on this is well underway, and these new procedures are more sustainable and secure than those they replace. Every effort has been made to make this process work with little to no additional effort from institutions.

Phase 2 (LATER): After we go live with Alma, GIL plans to develop a more streamlined, uniform export/import process (meaning a process that is similar for all institutions; the current processes differ to varying degrees), capable of controlled customization (via config file so the core code is unchanged) and the potential for automation, offering libraries the ability to push their patron loads on a recurring schedule. We envision this process being much easier to manage/maintain. The plan is to implement this completely new process one institution at a time (again, AFTER we go live with Alma).

Email Printing

What is this: This is a completely new (to us) way of handling printing. For printing things like hold slips, Alma will send an email to a printer or print service, rather than directly to a printer connected to that workstation.

Progress: We've done a lot of testing, and have found that email printing in Alma can be accomplished in many different ways. Examples include: native email printing to printers with built-in email support (HP e-print), printing plug-ins for email clients like Thunderbird, and via email management software like a product offered by Namtuk.

The Plan: Namtuk is the GIL recommended printing method. The other methods we've looked at will work, but we believe the most stable consistent approach is utilizing the Namtuk automatic email manager.

Demand Driven Acquisitions

What is this: Specific titles are only purchased when it is clear that a patron wants them.

Progress: This is handled natively in Alma. See [here](#).

The Plan: Setup for this will be handled as needed by individual institutions.

New Books/New Titles list

What is This: In Voyager, this is a web page that displays titles of recently purchased books. For example: <https://gil.uga.edu/public/newbooks.cgi>

Progress: We have [found information](#) about creating a New Titles search in Alma. We have not yet tested this.

The Plan: The current plan is to put this in place for one institution and have the Implementation Team review it before putting it in place for all institutions.

Brightspace D2L LMS integration

What is This: This is an idea for a project that does not yet exist. We've talked in the past about building a D2L/BrightSpace widget that will allow Students to access their Library accounts from within BrightSpace in order to see what books they currently have checked out.

Progress: Not Started

The Plan: This is planned for after go-live.

UB Blocking emails

What is This: In Voyager, each institution receives a daily email detailing those patrons who are currently blocked due to GE limits.

Progress: Not started

The Plan: The plan is to have this functioning by go-live. This will likely be an Alma Analytics report.

Institutional Billing

What is This: Institutional Billing is the process by which all the USG institutions route funds to each other for fines that are owed when UB patrons pay their fines.

Progress: Development on this has begun, but is now on hold.

The Plan: The plan is to continue developing this after go-live. The institutional billing process is an annual process, and it is in the process of being run right now, so technically it won't need to be run again for another 12 months, but the plan is to have it up and running by November of 2017.

Auto Update of OCLC holdings

What is This: GIL currently has a script that pushes holdings to OCLC.

Progress: This has not yet been implemented in Alma

The Plan: This can be implemented in Alma as a publishing profile and will be put in place before go-live.

Approval Plans

What is This: Approval plans are methods of acquiring library materials whereby a vendor selects material for a library based upon profiles established by the Library. The vendor ships materials and records to the Library weekly.

Progress: Not Started

The Plan: We need to look into what current scripts we run (if any) to support the influx of these records. Need to check with Jim on this for sure.

Historical Voyager circulation and financial data

What is This: After go-live, we can continue to run the Voyager servers for 3 months. After that point, we're obligated to turn off the Voyager server processes. Institutions will need access to the Voyager data for historical purposes, so GIL needs to come up with a method to allow for this access.

Progress: This topic has been discussed at length, and there are several ideas for making this happen, but development work has not yet begun.

The Plan: The plan is to have a solid idea of what we're going to do by the end of May. Possible options discussed:

- Continuing to run Oracle Databases on the existing servers, thus providing access to the Voyager data through Access Reports and GIL Web Reports. The Voyager clients of course will not be functional past August of 2017.

- Migrate all Oracle databases to new hardware running Oracle, and continue providing access via GIL Web reports and ODBC.

- Migrate all Voyager data to a new database (MySQL or some other DB product) on another server, and provide web reporting capability against this new database.

Repository requests

What is This: Several institutions currently have repository request forms in Classic GIL and GIL-Find for patrons to request items from their Repo.

The Plan: This is handled natively within Alma.

Shelflister

What is This: This is a program that was set up by GIL for all institutions. It is used to help with inventory, and is typically run on an ipad or other mobile device. The user can select a book at the

beginning of a shelf and shelflister will provide a list of books in call number order, and missing books can be marked and sent to a file on the server for later review. <https://rocky.uta.edu/doran/shelflister/>

Progress: We've done some research and found a possible solution for Alma in the form of a shelf report: <https://youtu.be/oOvtk4dOZNI>.

The Plan: The current plan is to recommend usage of existing options in Alma to cover this functionality. It's possible that down the road we could modify the Open Source Shelflister code to work with Alma.

Cataloger's Toolkit, Location Changer

What is This: These are PC applications for handling various types of bulk record changes. These programs work with Voyager only and are not expected to work with Alma.

The Plan: Much of the functionality of these tools will be available natively in Alma.

MarcEdit, EndNote, RefWorks, RDA Toolkit

What is This: These are also all PC applications, but they do not directly interface with Voyager, so are expected to work just fine with Alma.

Various Marcive Processes

What is This: We currently use Marcive to keep our name and subject authorities up to date.

Progress: The cataloging group has been reviewing whether or not we will continue to utilize Marcive with Alma.

The Plan: If we do continue to utilize Marcive with Alma, GIL will work to get this integrated before go-live in May.

Mobile Apps

What is This: This integration item refers to any mobile app that an institution may have that currently integrates with Voyager.

The Plan: At this point we don't know of any institutions that have an app like this. We will ask folks at a future inst lead meeting to be certain.

Bowker Book Analysis System

What is This: Bowker Book Analysis System is a powerful collection-analysis tool and an essential resource for academic librarians to electronically compare their library's collection against Resources for College Libraries (RCL). This customizable, self-service analysis tool eliminates tedious manual comparison via customized reports for data cleansing and management, and instant identification of the gaps and overlaps in your collection—so you can make better informed selection decisions.

<http://www.bbanalysis.com/>

Progress: Not Started

The Plan: A GIL staff member will research and test integrating this with Alma and can provide assistance with setup for any institution that would like to use it.

GIL Web reports

What is This: The GIL Web Reports are password protected web pages which GIL member library staff can use run queries against the Voyager databases. Every institution currently has their own instance of web reports. For example: <https://gil.uga.edu/reports>

The Plan: There is no plan to re-implement these for Alma.

Peoplesoft

What is This: Peoplesoft is a software tool that relates to finance and human resource. Eventually all USG institutions will be using peoplesoft for their financial systems. UGA is in the process of migrating to this solution now.

Progress: Not Started

The Plan: GIL needs to research how to set up the peoplesoft integration for Alma. This will need to be in place to process checks for UGA, but not until mid-2018. There is some information from other Alma customers about how to integrate this posted on the [ExL Developer Network](#) blog.

Media Scheduling

What is This: This is a Voyager client for lending out items like laptops, iPads, etc.

The Plan: This is handled within Alma.

Galileo password display in My Account

What is This: Currently Patrons can log into Classic GIL or GIL-Find and see their corresponding institutions' GALILEO password.

Progress: Work on this has begun

The Plan: There are two options being considered for this:

- Show the password in the My Account section, similar to how it works now in GIL-Find and Classic GIL. This is the preferred method.

- After logging into Primo, provide a link to an external page that will display their password.

GALILEO authentication from links in Primo

What is This: Currently in GIL-Find, when you log in and then click on any GALILEO e-resource link, you go directly to that resource without having to log in.

Progress: Some research has been done on this, and it appears that we can not implement this for Alma. However, this is not a big deal if we can implement GALILEO auto-login for Primo. See the next section for more details on this.

The Plan: At this time we do not plan to implement this. Again, this shouldn't be a problem if we can implement GALILEO auto-login.

Auto login to GALILEO from Primo

What is This: This is something that we have in place now for D2L/Brightspace that we would like to pursue with Primo. When a student logs into D2L/Brightspace, they are automatically also logged into GALILEO. This allows them to access any GALILEO resources without having to log in again.

Progress: This is in the planning stages

The Plan: The plan is to research whether or not this is possible, and if it is we'll set a timeline, but it isn't likely that this implemented until after go-live.

EDI Integrations w/Vendors (Acquisitions)

What is This: This refers to automated connections between book vendors and the ILS.

Progress: Some research has been done, but GIL has not yet done any testing.

The Plan: The plan is for GIL to work with a single institution to perform testing with a single vendor. The primary purpose of this is so that GIL staff can become familiar with this integration so we can assist GIL libraries with setting up these connections. We have had a meeting with the folks at GOBI about possibly using their API to connect with Alma, but there is an associated cost for this.

Illiad Add-On

What is This: The Illiad add-on for Alma is an NCIP Client created specifically for Alma that allows for ILLiad to communicate with Alma via NCIP protocol. This add-on was created by the Atlas Systems, the developer of Illiad. More information is available [here](#). Not that Atlas has also created a Primo add-on that runs on the Illiad side of things. More info on that is [here](#).

Progress: Not Started

The Plan: The plan is to wait on implementing this until after go-live.

Self Check Stations, RFID Checkout system (GGC)

What is This: Several libraries have self-check stations that allow Patrons to check out their own material. One library (GGC) has a special self check system that uses RFID rather than typical scanners to check out items.

Progress: GIL has successfully tested GGC's RFID scanners and is in the process of setting up meetings with other institutions to test out their self-check stations.

The Plan: The plan is to meet with each institution separately to get their self-check stations tested out with Alma well before go-live. GSU is the next institution GIL will be working with.

Google Scholar

What is This: Google Scholar provides a simple way to broadly search for scholarly literature. You can search across many disciplines and sources: articles, theses, books, abstracts and court opinions, from academic publishers, professional societies, online repositories, universities and other web sites. As far as how this currently integrates with our systems, there is an Exlibris/SFX program called

export.cron that runs every morning at 3:30am which creates files that Google retrieves for import into Google Scholar. Not all institutions participate in this. It looks like 9 institutions currently participate:

- Armstrong University
- Augusta State University
- Bainbridge College
- Columbus State University
- Fort Valley State University
- Georgia College & State University
- Georgia Highlands College
- Kennesaw State University
- Savannah State University

Progress: We have not yet set this up in Alma, but we've researched how it's done. More information is [here](#).

The Plan: The plan is for GIL to test this for one institution so that we can then help the other institutions get set up.

Spine Label Printing

What is This: There is not a native way to print spine labels in Alma. There is however a PC application provided by the ExL Developer Network that integrates with Alma, called SpineOMatic.

Progress: SpineOMatic API keys have been set up for all institutions, and GIL has provided a [quick start guide](#) to help institutions get set up. Recently SpineOmatic has stopped working for all institutions. GIL has opened a Salesforce ticket (case #00374990) with Ex Libris to get this resolved.

The Plan: The plan is to get this functioning again. After that it can easily be set up by each institution using the quick start guide.

Librarian Chat

What is This: Librarian chat is a javascript widget that appears in GIL-Find. It allows patrons to chat directly with reference librarians. This chat widget is accessible via a link labeled "ask a librarian". For several institutions that use this, the chat widget also appears when the patron's search achieves zero results.

Progress: Several GIL Staff have been working on customizing Primo. A proof of concept of Librarian Chat in the process of being set up in a development environment.

The Plan: This is expected to be functional in at least one test environment in early february (or sooner). Then we will deploy as needed for each institution prior to go-live.

OPAC Survey (permanent, for patron feedback)

What is This: This is a feedback survey currently hosted by surveymonkey used to gather feedback for GIL-Find.

Progress: Several GIL Staff have been working on customizing Primo, and they have successfully added custom links.

The Plan: GIL will work with the OPAC committee to determine where to place the link to this survey.

OCLC Connexion

What is This: OCLC Connexion is a PC client that lets you create and edit bibliographic and authority records and then push them to OCLC. It also allows for finding records in OCLC, editing them, and pushing them to Voyager/Alma.

Progress: Connectivity between connexion and Alma has been tested. Institutions like UGA have tested this fairly extensively. Also, the cataloging committee has been working on related policies for utilizing connexion with the Network Zone.

The Plan: The plan in terms of member libraries setting up the connexion client is to provide them the instructions that Ex Libris supplied to us so that they can set this up, and GIL will provide support if it is needed.

Primo Customization

What is This: This refers to making customizations in each institution's Primo instance, including "branding" - adding logos & school colors, and other institution-specific modifications.

Progress: Several GIL Staff have been working on customizing Primo. Mock-ups for custom Primo views have been made and are currently being reviewed by the OPAC committee.

The Plan: The plan is for GIL to have each institution's Primo instance customized with logos and an accent color for go-live following the OPAC Committee's proposal. Further customizations will occur post go-live.

BX Recommender

What is This: BX Recommender is a service that helps patrons discover literature relevant to their searches. These recommendations are based on the usage of researchers, and starts from the article the user is looking at, checking what other articles were used together with it, and then displays a listing of those articles. It is not currently in use in our current OPACs.

Progress: Researched, but implementation not started.

The Plan: The plan is to enable this in Alma post go-live.

If anyone has any integrations that need to be added to this list, please let us know.

Cutover Plan

The key cutover dates of our cutover to Alma are listed below. The implementation team has presented these to the institutional leads on January 10th and will be providing them with additional details as we proceed onward to May. Please meet with your institutional leads and make sure you are briefed on each of these items.

- January 2017: Institutional Leads to work with Library Directors to develop a campus communication plan (implementation team will provide monthly communication examples)
- 02/10/2017: Finalize first pass of workflow/primo/printing testing
- 02/14-16/2017: Onsite Workflow Workshop (all leads required, limited space for additional attendees available)
- 03/31/2017: Institutional Leads Finalize Training Plans/Materials for their institution
- 04/01 – 04/28/2017: Training Period for Institutional Leads/designees to deliver training to institutional stakeholders
- 04/14/2017: Institutional Leads deadline to submit final migration forms
- 04/21/2017: Final Voyager data cleanup deadline
- 04/24/2017: Technical Services freeze begins in Voyager
- 04/28/2017: Institutional deadline to finalize configuration changes in Alma
- 05/01/2017: Cutover Begins (Alma Test Environment Data Erased/Configurations Persist)(Access to Alma disrupted)
- 05/21 – 05/25/2017: Institutional Data Acceptance/Once Accepted Technical Services can begin in Alma
- 05/22 – 05/25/2017: Fulfillment Freeze in Voyager / Offline Circulation in Alma
- 05/26/2017: Go Live
