

9-1-2016

Systems and Collections

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Recommended Citation

Ojennus, Paul , "Systems and Collections" Whitworth University (2016). *Library Retreat*. Paper 4.
http://digitalcommons.whitworth.edu/library_retreat/4

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Systems & Collections

2016 Annual Retreat
Whitworth Library

Primo

- What's new
 - Primo now delivers Alliance and Summit content
 - Alliance ebooks
 - Included in the “Whitworth” scope (and everywhere else)
 - Ebrary collection virtually the same as before
 - DDA titles
 - Evidence-based titles (Wiley)
 - Course reserves tab (note search by instructor and class)

Primo

- Customization
 - Customizations from discussion last spring
 - Primo branding removed, always “Whitworth Library Search” or “Library Search”
 - No scrolling on landing page
 - Search Whitworth scope by default
 - Please monitor how this works for our patrons; other Alliance libraries have suggested including Summit materials here
 - Labels and tooltips
 - Hours cleaned up

Primo

- Additional customizations
 - Whitworth favicon added, page titles to “Whitworth Library Search”
 - “Buttonized” Sign-in link in Get It tab
 - Customized services page formatting
- If anything doesn’t work or patrons tell you it’s confusing, let me know
- Print journals not included in “Journals by Title”
- Dodginess of link resolver, esp. when it does not find a record

Alma

- Went live 6/28
- Sign on with Whitworth single sign-on as of 8/15
- Acquisitions
 - Continue work on integrating database management in Alma
 - Serials require further cleanup
- Collection management
 - Work orders: if something is NOS, Primo should provide a brief note, but you can find details in Alma https://na01.alma.exlibrisgroup.com/mng/login?institute=01ALLIANCE_WW&auth=SAML
 - Continue work on cleanup of ebook records

Alma

- **Fulfillment**
 - Faculty/staff records now loaded from SIS
 - All Whitworth user records updated daily
 - Summit lending/borrowing operational
 - Course reserves discoverable through Primo
 - Walk-in borrowing with Gonzaga on hold (ExLibris says it can't/won't do this)
- **Student workers**
 - W/SAML authentication, no problem to add Alma roles for student workers, just let me know what you need
- Alma continues to have monthly updates, so watch for news on those

Analytics

- Takes the place of Access Reports in Voyager
 - Still in process of reproducing our Voyager reports
 - Analytics is available to everyone
 - Not *everything* is possible in Analytics
 - Granularity is limited (e.g., we couldn't query items with work orders where work order type = preservation and work order status = water damage)
 - Not all fields can be linked (e.g., item-level data is not available for a query on course reserves)
 - Alliance will be hosting 2 Analytics Hackfests this fall at EWU

Primo Moving Forward

- The new Primo interface will be available from November
 - Our goal will be to implement by Summer 2017, have ready to replace current interface Fall 2017
 - Can view at: <https://alliance-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=WW>
- Continue to refine current UI in the meantime
 - Esp. mobile version
 - Note refinements available at <https://www.orbiscascade.org/primo-toolkit/>

Alma Moving Forward

- Change in goal:
 - In implementation our goal was usually “How can we make this work (at all)?”
 - Going forward we want to think “If I could make Alma do anything I wanted, how would I make it work to best fulfill the library’s mission?”
 - Is there some repetitive task that we ought to be able to automate?
 - Is there something we’re doing now that’s standing in the way of providing the services we want to provide?
- Note opportunities to ask for things from Ex Libris:
 - Through ELUNA voting in the spring (NERS)
 - Ex Libris Idea Exchange

Analytics Moving Forward

- In Voyager, librarians did not have access to Access, everyone has access to Analytics
 - But feel free to ask me to set up what you need also
- How can I use this to work better?
 - Usage analysis for selection and deselection
 - Coverage analysis for selection
 - User analysis as a talking point with liaisons
 - Instant access to budgets and expenditures

APIs

- Most data on Alma is query-able through APIs
 - Journals list integrating print and electronic journals
 - New books list
- These are perhaps more of a long-term project?
 - Would require access to a server, even if front end is finally parked on LibGuides

Collection Management

- Impacts of Summit
 - Last item policy
 - Voluntary 3-copy threshold
 - Consider adjusting our thinking about selection to focus more on building unique parts of the collection
- Ebooks
 - Push to develop our ebook collection beyond the packages
 - E.g., are there titles that we expect to be used particularly by non-traditional students?
 - Is the ebook less expensive?
 - Note new pricing model: Concurrent Access Model