



LIBRARY SERVICES

PROVIDING LIBRARY SERVICES FOR FLORIDA EDUCATION

Update from the Executive Director

September 2021

Hello Everyone,

Fall is officially upon us! I hope that all of you are getting familiar with Alma and Primo. Implementing a new library services platform across an entire library consortia is no small undertaking, and it will be quite some time before everyone is fully familiar with the features, functionality, and adjusted workflows of the new system.

I hope that many of you have been able to participate in the Fall Workshop series on Alma and Primo

(<https://falsc.libguides.com/ILS-Implementation/fallworkshops>). This series of workshops has been incredibly informative about multiple areas of the new system! As you'll see on the LibGuide, the Workshops continue through October 7. If you are unable to attend any of the Workshops, FLVC staff are making recordings of them available at <https://falsc.libguides.com/ILS-Implementation/fallworkshoprecordings>.



More information on many aspects of the new system is also available on the FLVC website in a series of Alma and Primo LibGuides: <https://falsc.libguides.com/AlmaPrimoGuides>. These guides cover many areas of the system, and the information presented there was designed in large part to answer questions that have arisen from our member libraries.

I hope that everyone's fall semester is off to a successful start! We look forward to working with all of you throughout the course of this academic year.

Thanks,

Elijah

Governance and Advisory Processes

To download materials from past MCLS and Executive Committee meetings, go to [FALSC.org](https://falsc.org). The next MCLS Executive Committee meeting is scheduled for October 21, 2021. The next MCLS meeting is scheduled for December 2 – 3, 2021. Both meetings will be held virtually

Library Support and Training

OpenAthens

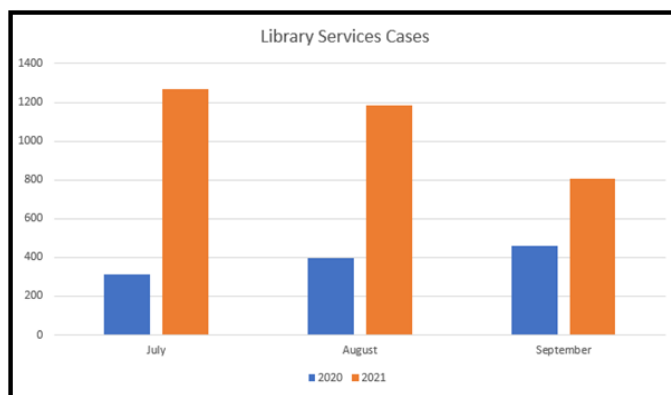


We have a final four schools in the queue for OpenAthens implementation. Florida Poly, USF, New College, and FSU will begin working on their vendor templates for vendor outreach as soon as Alma cleanup and other early fall activity calms down.

FLVC has an updated process for tracking down and Athenizing any remaining MARC records still using EZProxy for linking made possible by Alma. You can follow along with our internal process here if you like:

https://flvctest.sharepoint.com/:x:/s/ILSImplementation/EUW2s2vciGhLs8g3-gJJpzwB1bNhbGfQ0luWpQ_kNmlzw?e=2ARFGr

This ingenious and efficient process innovated by the ILS unit involves doing searches to locate URLs in 856 fields that have EZProxy prefixes or syntax in them based on what we know about different vendor permalink styles. Then we create a local collection in Alma to corral them by vendor and URL style. Exporting the portfolios of this local collection to a spreadsheet allow us to Athenize the URLs in bulk then import them back into Alma. The new URL then becomes a static URL for the portfolio that will take precedence over the MARC 856. The entire collections linking parameters will apply the OpenAthens redirector or any customer IDs needed to build the linking and the portfolio will then work in Primo via OpenAthens.



Cases received at the FLVC Help Desk in Library Services.

Comparison of the last three months from 2020 and 2021.

Integrated Library Services

Ellen Bishop: Director of Integrated Library Services

Alma and Primo VE Implementation

The Alma/Primo VE Implementation Project with Ex Libris officially ended on September 21, 2021! It has been over two months since the Alma/Primo VE Go Live on July 13, 2021. FLVC has now Switched to Support with Ex Libris and we go into Ex Libris' regular support with all the other North American customers.

Sunsetting the Organizational Framework for the ILS Implementation occurred at the end of August and was approved by



the MCLS Executive Committee since the various groups were formed for implementation, and we are now live in the new system. All the Working Group members have moved from WG listservs to the respective subject area listservs in order for the important discussions/questions to continue.

Open Office Hours

- Technical Services Standing Committee: Wednesdays from 10:00 - 11:00 am ET.
- Alma Acquisitions and Serials: Fridays between 3:00 and 5:00 pm ET.
- User Interfaces Standing Committee Primo Office Hours: First and third Monday of the month from 1:00 - 2:00 pm ET.
- Resource Sharing Standing Committee: Third Wednesday of the month from 2:00 - 3:00 pm ET.

Ex Libris staff are presenting the **Fall Workshops for Alma/Primo VE from September 7 - October 7**. Topics were suggested by the Working Groups and questions submitted by library staff. The areas covered in these new workshops are: **Managing E-Resources, Primo VE, Managing Physical Resources, Cataloging, and Alma Analytics**. Recordings are available on the [Fall Workshops](#) LibGuide page.

Visit our new [Alma/Primo VE Resource LibGuide!](#) The [ILS Implementation LibGuide](#) will continue to be available, but will become static as the implementation project is now completed. The new guide will include Information and announcements about our new Alma and Primo VE services, instructions on how to perform various functions or set up new services, and links to documentation, online training courses available from Ex Libris, FLVC, or other institutions currently using Alma and Primo VE. The new LibGuide is a work in progress as we will constantly be adding new information. Please visit often and **send us your local documentation/workflows so we can add them to the site.**

E-Resource MARC Record Loading

Working on process for loading E-Resource MARC records into Alma, by placing them into Collections. This method provides an excellent way to keep track of vendor records, and manage any deletes, updates, etc. We are currently using this loading method for records from EBSCO, Films on Demand, JSTOR, Gale Virtual + Literary Criticism, Overdrive, and Rittenhouse, among others.

Alma SIS Loads (Patron load) schedules

Alma's SIS Load process makes it easy to adjust the job schedule. The jobs can be set to run:

- Every 6 hours starting at 04:00;
- Monday at 02:00;
- Every day at 02:00, 03:00, 05:00, 07:00, 11:00, 16:00, or 18:00.
- We can also run a load manually if needed for different situations, such as the start of a new semester.

Acquisitions

- EOD/EOCR

FLVC Library Services is continuing work with libraries to implement EOD/EOCR and overlay marc record loading in Alma.

In Aleph fund codes in the vendor-provided marc (981\$b) needed the fiscal year extension; in Alma, the fund code must *not* have the fiscal year extension. (e.g. "BUDGET" instead of "BUDGET-2021")--fund codes will need to be updated with the vendor before PO lines will load correctly.

Inventory update records (i.e. overlay records with barcodes for shelf-ready items) must match on the

PO line ,the incoming overlay marc records must contain a vendor reference number ("YPB order key" for GOBI).

Fulfillment

- Fulfillment notes for Lost and Claimed Returned Items

Currently it's not possible to have pop-up notifications when Lost or Claimed Returned items are returned using the "Return Item" function. The feedback message is easy to overlook.

We have created an API that finds all items that have been assigned Lost or Claimed Returned, and added a fulfillment note to the item record. When the Lost or Claimed Returned item is returned, a pop-up will display which requires staff to click on before proceeding. After the return is complete, a second API removes the Fulfillment note.

Resource Management

- Item Description Templates

Item Description Templates set rules generating the Item Description fields based on data entered in Item Enumeration and Chronology fields. FLVC Library Services has setup templates to handle common English captions and months in the Network Zone configuration area and has pushed these to all Institution Zones. This is a work in progress and templates for other common enumeration/chronology scenarios will be added.

- Enumeration H Data Removal

Many items for SUS libraries migrated with legacy data from our former NOTIS library system in the Alma Enumeration H field. Ex Libris migration staff reported that this data interfered with Alma and Primo VE functionality. After determining that this data did not serve any meaningful purpose in Alma, it was decided that the best course of action was to remove Enum H data from the fields. This work has been completed for all SUS libraries.

- RapidILL Holdings Extracts

FLVC has been begun the process to setup holdings updates for RapidILL. Updates for print and electronic journals, and print book data are all being explored. FLVC Library Services staff will be reaching out to our RapidILL contacts with more information soon.

- Bulk Scan-In Cloud App

The Bulk Scan-In Cloud App has been made available for activation through the Alma Cloud App Center. This app enables staff to use a file of Items as the input for the Scan In functionality in Alma. You can find more information on installing and using the app at the [Ex Libris Developers Network](#) site.

UBorrow

- Make the Volume field on the UBorrow request mandatory

Currently, in Primo VE, 1) there is no way to present patrons with a list of available volumes to request, and 2) if the patron does not choose the desired volume, Lenders will have no idea which items to ship.

We are working on making the Volume field mandatory, and including text asking patrons to enter the desired volume(s). We will also pre-populate the Volume field with "NONE" so that the request can be submitted without patron intervention, for the majority of requests that do not involve multiple volumes.

FLVC Library Services will soon start working on the process to add this new functionality to all UBorrow Request forms.

More details can be found at the [Alma Resource Sharing Guide](#).

- Add OCLC Sumbol to Slips

Searching for Library addresses in the new UPS CampusShip is difficult without using the OCLC symbol.

FLVC Library Services will be adding the OCLC symbol to the following slips: Borrowing Return slip & Lending Shipping and Resource Request Slips (from Pick from Shelf).

FLVC Library Services is in the process of adding this new functionality.

- "Assigned TO" Analytics Widget

If your library routinely assigns UBorrow requests to staff to manage, you may want a report to help keep track of the requests, the request's status, who it assigned to, the campus location and associated dates. This is especially useful at institutions with multiple campuses.

FLVC Library Services can assist with creating the Analytics report and adding it as a widget to your Alma main page. Please send in a [Help Desk](#) request, if desired.

Electronic Resources

Rachel Erb: Director of E-Resources

Statewide Collection 2022

Many of our negotiation activities are completed, but there are a few key packages and resources that are still in progress. At the September MCLS meeting, the Members Council voted to accept CMESC's recommendation to accept ProQuest's three-year proposal that locked in favorable subscription prices. We will continue to work with the CMESC throughout our pending negotiations.

ProQuest EBooks:

We are pleased to announce that the Packt and Rowman & Littlefield E-Book titles are now available in Alma/Primo EV for each institution. We are appreciative of the assistance we received from ProQuest and ExLibris in providing seamless access.

Group Licensing 2022

We've received most renewal quotes from vendors and publishers for 2022, but there are few publishers that have not provided quotes yet and we expect to have them by the end of the month. As we receive these quotes, we will continue to "push out" availability notifications via Consortia Manager.

Here is our timeline:

- Vendors contacted for renewal quotes: **July 7th -->10** business days deadline
- Kickoff --> members begin requesting renewals and/or reviewing obtained renewal quotes and new quotes: **Monday, August 2nd**
- Colleges and universities review their subscriptions, renewals, & newly added in Consortia Manager.
- Final decisions from members: **Deadline, Friday, October 15th**
- Please notify us in advance if you cannot meet the final deadline
- Pricing may change based on participation.
- Order confirmations for members to sign and return to us: Distributed by **Monday, November 8th**

- **November 22nd:** Invoices sent to schools (goal). Invoices will be sent as letters of intent are returned to FLVC.

We decided to extend the deadline for final decisions by an extra week!

Digital Services and OER

Rebel Cummings-Sauls: Director of Digital Services and Open Education Resources (OER)

Digital Services

Florida Islandora (FL-ISLANDORA)

We encourage all members to try out these digital asset management systems as we look towards the future after Islandora 7. Please take notes and screenshots of your experience as these external sandboxes are wiped clean on regular schedules. Join the next [DISC meeting](#) to discuss and share your feedback.

[Islandora Sandbox](#)

[Dspace Sandbox](#)

[Samvera Presentations and Demos](#)

Open FL

OER Review Standards and Approval Rubric

We encourage you to share and use this resource over the next couple of months to provide local feedback and input on this draft. All suggestions and comments are welcome and appreciated. Our goal is to provide a uniform tool that we can all use together, so let us know how this does or does not work for your local environment. If possible, please send any feedback and input on the first release by the end of October.

OER Review Standards and Approval Rubric: United States Edition

ZTC Course Indicator

A Zero Textbook Cost icon may be placed with any course section requiring course materials at no cost to students. Institutions are now able to add the ZTC indicator to their courses loaded into FloridaShines; students will be able to discover and filter by this indicator on October 1st. We invite and encourage you to learn more:

- [Definition](#)
- [FAQs](#)
- [Resources](#)
- [Workgroup](#)

If you would like to know more about supporting the addition of the ZTC course indicator for your institution's courses please contact our help desk, help@flvc.org.

Contact Details
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