

Summary of Roundtable Discussion: Physical Resource Management ELUNA 2023

Part I: Introduction

The physical resource management product team, including Product Manager (Lili Daie) and Product Owner (Hadas Granot) were present. The purpose of the roundtable was introduced: Listening to libraries' needs and understanding their physical item creation and management workflows better, in order to plan coming enhancements on our roadmap.

Part II: Open conversation

Attendees were welcome to share their workflows and raise anything they'd like to share with the PRM product team.

Part III: Questions from the product team

Several questions were raised in order to get more information on libraries' needs for our roadmap plans:

1. What are your main workflows for item creation?
 - a. Import (shelf-ready or other) – this is a great workflow according to some customers, who enjoy being able to create items in batch. Some customers create many of their items using EDI import, which creates the POL, bib and inventory.
 - b. POL – for some customers, 90% of items go through POL workflow, and it got good feedback.
 - c. Prediction patterns – this is used by customers when creating items for periodicals, though has some challenges when POLs are cancelled (see more details below).
 - d. Quick cataloging (add items from circ desk, scan in, resources menu) – this is used often, but some customers avoid this due to work orders generated (see more details below)
 - e. API – got good feedback as a way to create items in batch.
 - f. Manually adding items – this is often done when creating items in special collections (e.g. music, stamps, foreign language collections...). Special collections can have their own rules on how to handle items, each one enters the items differently, so automated processes may not fit. It is the most time-consuming workflow, and there's also not always records available for copy-cataloging and original cataloging is required.
2. What are the most time-consuming parts of item creation and management? Are there such steps that you feel could be efficiently automated?
 - a. Quick cataloging ("Add item"):
 - i. Quick cataloging automatically creates a work order, which not everyone use (since managing the work orders and transit workflows and items can be hard, and if you miss a scan items can get stuck in process). If you don't use work orders, automatically generated ones could also "spam" the requests list and interfere with workflows at the desk. This is causing some libraries not to work with quick cataloging.
 - ii. Quick cataloging doesn't support multiple material types, and is not customizable – leading to extra work.
 - b. Transiting items between places can be cumbersome for institutions where staff works in separate departments and having to frequently change currently-at. Adding work order types to the circulation desk is not always an option, since it would mean

seeing work order requests in the same place as patron and RS requests and could be challenging to the circulation staff.

- c. Acquisitions workflows:
 - i. For periodicals where POL was cancelled since the subscription was stopped, but last few items are still coming in, it's hard to manage those items, and you have to add them manually.
 - ii. Item records created by EDI import are always created in process, and if you don't use work orders you need to mark them as available by removing the process.
 - iii. In the receiving workbench, when looking at work order statuses – you can't see custom statuses in the receiving, only the OTB statuses, which makes work more cumbersome.
 - iv. When creating inventory using POL, there are some things you can't change in the template, which affects the ability to create a holdings record with a call number.
 - d. Shelf report's dependency on location is challenging for libraries that co-locate locations (e.g. Oversize is its own location due to different call number and fulfillment, but shelved with regular collection, below the shelves). Using Alma to generate an inventory list will produce either regular or oversized. Other examples are shelving course reserves with regular collection, reference books mixed in with the general collection, or circ desk locations.
3. Anything else that you would like to raise while you have us here?
- a. When adding a brief bib to create a POL, Search Resources in OCLC often doesn't find results unless you manually delete ISBN, author and publication date from the populated data.
 - b. In the ACRL report of item counts, in the bibliographic material type, Serials include serials but also periodicals. Is there a way to separately define periodicals and monograph series and serials series?
 - c. When cataloging special archives, it's sometimes hard to decide if materials should be digitized as well, and advice from the community would be helpful (referred to Alma-L, to reach the helpful Alma community, and also suggested looking into Alma-D to maintain digital files where needed directly in Alma, without needing to set up and maintain another system).

Part IV: Discussing Item Templates

Alma's roadmap plan for creating items using item templates was introduced, to get feedback. The general feeling was that this would increase efficiency of creating items, and helpful to the library. Some things that came up that would make this more helpful (we can't promise to do everything, but we would like to understand the needs):

- Personal preferred template – when working on special collections, items data and handling can differ a lot between collections, so having an institutional default would not be suitable. If the system remembers your preference, that would be helpful.
- When adding a new item in a workflow that also adds a new holdings record (possible in quick cataloging & POL), it could be helpful to also allow selecting the holdings template to use.