Alma Roadmap Highlights 2016-2017
Alma Acquisitions

Yoel Kortick | Senior Librarian

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Patron Purchase Requests

- April 2016: Libraries benefit from end users being able to initiate the ordering process
- Institution faculty as well as students take an active part in the acquisitions selection process

- Patrons and faculty can perform a "Purchase Request" from within Primo discovery interface
- The purchase requests automatically get entered into a task list in Alma
- The purchase request is an order, and once approved enters the standard ordering process

https://www.123freevectors.com/free-vector-2016-calendar-april/

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Patron Purchase Requests

Alicia Chen ☆ e-Shelf My Account Sign out

Find Databases | Library Search | Collection Discovery | Citation Linker A to Z | Help | Language: English⌄

Citation Linker

Journal	**Book**	Article

Book Title: Knowledge manageme

Date (YYYY-MM-DD):   ▦▼

Volume:

Part:

ISBN:

Author Last Name: Safransky

Author First Name: James

Author Initials:

Publisher: J and S Press

Go   Clear

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Patron Purchase Requests

Ability to contribute vendors to NZ
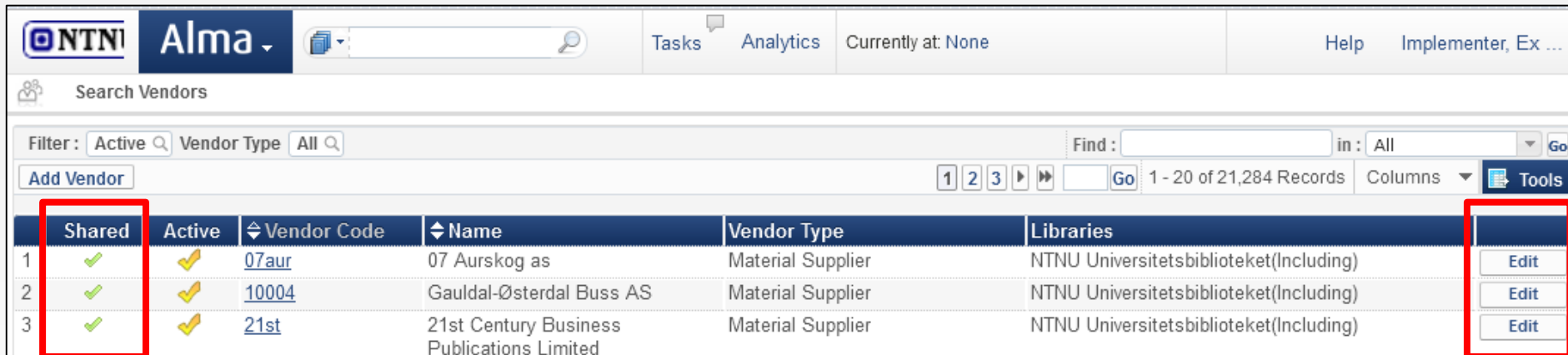
June						2016
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- June 2016: Allows a consortia to better collaborate in order to create and manage a shared vendor list.

- Alma already provided a means for administrators of the Network Zone to push global information of a list of vendors to member institutions in the collaborative network.
- With this development members of a collaborative network can share or edit global information about vendors managed in the Network Zone.

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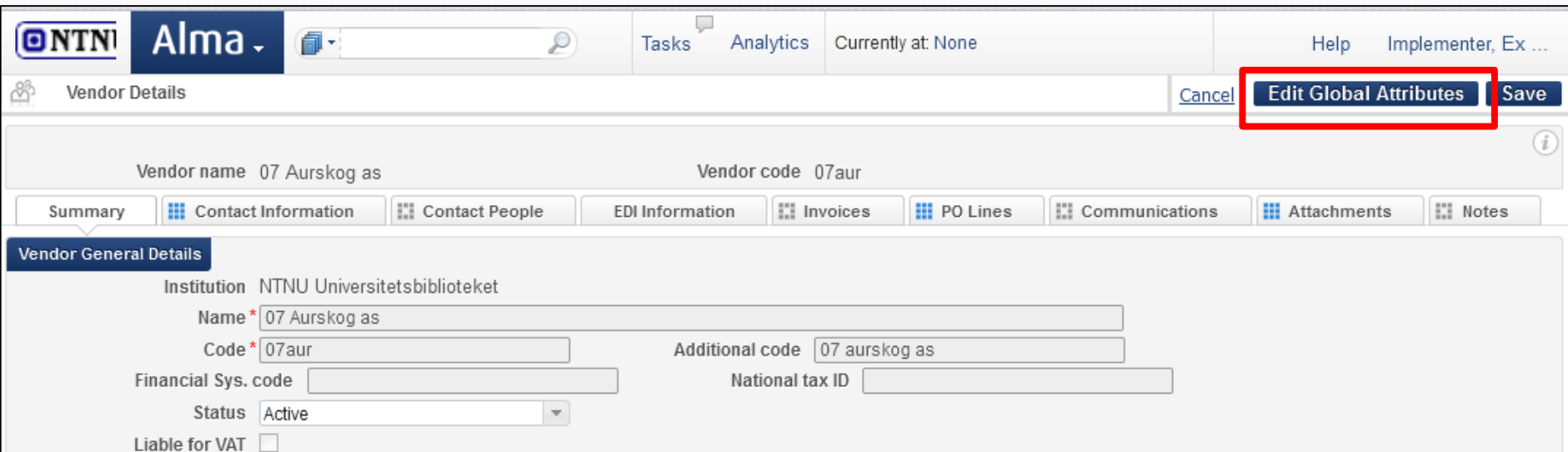
Ability to contribute vendors to NZ

- Editing a shared vendor from within a member institution

Ability to contribute vendors to NZ

- A vendor that it not yet shared with the network can be contributed to the network

Item search in Amazon

July						2016
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- July 2016: Instead of placing an order on the Amazon website and then manually recording and transferring the information to Alma, this feature streamlines and simplifies the process.

- Allows the staff user to search in Amazon for an item and then automatically transfer the information to Alma in order create a PO line for the item.

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Item search in Amazon

Item Search in Amazon

Resource Information

Search Index	● Books ○ Magazines
Amazon Location	USA
Title *	Marketing knowledge management
Author	
Availability *	Available
Key Words	
Maximum Price	
Minimum Price	
Publisher	
Minimum Percentage Off	
Power	
Sort list By	

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Item search in Amazon

Analytics issues report from receiving workbench

- August 2016: Staff user can view an Analytics report including missing items directly from the Received Items List page when managing the items of a continuous PO line.

- As part of a trend to bring the power of the Alma analytics reports into the Alma staff user interface there is now a link to an analytics report of issues directly from the "Receiving Workbench".
- When staff begin to receive the issues they can click a link to receive an analytics report for items of the POL on which they are working.

Analytics issues report from receiving workbench

- From the "Continuous" tab of the receiving workbench we click "manage items" for "Abstracts in anthropology"

Analytics issues report from receiving workbench

- From the list of items of the POL for "Abstracts in Anthropology" we have a link to "Analytics Issues Report".
- This is currently a hard coded report. In the future it will be customizable by the institution.
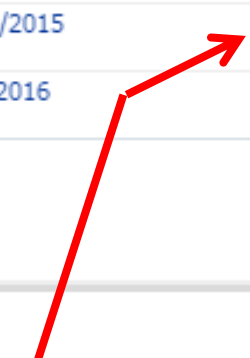
Analytics issues report from receiving workbench

Open in a new window Expand

Analytics Issues Report

PO Line Reference	Vendor Code	Barcode	Title	Description	Expected Arrival Date ▲▽	Receiving Date
90330	SER-EBSCO	2794353-1190	Abstracts in anthropology.	V.70 NO.1 2015	2/3/2015	
90330	SER-EBSCO	2794353-1230	Abstracts in anthropology.	V.71 NO.1 2015	10/4/2015	12/21/2015
90330	SER-EBSCO	2794353-1240	Abstracts in anthropology.	V.71 NO.2 2015	11/3/2015	1/7/2016
90330	SER-EBSCO	2794353-1250	Abstracts in anthropology.	V.71 NO.3 2015	12/4/2015	
90330	SER-EBSCO	2794353-1260	Abstracts in anthropology.	V.71 NO.4 2015	1/3/2016	2/8/2016

Refresh - Print - Export

Close

Vol. 71 issue 4 already arrived, we are still missing Vol. 71 issue 3

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Customize list of purchase request reject reasons

August						2016
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

- August 2016: It is possible to configure the drop-down list of reasons to reject a patron purchase patron request on the Purchase Request Reject Reasons code table

- This allows institutions to customize the Patron Purchase request workflow to specific local needs

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Customize list of purchase request reject reasons

General

| Other Settings | Currency Subset | Fund and Ledger Fiscal Period | Receiving Department Validations | Fund Types | Acquisition Jobs Configuration |
| Purchase Request Reject Reasons | Legal Deposit Reports | | | | |

	Enabled	Display	Order	Code	Description
1	✓		▼	COST	Cost
2	✓	▲	▼	IRRELEVANT	Irrelevant
3	✓	▲	▼	DUPLICATE	Duplicate
4	✓	▲		SLSN	The Senior Librarian was consulted and said no

Create a New Code Table Row

Quick Add

Code	Description	Default Value	
SLSN	arian was consulted and said no	Yes	Add Row

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Customize list of purchase request reject reasons

1 ☐ <u>Knowledge management in the library</u>
  Citation type: Book
  Request status: In Review
  Requester: Nadia Khan
  Created on: 2016-08-31
  Updated on: 2016-08-31
  Cost: 23.00 USD
  Requested for library: Library of Michigan
  <u>Edit</u> | <u>Approve and Order</u> | <u>Reject</u> | <u>Send query to requester</u> | <u>Assign to</u>

Reject reason	The Senior Librarian ▾		<u>Cancel</u>	**Reject**
	Cost			
	Duplicate			
	Irrelevant			
	The Senior Librarian was consulted and said no			

ry: Library of Michigan

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Customize list of purchase request reject reasons

Requested format	Physical
Requester	Nadia Khan
Request status	Rejected
Owning Library	Library of Michigan
Estimated cost	23.00 USD
Fund	
Vendor/Account	
Approved by	-
Requester note	-
Rejection reason	The Senior Librarian was consulted and said no

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Purchase requests visible in Primo my account

August 2016 calendar

- August 2016: The purchase requests created by the patron are visible to him in the "My Account" of Primo

- This allows the patron to track the progress of his request.
- The information includes:
1. Type - Purchase Request
2. Title - The title, with a link to the title (if one exists)
3. Author
4. Status - Status of the request
5. Location - The owning library

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Purchase requests visible in Primo my account

- Viewed by staff user in Alma

Purchase requests visible in Primo my account

- Viewed by patron in Primo

COUNTER usage report upload and harvesting

September 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

- Sept. 2016: The ability to upload COUNTER reports both manually and via SUSHI is being added to Alma.
- Additionally, new reports formats will be supported, beginning with PR1 and JR1a

- A new tab will exist in the vendor record named "Usage". In this tab:

1. SUSHI accounts can be defined
2. Files can be manually uploaded
3. Staff user can see details of the uploaded files

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COUNTER usage report upload and harvesting
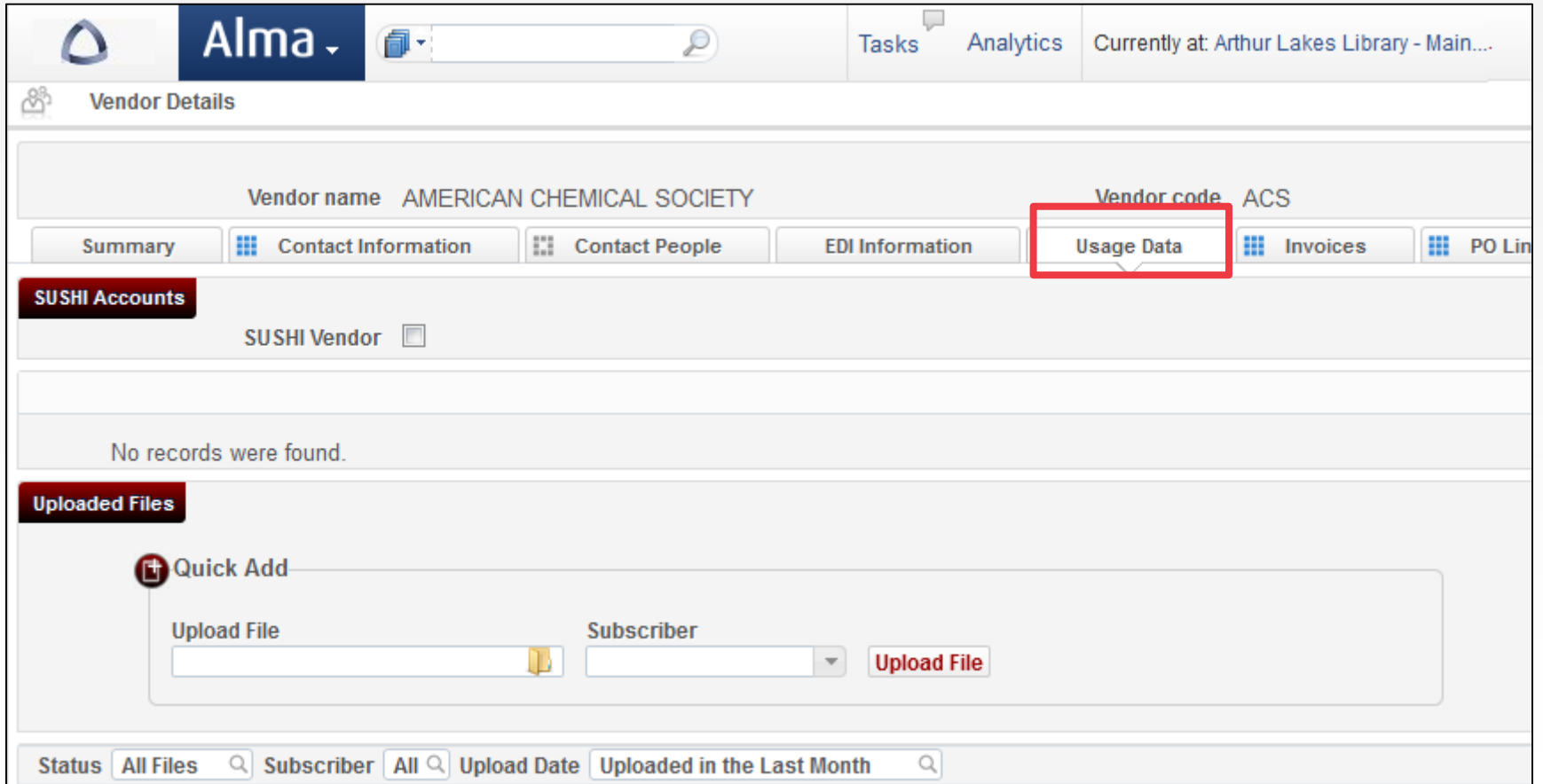
- SUSHI Accounts will be defined per vendor in the usage data tab of the vendor
- A weekly job will run to harvest the files via SUSHI
- Files can also be uploaded manually either
    1. From within the vendor record
    2. From the main menu and then choosing a specific vendor
- Data will continue to exported to Alma Analytics

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COUNTER usage report upload and harvesting

- 5 early tester partners are already testing this in September.
- Other existing institutions will begin using Alma to manage COUNTER usage reports as it is rolled out in late 2016 / early 2017.
- New institutions will use Alma for handling COUNTER reports.

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COUNTER usage report upload and harvesting

COUNTER usage report upload and harvesting

In the initial stages JR1 will be harvestable via SUSHI. Later the other formats will also be harvestable via SUSHI

The Subscriber will come from a predefined list and available here in the pull down box

From here the user can ensure that the data entered in the form is correct and that the connection works

COUNTER usage report upload and harvesting

- After the files are uploaded they appear in the lower section of the "usage data" tab of the vendor:

Possible actions on the uploaded files:
1. View
2. Download
3. Delete File
4. Delete File and Data

Filter actions on the uploaded files:
1. Status
2. Subscriber
3. Upload Date

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Advanced search on license terms

2017 Calendar

- 2017: This will be released as part of the new Alma User Interface. The license terms which appear in the license record "License Terms" tab will be searchable via the repository "Advanced Search".

- This will allow the institution to perform an efficient and powerful search for all aspects of the license terms.
- This will replace the current "advanced search" which exists from the list of items.
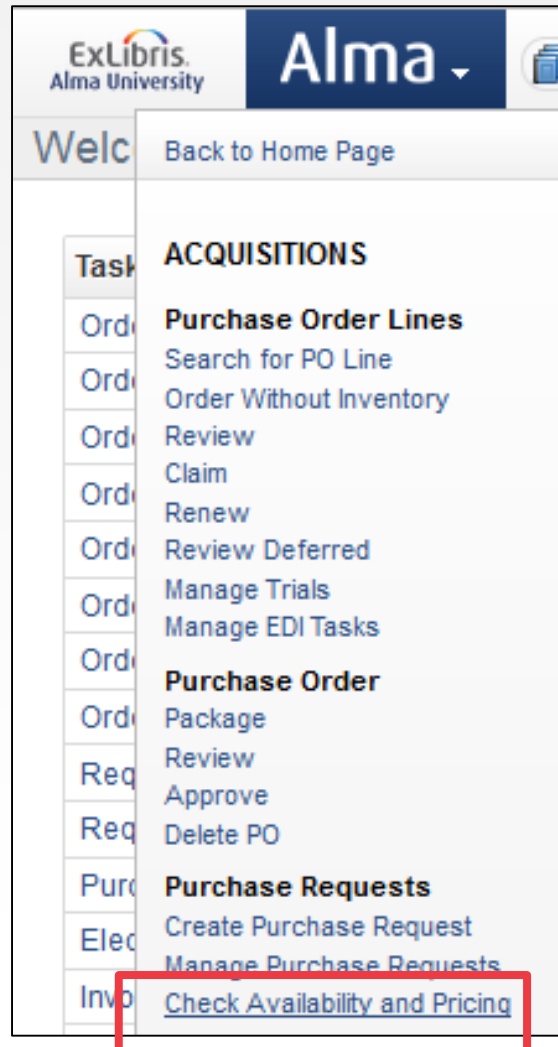
Check Availability and Pricing

- 2017: The "Check Availability and Pricing" feature will allow the librarian to check and compare the availability and pricing of an item across several vendors before purchasing it.

- This is a significant time saver for the librarian, as he does not need to leave Alma and enter multiple web sites to do a comparative analysis – it's all in one place and in Alma.

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Check Availability and Pricing

Check Availability and Pricing

Check Availability and Pricing

Embedded vendor performance analytics reports

- Analytics reports on vendor productivity will be embedded in and linkable from the vendor screens of Alma

- This is in addition to the current places where analytics reports are available from within the Alma interface. The current places are:

1. Repository search "More info > usage" for electronic portfolios
2. "Continuous" tab of receiving workbench for issues via "Analytics issues report" link
3. Summary tab of allocated fund for fund burn down

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Embedded vendor performance analytics reports

- This is part of the trend to bring the power of the Alma analytics reports into the Alma staff user interface.
- Will appear as a collapsible section in the main tab of the vendor.
- The information in the report will include:

1. Total amount ordered in previous year
2. Total amount encumbered in previous year
3. Total amount paid in previous year
4. Total number of orders in previous year
5. Total quantity ordered in previous year
6. Total quantity not received in previous year
7. Total quantity cancelled in previous year
8. Average days to receive in previous year
9. Average paid price in previous year

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Embedded vendor performance analytics reports

Improved indexing and faceting

- Behind the scenes on an infrastructural level several improvements are being made to the indexing

- On a technical level: text based indexing is being replaced by SOLR based indexing
- The searching of acquisitions administrative data will be much faster
- There will be
1. New facet options
2. POL attributes in the advanced searched

Thank you
Yoel.Kortick@exlibrisgroup.com

Yoel Kortick | Senior Librarian