

## Orange County Librarians\_LSP Meeting- March,19.2020

03/06/2020

Fullerton College

Present: Jeff LBC, Susan Santa Ana, Tim Fullerton, Linda SCC, Stephanie Cerritos, Yvonne Victor Valley, Masumi Fullerton, Minh Goldenwest, Nicole Santa Ana, Deb Cerritos, Ward Orange Coast, Ryan El Camino, Elizabeth Coastline,

Modifying OneSearch Box ( add Search Button and Tabs) in OU Campus -Ryan Gan

- [CCL Discovery Group Wiki](#) code and info for modifications
- Bootstrap iFrame

Setting up Alma link resolver & A-Z list for PRINT holding- Stephanie Rosenblatt

- Find Journal function?
- Create set of physical journal titles > examine to see if categorized the correct way
  - Link resolver resides in Alma
  - Serials vs Journals?
  - [Configuring journal search for Primo VE](#)

Purging User Records Process/Best Practices - Tim Ream

- SUNY Presentation - Process to Purge Users - <https://sunyla.org/sunyla-midwinter-2020/>
- [EXL - Purge Users](#)
- Best Practice purge users after one year of inactive.
  - Not purge anyone with block, holds, fines, -
- SIS load ? Active students will be reloaded and will link back to records.
- Cerritos has an expiration date and purge date the same.
- LBC - Day you expire students means they can't check out THAT day. Need to have the date as the next day.
- Documentation:  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/050Administration/030User\\_Management/030Purging\\_Users](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/030Purging_Users)
- Documentation: <https://developers.exlibrisgroup.com/blog/Patron-Purge-in-Alma/>

Terms of use - granting permission to renew items - Minh question

- Alma > Config > Fulfillment > Terms of Use > Pick TOU > Maximum Renewal Period
  - ALSO Fulfillment > Fulfillment Configuration Utility
- Ignoring when there is a hold request. Student able to renew in primo online

Calendar Management Effect on TOU - Susan Hoang

- Everything is due on Wednesday before semester closes. (Books due end of Term)
  - Setting up closed dates on Thur and Fri
  - Choice in TOU - Closed management date. Don't roll to the next open day, have due before the closed date.

User management - dual rolls

- Have SIS loads in a hierarchy
- Can you have a field don't get updated in SIS load?

- opened a ticket regarding partial sync of student fields. According to Le Tran it is not possible to only update parts of a student record during a SIS load.. See my case #00822510 - Yvonne Reed

#### Importing MARC records -Ward

- Deb- Resources > Manage Import Profiles
  - Matching is tricky. ISBN needs to match exactly.
  - MARC record file
  - DEB to add Cerritos Salesforce case in error with serial match
  - [CCL Cataloging Wiki](#) has some info?
  - Ryan - import record using 945 field
  - Import Profile Details > Advanced to add Vol information

#### Duplicated Electronic Resources

- Step 1: Search for electronic collection > edit collection > Additional tab > edit portfolio list > export portfolios
- Step 2: Admin > Manage Sets > Add set > Itemized > upload the excel portfolio
- Step 3: Admin > Run a job > Delete portfolios > select the newly created set.

#### ILL - Jeff

- Alma > Configuring requests forms for Primo VE
- No one has set up yet
- [https://knowledge.exlibrisgroup.com/Primo/Product\\_Documentation/020Primo\\_VE/034Get\\_It\\_Configuration/Configuring\\_Request\\_Forms\\_for\\_Primo\\_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/034Get_It_Configuration/Configuring_Request_Forms_for_Primo_VE)
- UC and CSU resource sharing? How feasible is this for CC to support? Maybe something for the future?
- Borrowing privileges -

#### Work orders - Ward

- Work orders have been built in time frames. Tim referenced a book showing up in Primo stating the book will be ready in 30 days....
- Doesn't seem like something people are using. Work orders are not set up in a way that seems beneficial.

#### Creating reports (analytics) - Masumi / Minh

- [CCL Analytics Workgroup](#)
- Be Careful about language. You can't do reports in Alma. Instead they are called "Analysis" in Oracle Business Analytics but EXL calls them reports
  - Analytics > Design Analytics > Opens Oracle Business Intelligence
    - Create > New > Analysis (=report) > drag and drop to create reports
- Widgets in Alma for reports - Can be added on staff dashboards.
  - Create Analysis > Analysis Configuration And Subscription > Create Report, Dashboard, Widget > ADD New Analytics Object > Alma Analytics Object > Picks Analytics Folder > College Reports (EXL already created) > Type > Name (map to Analysis report) > Add a role > Save > Alma home page > + add widget

#### Adding OCLC holdings - Deb

- Connexion
- Can do as job in Alma - Publishing Profile

#### Acquisitions -

- Some benefits - Jeff
- LBC, Cerritos, and Victor Valley will be using this starting in the Summer (that's the plan)
- WAYS TO AVOID Acquisitions - to add holdings
  - Receive and item in a periodical. Alma > Physical titles search > Items (at bottom) > Add item
  - Add new MARC record

#### ELUNA

- Multiple going. Discussed Knowledge Days vs Conference.

#### Ghost Records? [How to prevent ghost records in electronic collections](#)

- Duplicates
- Ghost records
- Ryan created dummy record and attached to ghost record and then they delete it

#### Open discussion

- Tim uses Canvas Discussion Boards to figure out issues
- You can search other Salesforce Cases (My Consortium)!
- CDI documentation
- Ebsco indexing at the NZ?
- Serial Solutions being purchased by EXL
- Banner being purchased by EXL
- Database collections in the NZ zones? What are we supposed to link to. Confusion about Jessica email in 02/19/2020

NEXT Meeting March 20 at OCC

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### **PRIMO VE - wish list**

12/06/2019

Elizabeth - Coastline

<https://caccl->

[coast.primo.exlibrisgroup.com/discovery/search?vid=01CACCL\\_COAST:COAST](https://caccl-coast.primo.exlibrisgroup.com/discovery/search?vid=01CACCL_COAST:COAST)

#### [Primo VE Customization Best Practices](#)

Search:

1. Remove Open Access tag (and maybe content) in search results and "Availability"
    - a. [Open Access Indication in Primo VE](#) for css to hide.
    - b. Unfortunately not working for me, but maybe I am doing it wrong?
  2. Resize / dynamic logo
  3. Change text in the search bar to: Search or Textbooks / Course Reserve for the textbook page.
  4. Modify Advanced search facets
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