UMWUG

Upper Midwest User Group

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6th Conference

of the

Upper Midwest Users Group

October 16-17, 2018, Marriott Hotel, Coralville IA

*UMWUG   *   ELUNA   *   EX LIBRIS*

2018 UMWUG Conference
Schedule at a Glance

Tuesday, October 16, 2018

11:00 am – 3:00 pm	Registration Desk Open	Convention Center foyer
1:00 pm – 3:00 pm	Welcome and ELUNA update	Salon C
3:00 pm – 3:30 pm	Break	Foyer
3:30 pm – 4:30 pm	Domo Arigato, Mr. Leganto! Facepalms, Successes, and Surprises In Our First Year	Salon E
	A view to an ILL: an Alma and WorldShare resource sharing workflow	Salon B
	Primo VE migration at NDSU	Salon D
3:30pm – 5:15pm	Digging into Analytics	Salon A
4:45 pm – 5:15 pm	Connecting and Using Alma and Primo Analytics Data with Tableau	Salon B
	Demystifying the Alma to Primo pipe for display & search of MARC data	Salon D
	Authority Control Task List in Alma	Salon
	Licenses in Alma	Salon E
6:00 pm – 8:00 pm	Reception – sponsored by Iowa State University	Terrace

Wednesday, October 17, 2018

8:00 am – 11:00 am	Registration Desk Open	Foyer
8:00 am-10:30 am	Continental Breakfast	Foyer
8:00 am – 9:00am	Ex Libris Company & Product Update	Salon C
9:15 am – 10:15am	Terms of Preferment: Bridge Consortium's implementation of Alma Preferred Term Correction (PTC)	Salon A
	Wisconsin's Adventures in Resource Sharing	Salon B
	Making work orders work for you: an interactive discussion of Alma work orders	Salon D
	Weeding the Stacks at UW-Milwaukee	Salon E
10:15am – 10:30am	Break – continuation of continental breakfast	Foyer
10:30am – 11:30 am	The "Other" Alma Analytics: Optimizing Analyzed Bibliographic Records for Patrons, Staff, and Systems	Salon B
	Why is Alma printing so difficult? A facilitated discussion	Salon A
	Herding Cats: Ideas for Managing "All the Things" at Work	Salon D
	A New Items List: Google Scripts Sorcery, Alma API Alchemy and Drupal Divination	Salon E
	Fulfillment discussion opportunity	Salon 4
11:45am – 12:45pm	Alma and Developing Student employee roles and workflow	Salon A
	Search strategies, sets, and potential workarounds for new(er) ALMA adopters	Salon B
	On TRAC to Success: Creating a Multi-Institution, Statewide Fulfillment Network	Salon D
	Connecting Amazon Alexa to Primo	Salon E
	Managing DDA and EBA programs at two small schools without the network zone	Salon 4
12:45 pm – 1:45 pm	Lunch	Salon 1-3

2:00 pm – 3:00 pm	Averting Katastrophe: KBART Implementation Made Easy(er)	Salon A
	Coordinating Staff Training for Alma	Salon B
	Making APIs work for you: Creating integrations to enhance user services	Salon D
	Using MacroExpress with Alma	Salon E
	Esploro -- Update from a Development Partner	Salon 4
3:15pm – 4:15pm	Playing the Serials Game in Alma	Salon A
	Making Sense of the Alma Community Zone	Salon B
	Introduction to Alma Analytics for Access Services Users	Salon D
	E-resources discussion opportunity	Salon E
	Authority Control Task List in Alma	Salon 4

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Presentations will be available on the ELUNA Documentation Repository two weeks after the conference. Please contact your systems office if you do not have credentials to access the site.

http://documents.el-una.org/

2018 UMWUG Conference
Programs and Presenters

Tuesday, October 16 – Breakout Sessions 3:30pm-4:30pm

Domo Arigato, Mr. Leganto! Facepalms, Successes, and Surprises In Our First Year / Greg Argo and Bill Zych – University of St. Thomas – Salon E
Join us for a lively, flexible session where we will attempt to brain dump all of our experiences with Leganto over the last 12 months while entertaining any and all questions along the way. We'll cover the highs and lows of functionality, the variety of manifestations lists can take, interesting interpersonal experiences, cautionary tales, and all the ways our lives have changed (mostly for the better!) since becoming Leganto customers. Come sail away with us!

A view to an ILL: an Alma and WorldShare Resource Sharing Workflow / Martin Patrick – St. Olaf – Salon B
Interlibrary loan is one of the most radically important functions of a library. Because our libraries prefer electronic over print now, our ILL lending rates have nosedived. This presentation will focus on our experimental workflow to continue lending through ILL. We will also look at how setting our holdings in WorldShare affected our ILL lending rates to date, and whether or not it helped us intercept requests from our own campuses. The intended audience is those interested in e-resources and ILL.

Primo VE Migration at NDSU / Amy Reese – North Dakota State University – Salon D
Primo VE is the newest iteration of the Primo discovery service. NDSU has completed migration to the new platform in September. The migration was easier than you'd expect. We'll go over some of the things you need to be aware of during the migration process, and some of our post-migration experiences.

Tuesday, October 16 – Breakout Sessions 3:30pm-5:15pm

Digging into Analytics / Michael Johnson - University of Minnesota - Twin Cities – Salon A
Bring your questions, your challenges and your curiosity, as we dig deep into Analytics to find solutions we didn't know were there... and probably discover no solutions where one ought to exist. There have been speaking presentations demonstrating Analytics at conferences, but this is intended to be an active, collaborative deep-dive into what Analytics can, and can't do. Users should come with either questions or a willingness to provide answers and expertise. Some example dashboards and reports will be shown, but ideally, this workshop will dive into your own institution's challenges.

Tuesday, October 16 – Breakout Sessions 4:45pm-5:15pm

Connecting and Using Alma and Primo Analytics Data with Tableau / Greg Davis – Iowa State University – Salon B
ExLibris has provided a Web Data Connector (WDC) that can be used to connect data generated in Alma and Primo analytics reports to data visualizations generated in Tableau. This session will demonstrate how the WDC connection works, and discuss the abilities and limits of this technology.

Demystifying the Alma to Primo Pipe for Display & Search of MARC Data / Susan Wynne – University of Iowa – Salon D
Catalogers and Library IT staff at the University of Iowa are comparing MARC data from Alma to PNX (Primo Normalized XML) records to optimize display, searching, browsing, and faceting of MARC bibliographic data in the discovery layer. We will discuss the scope, goals, and strategies of our ongoing project; describe resulting configuration changes for improved display and access; and share lessons learned during a process with many twists and turns. This project is creating new opportunities for collaboration among catalogers, systems, and public services staff.

Authority Control Task List in Alma / Stephen Hearn - University of Minnesota
The session will explore the various reports available via Alma's Authority Control Task List, how they can assist with access point management, and how they complement other Alma authority control functions and reports.

Licenses in Alma / Lisa Martincik – University of Iowa – Salon E

Wednesday, October 17 – Plenary Session 8:00am-9:00am

Ex Libris Company and Product Update – Salon C

Wednesday, October 17 – Breakout Sessions 9:15am-10:15am

Terms of Preferment: Bridge Consortium's Implementation of Alma Preferred Term Correction (PTC) / Karla Jurgemeyer, Hsianghui Liu-Spencer and Martin Patrick – St. Olaf – Salon A
Two years after go-live, the Bridge Consortium of St. Olaf and Carleton libraries finally turned on Alma Preferred Term Correction (PTC) for authority control. In this session, we will talk about our experiences in preparing for PTC, workflows and documentation we developed for the reports, problems and successes we've experienced, and our current status with PTC. We will close with a group dialogue about future hopes for Preferred Term Correction (PTC). This session is intended for catalogers, systems staff, and anyone interested in authority control in Alma.

Wisconsin's Adventures in Resource Sharing / Katie Sanders and Crystal Buss - University of Wisconsin-Oshkosh – Salon B
The University of Wisconsin System campuses went live with Alma Resource Sharing back in May 2015. Since then we have made a number of enhancements and customizations to our system and workflows in an environment of ever-constant change. We will discuss how our consortium deals with monthly releases, testing, and implementing new features, as well as how we work toward maximizing efficiencies in our workflows. We will also discuss some of our customizations, provide instructions, and give a bit of insight for what we have planned next.

Making Work Orders Work for You: An Interactive Discussion of Alma Work Orders/ Shelby Strommer – University of Iowa – Salon D
Work orders are a key feature for tracking physical items in Alma. Lean about how the University of Iowa uses work orders and how they have impacted our workflows, and come ready to discuss work orders in your own institution. What are the successes? What are the snags? How have you adapted? This session will provide attendees with an opportunity to share tips and ask for advice.

Weeding the Stacks at UW-Milwaukee / Susan Foran - University of Wisconsin—Milwaukee – Salon E
The good news was that we had received a large financial donation to relocate and enlarge the UWM Archives. The bad news was that we had to deaccession or move a large part of our circulating print collection, an estimated 124,000 volumes, to make room for the new Archives. I'll show how we used Alma to select items, refine reports, and withdraw 30,000+ volumes.

Wednesday, October 17 – Breakout Sessions 10:30am-11:30am

The "Other" Alma Analytics: Optimizing Analyzed Bibliographic Records for Patrons, Staff, and Systems / Melissa Moll – University of Iowa – Salon B
Since the University of Iowa migrated to Alma and hosted Primo during the summer of 2016, analyzed bibliographic titles have remained a pesky and complex issue with multiple pain points from the time of order through patron requests. Over three mornings in June 2018, a working group assembled from acquisitions, cataloging, library IT, and public services staff met to assess and tackle the problem. The session will cover our start-to-finish game plan for the working group, potential solutions that we explored, and impacts on both future workflows and past legacy data.

Why Is Alma Printing So Difficult? A Facilitated Discussion. / Erik Biever – University of Minnesota – Salon A
Discuss why some libraries struggle with Alma's email-oriented method for printing. Share experiences, compare notes on diagnosing problems, imagine improvements and/or solutions**.**

Herding Cats: Ideas for Managing "All the Things" at Work / Melissa Platkowski - University of Wisconsin - Green Bay – Salon D
Herding cats. Wrestling an octopus. Climbing a hill of sand. Drinking from a fire hose. Do any of those idioms describe your work? Have you grappled with finding a good system to help you organize your projects, tasks, and goals? To plan your work, to plan your day? (Or let's face it – to plan your next hour?) Our work is by nature dynamic, collaborative, unstructured, and unpredictable. We need tools that are just as flexible as we are to manage All the Things, and I'm finding some methods that work for me. Maybe some of them will work for you, too!

A New Items List: Google Scripts Sorcery, Alma API Alchemy and Drupal Divination / Angie Stengl – University of Minnesota – Morris – Salon E
Briggs library, in collaboration with Information Technology, created a semi-automated "New Arrivals" page in Drupal. Leveraging student worker project time and existing Google Scripts framework, the project spanned the 2017-18 school year with a functional page launching in April 2018. The multi-step process uses google scripts, google sheets and multiple APIs to gather book data and publish to a Drupal page. This project solved our challenge of publishing a selected list of books to the library website. This session will highlight the workflow from book barcode to the website, focusing heavily on the Alma API connections in the process.

Fulfillment Discussion Opportunity – H Pedelty – University of Iowa – Salon 4
This is an opportunity to meet with colleagues and discuss workflow practices or issues.

Wednesday, October 17 – Breakout Sessions 11:45am-12:45am

Alma and Developing Student Employee Roles and Workflow / Paula Coulthard and Jeanne Little – University of Northern Iowa – Salon A
. At Rod Library we rely on student employees to perform many tasks. Understanding the roles needed, searching Alma, and configuring the display can result in a more efficient workflow by reducing errors and keystrokes. Migrating from Millennium has caused staff to reconstruct the student employees' work processes and re-think many of the tasks; exploring and understanding roles and how the basic search strategy impacts the process is a key to developing an efficient process. Opportunity for questions and sharing of processes follows presentation.

Search Strategies, Sets, and Potential Workarounds for New(er) ALMA Adopters / Erika Barber and Sheryl Bissen – Grinnell – Salon B
Basic session to cover search strategies for building sets that meet the basic needs of identifying and updating record fields post ALMA migration. Though this is a basic to intermediate session, it may be of particular interest to those libraries who are in the process of migrating to ALMA or who have migrated recently.

On TRAC to Success: Creating a Multi-Institution, Statewide Fulfillment Network / Andrew Welch – Drake University; Brian Thompson - University of Iowa; Dawn Mick - Iowa State University – Salon D
In 2016, ten Iowa and Nebraska academic library systems independently migrated to Alma and Primo and formed TRAC: the Two Rivers Alma Collaborative. In 2017, TRAC libraries decided to leverage our common--though not shared—Alma installation and create a non-consortial fulfillment network and shared Primo view that allows direct requesting and inter-institutional walk-in borrowing

Connecting Amazon Alexa to Primo / Greg Davis – Iowa State University – Salon E
The Iowa State University (ISU) Library is working with a company called ThickStat to develop a Amazon Alexa Skill that uses the Primo Search API to perform searches by title, author, or subject. This session will present information learned so far in the ISU project. A live demonstration of the Alexa skill will be provided as part of this session.

Managing DDA and EBA Programs At Two Small Schools Without the Network Zone / Martin Patrick – St. Olaf – Salon 4
St. Olaf and Carleton Colleges have individual DDA and EBA programs and shared a DDA program with JSTOR. These programs are managed by one person responsible for metadata and one person at each school responsible for the acquisitions side. This presentation will cover the ways we have automated as much of the workflow as possible using Alma and Marc Edit, how we made a collaborative, non-network zone DDA program work, and what happens when one school continues the DDA and the other does not, among other topics. The intended audience is those interested in e-resources, acquisitions, cataloging, and automation.

Wednesday, October 17 – Breakout Sessions 2:00pm-3:00pm

Averting Katastrophe: KBART Implementation Made Easy(er) / Chris Koehler and Sunshine Carter - University of Minnesota Twin Cities – Salon A
Implementing a new process is challenging, but can yield increased efficiencies. The University of Minnesota Libraries took on the ambitious task of implementing the Alma functionality to upload automatically electronic holdings from Elsevier via KBART. The presenters will review the process and share their trials, tribulations and successes along the way**.**

Coordinating Staff Training for Alma / Chris Clark – University of Iowa – Salon B

Making APIs Work for You: Creating Integrations to Enhance User Services / Chad Kluck - University of St. Thomas – Salon D
APIs add functionality outside Alma and Primo. St. Thomas students and faculty access the university's portal to see requests, loans, and fines next to university news and events. We've integrated with Canvas LMS and plan to develop a chat assistant to search, request, and renew items. All it takes is time to play and a little coding. For beginners to intermediate, we'll explore Ex Libris's API Center, generate your first few lines of working code, introduce Postman (a free API tool), and explore GitHub. It CAN be as easy as copy and paste! Also covered: best practices, security, and deployment (AWS).

Using MacroExpress with Alma / Victor Gorodinsky - University of Wisconsin--Madison – Salon E
Discussing creating and maintaining MacroExpress macros for use with Alma. Emphasis is on cataloging.

Esploro -- Update from a Development Partner / Sue Julich – University of Iowa – Salon 4
The University of Iowa Libraries is a development partner for a new Ex Libris product called Esploro. Esploro is a research data management service built on the Alma framework. I will provide an overview of Esploro and discuss UI's involvement in the development process.

Wednesday, October 17 – Breakout Sessions 3:15pm-4:15pm

Playing the Serials Game in Alma / Julie Rashid & Fariha Grieme -- University of Minnesota Twin Cities – Salon A
Processing serials in Alma feels like being at practice on a tennis court, bombarded with balls from a mechanical launcher. The balls are flying in every which direction and you can't move fast enough to hit them all. As we develop our muscles and dexterity, we get better and better, but we are still not ready for Wimbledon. Managing print serials in Alma definitely tests your patience and investigative skills, but we are persistent and know when we need to build workarounds. Come and see how the University of Minnesota plays the serials game in Alma!

Making Sense of the Alma Community Zone / Stacie Traill – University of Minnesota Twin Cities – Salon B
The Community Zone is an essential component of Alma, containing linking and bibliographic information for thousands of electronic resources, and authority records for a number of thesauri, enabling Alma's automated authority control processes. This presentation will cover several Community Zone-related topics, including (but not limited to):
'- What's in the Alma Community Zone
'- Using the Community Zone for authority control.
'- Quality in and enhancement of Community Zone bibliographic records for e-resources
'- How the Community Zone is maintained and updated
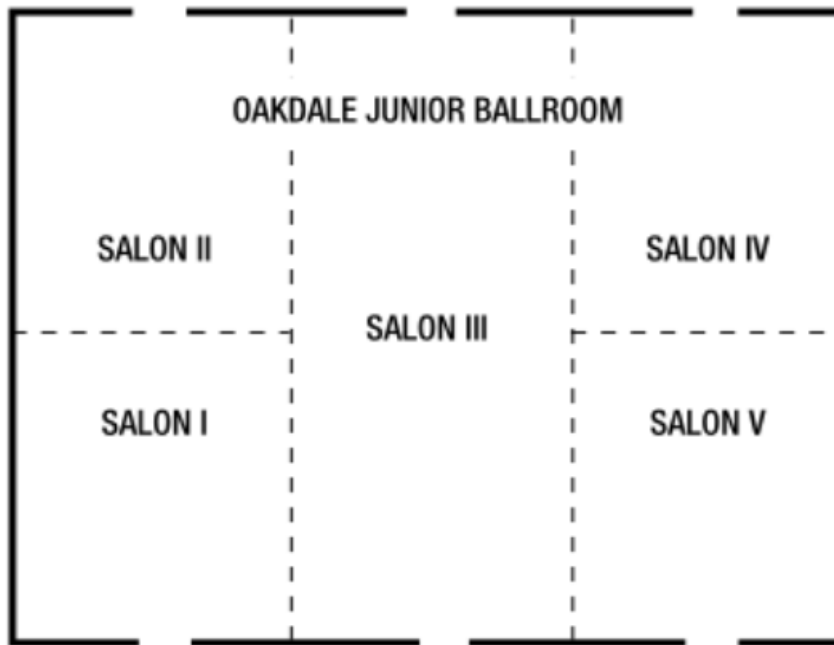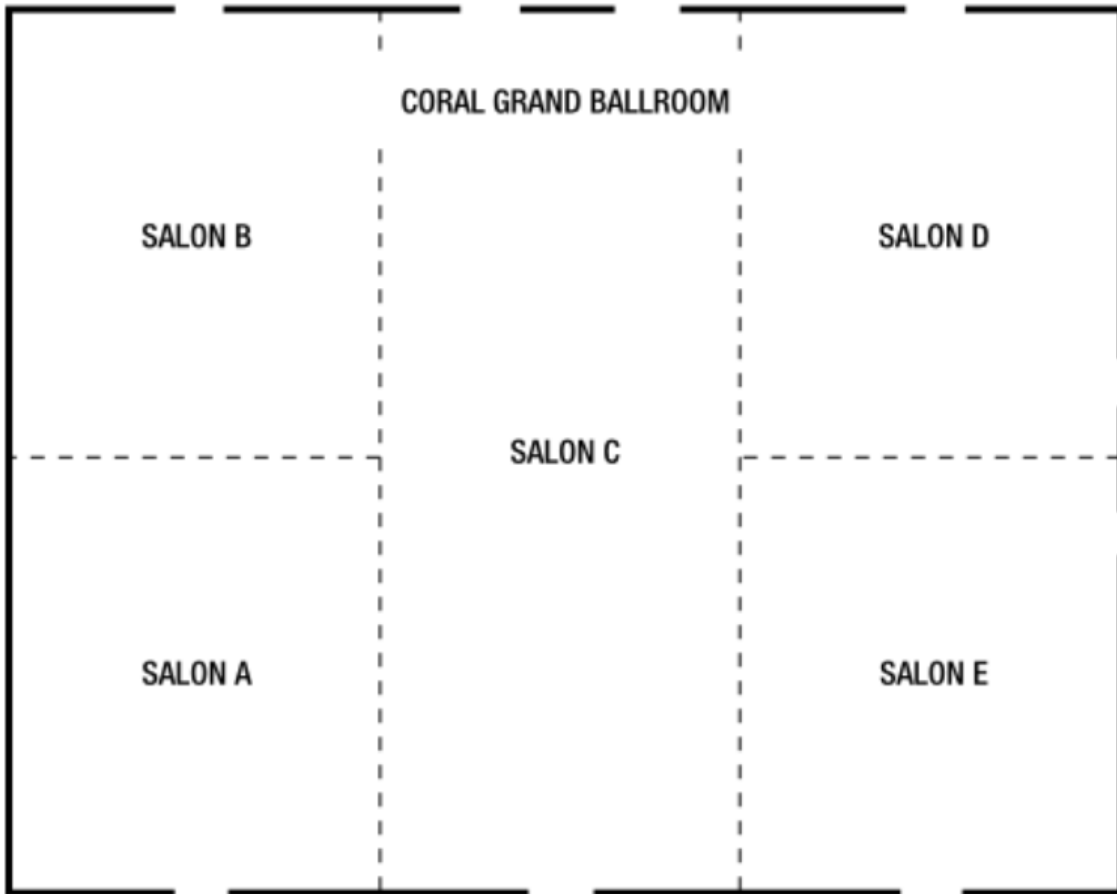'- The work of the Alma Community Zone Management Group
The focus will be on practical information and lessons learned at the University of Minnesota after 4+ years live on Alma.

Introduction to Alma Analytics for Access Services Users / Melissa Gevaert - University of Northern Iowa - Rod Library – Salon D
This session will discuss how the University of Northern Iowa has built analytics reports for missing items, items about to be billed, and statistics. You will be shown how to set up scheduled analytics, as well as tips and tricks for creating reports that are organized and useful. This session is ideal for new and less-experienced analytics users.

E-Resources Discussion Opportunity – Shari Theroux – South Dakota State University – Salon E This is an opportunity to meet with colleagues and discuss workflow practices or issues.

Marriott Floor plan:

CORAL GRAND BALLROOM

SALON B

SALON D

SALON C

SALON A

SALON E

OAKDALE JUNIOR BALLROOM

SALON II

SALON IV

SALON III

SALON I

SALON V

Notes:

Notes:

THANK YOU!!

Sponsors

Planning Committee

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ELUNA Site: http://el-una.org/

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