



# Alma Best Practice Day

11<sup>th</sup> February 2016

ANZReg

  
**ExLibris**  
a ProQuest Company

## *Areas of discussion*

**1**

**Working in the Community Zone**

**2**

**Using PDA in Alma**

**3**

**Configuring U-Resolver**

**4**

**USTAT and Alma Analytics**

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### **Working with other vendors on auto holdings updates**

e.g. Ovid and ProQuest



### **Constantly working on adding to and improving the metadata**

In consultation with vendors and as a result of cases. New additions e.g. Sage in Nov 2015.



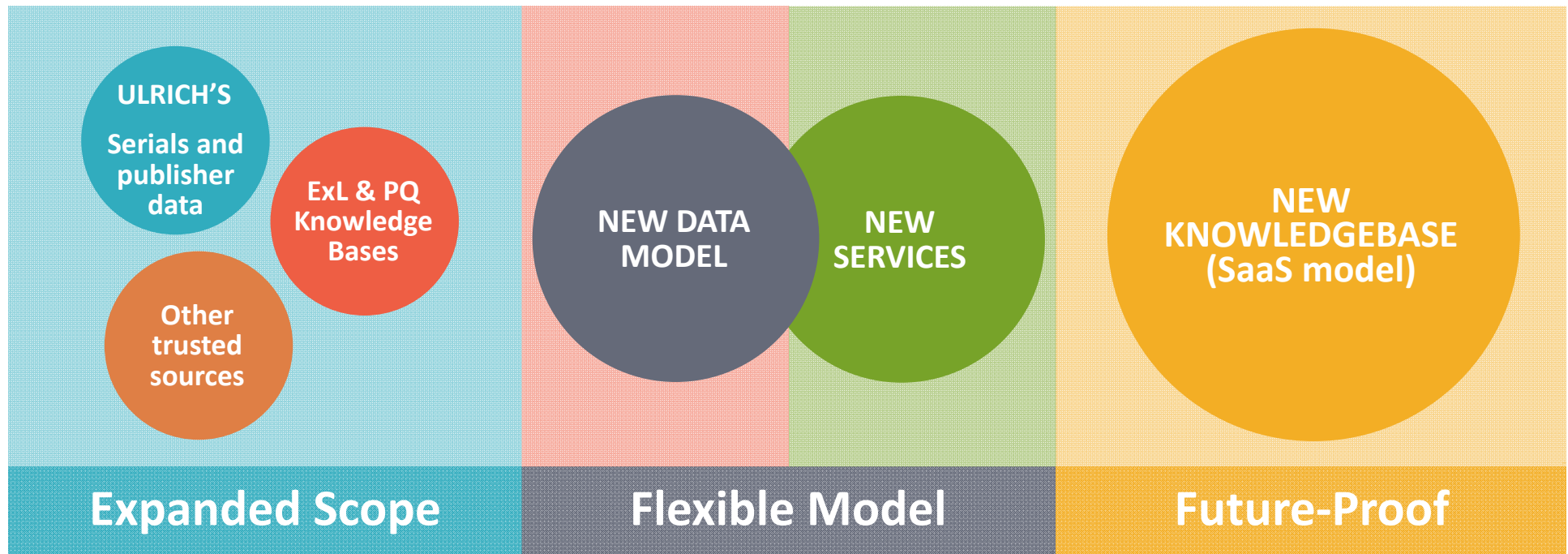
### **Leverage ProQuest's New Knowledgebase in Alma**

Starting H1 2017

### ▪ **Auto-holdings Update**

- Automatic update of electronic holdings eliminating the need to manually maintain the electronic holdings for those collection.
- Solution is based on a integration profile that will retrieve the institution specific holdings in KBART format using an API
- Solution is similar to the existing upload electronic holdings from Elsevier

# Boosting The Alma Experience with New Knowledgebase



## Authoritative Resource Metadata

Data from a variety of sources: e-resource metadata, Ulrich's, MARC authority records (ProQuest unique assets)

## Expandable Data Model

New relational structure allows for any content type and supports linked data

## Support for New Business Models

Understands demand-driven acquisition (DDA), perpetual access rights, open access

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- **Continue building on Alma PDA model**
  - Incorporate Intota vision into Alma roadmap
  - Enhance Alma roadmap with innovative Intota features
  - *Enhanced automated demand-driven acquisition workflow*
- **Leverage ProQuest's New Knowledgebase in Alma**



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## Configuring U-resolver

- Where you have isbn and eisbn on the open url, the isbn leads to bib without services and the eisbn leads to the service that you are expecting to get.
- The uresolver algorithm search for mms base on the following identifiers: "issn", "eissn", "isbn", "eisbn", "lccn", "coden", "oclc unique number", "oclc number" one by one  
If we find mms we stop
- **Fixed later this year**

## Configuring U-resolver

- Internal URL checker to validate hypertext links
- Validate hypertext links in BIB records and local portfolio/collection level (dynamic or static)
  1. on demand as an action on local portfolio level/collection level
  2. Based on set of bibliographic records/portfolios in process automation
- **Fixed later this year**

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**USTAT and Alma Analytics**



**In March 2016 it will be possible to manually upload COUNTER reports in Alma (not Ustat)**

NOTE – Link resolver usage subject area added to Analytics late last year



**In April 2016 it will be possible to upload in Alma via SUSHI**



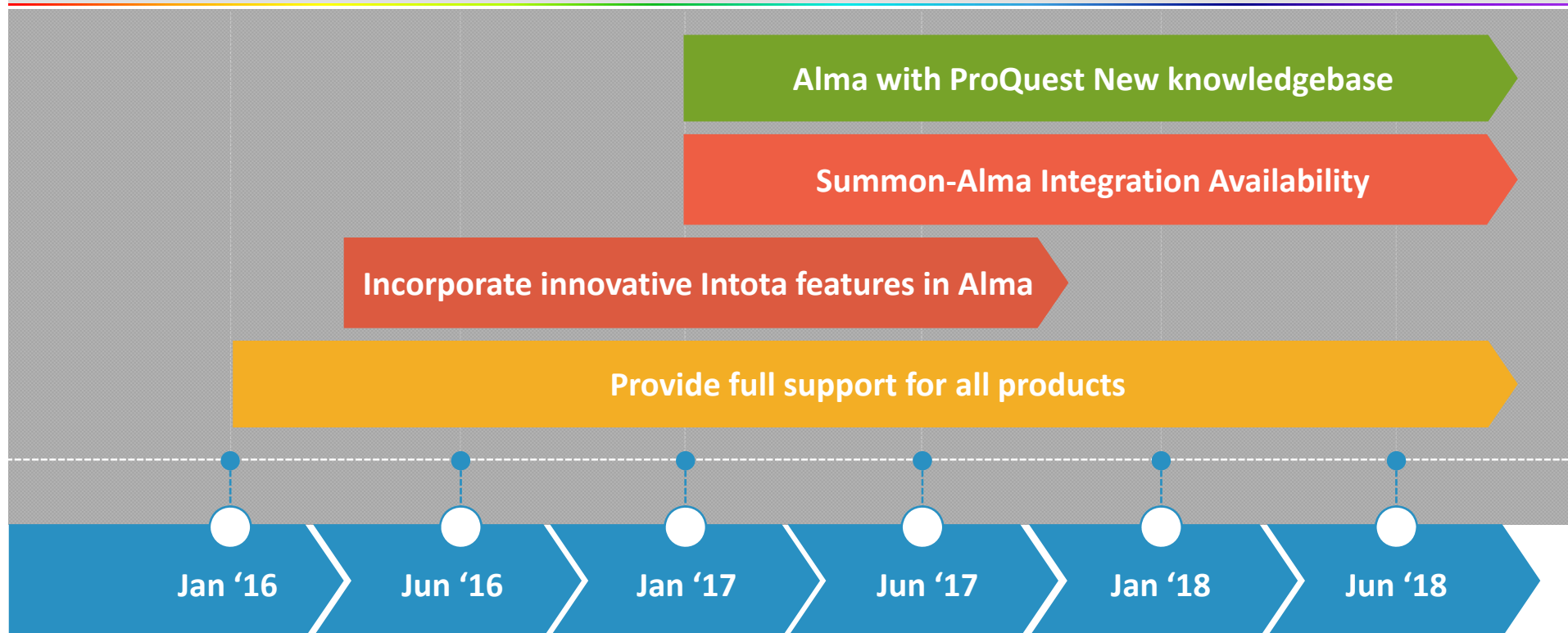
**Enhance Alma roadmap with innovative Intota features including the Intota Assessment reporting**

- **March development -**
- Manual loader for:
  - XLS, XLSX, CSV, Tab Delimited XML (Only for JR1)
  - Structure validation
  - Data integrity validation
  - File Entity and object
  - Data loader to Temp table
- Support for the following formats:
  - JR1,2 R3/4
  - DB1
  - BR 1,2

### • **April development -**

- File uploaded should be saved in "Attachment" table or in "Loaded file data".
- Action to loaded files
  - View
  - Download
  - Delete
- List filters
- Allow load files from Acq menu
  - Per vendor/Subscriber
- Attach the file loaded to a specific vendor and view each loaded file under the relevant vendor
- Add flag/filter to vendor list for SUSHI enabled <-- Supported!

## Integration Strategy: Leveraging Our Combined Strengths



The Alma roadmap will be enhanced with innovative capabilities from the Intota vision.

For example:

- ▶ ProQuest's New Knowledgebase
- ▶ Enhanced automated demand-driven acquisition workflow
- ▶ Alma Analytics enhanced with unique Intota Assessment features (external resources such as BIP)
- ▶ Index Enhanced Direct Linking
- ▶ Alma Community Zone enhanced with content from ProQuest





**ExLibris have made some useful changes to CZ records in 2015, for example the introduction of the new Resource type field based on the 008 position 23 or position 29 for maps and visual material. This development has allow us to develop some useful Alma analytics reports based on resource type. However, many CZ electronic records have no code in this 008 position and are instead # <blank>**

- We are aware of this and planning on 'fixing' it. Tentatively planned for Q2 2016.
- Also for point two – Print vs Electronic records.



**Do you have plans to enhance the CZ ebook MARC records by working with vendors to gather better quality metadata? If not, are we meant to be relying on PCI metadata for discovery of subject matter (book chapters rather than book records)? Are you planning on upgrading the quality of PCI metadata?**

- Yes we are constantly working on improving the metadata and this is done via cooperation with vendors.
- Also, the enhancement of the Alma Community Zone and PCI with the ProQuest Knowledge base.



**We really like the Elsevier KBART solution. Automatically updating our Elsevier Journal & eBook holdings is working well. Can ExLibris work with other vendors or ideally ALL vendors to provide this solution for holdings?**

- Yes, we have plans for Ovid and ProQuest and I am sure others will follow.



**We are not using Alma PDA to manage our PDA collections because we need to retain access to purchased eBooks in perpetuity - even when the vendor removes them from PDA?**

- Enhanced PDA as part of the enhancement of the Alma roadmap with the features from Intota V1.
- The Alma PDA clean-up functionality only removes non-ordered records, all others remain.



**Local MARC fields 59X, 69X and 9XX are designed to be institution specific, and not shared into bibliographic utilities?**

- This is the case that currently local fields are contributed (unless these were created as 'Add Local Field' into a Network Zone record.)
- This has been raised with Product Management.



**Are there any proposed enhancements to the PDA functionality on the Alma roadmap?**

- Enhanced automated demand-driven acquisition workflow as a result of the addition of the exciting Intota v1 features being added to the Alma roadmap.



**There are currently no PDA specific fields in Analytics. Are you going to add any PDA fields to Analytics?**

- This is planned as part of the addition of the Intota Assessment features being added to the Alma roadmap



**Documentation was difficult to understand when finding out what our link resolver URL was, setting up Google Scholar profile, etc.**

- Please take a look at the resources on the Knowledge Centre, this is covered in the Primo Integrations and also the fulfillment configuration documentation.





**Are there still plans to change from storing data in USTAT to Alma ? Ex Libris June 2015 roadmap document for H1 2016 under Acquisitions that this was changing. If this is still going ahead will there be a migration of data from USTAT to Alma ? Any other details ?**

- In March 2016 it will be possible to manually upload COUNTER reports in Alma (not Ustat).
- In April 2016 it will be possible to upload in Alma via SUSHI.



**It is currently limiting that Ustat will only harvest JR1 reports. What is your plan for expanding report types available in Ustat and increasing auto-harvesting capability, e.g. DB1 and BR1?**

- Currently supported are JR1, DB1, BR1 and BR2.



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## The Digital Part of Alma



Third leg of unified resource management:

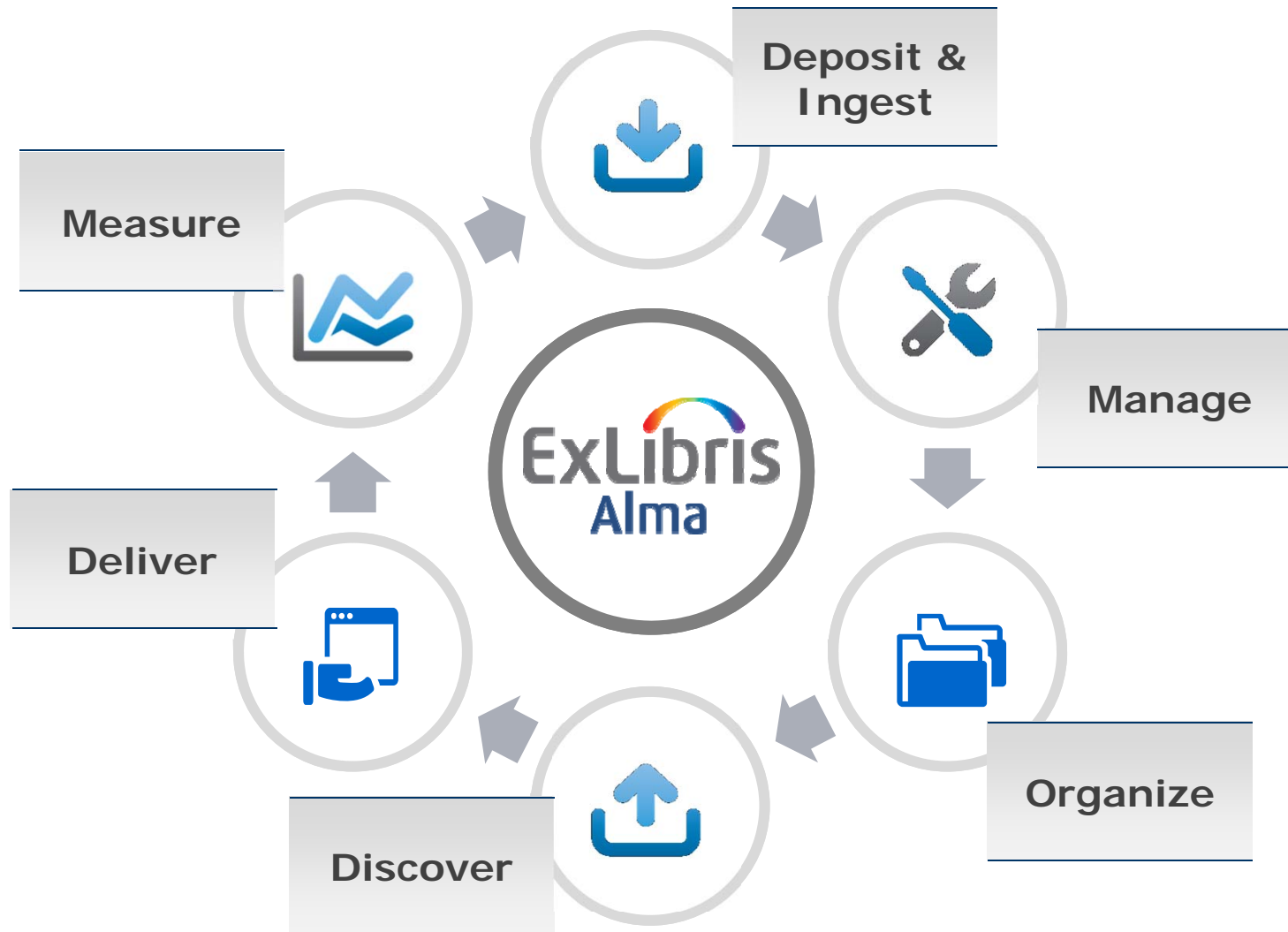
- **P**(rint)
- **E**(lectronic)
- **D**(igital)



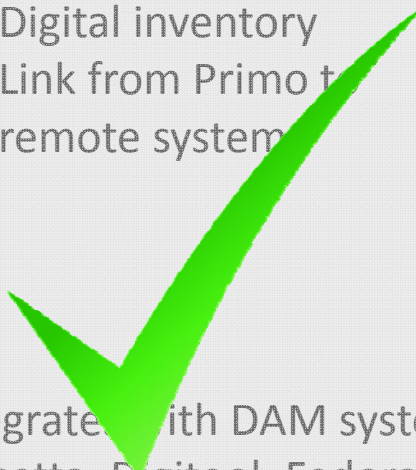
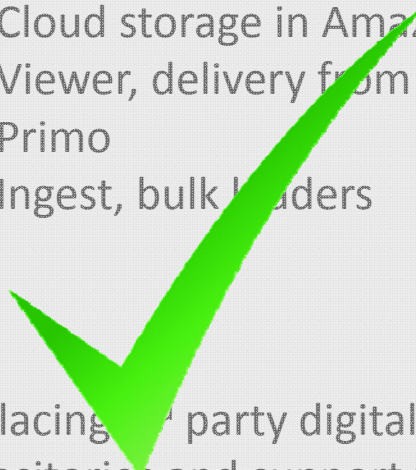
### Digital vs. Electronic

- *Electronic-* allows management of **licensed** content and access through providers
- *Digital-* allows management of *library-owned material and delivery of those files*

# Managing the Complete Digital Resource Management Life Cycle



# Managing Digital Resources with Alma

Phase 1	Phase 2	Phase 3
<b>Integration with Remote DAM Systems</b> <ul style="list-style-type: none"><li>• Harvest metadata</li><li>• Digital inventory</li><li>• Link from Primo to remote system</li></ul>  <p>Integrate with DAM systems (Rosetta, Digitool, Fedora, ContentDM)</p> <p><b>EOY 2014</b></p>	<b>Special Collections Workflows</b> <ul style="list-style-type: none"><li>• Staff deposit</li><li>• Cloud storage in Amazon</li><li>• Viewer, delivery from Primo</li><li>• Ingest, bulk loaders</li></ul>  <p>Replacing 3<sup>rd</sup> party digital repositories and support for cloud storage</p> <p><b>EOY 2015</b></p>	<b>Institutional Repository Workflows</b> <ul style="list-style-type: none"><li>• End user deposit</li><li>• Maintenance jobs</li><li>• APIs/SWORD</li><li>• Analytics</li></ul> <p>Replacement of institutional repositories including extended workflows coverage</p> <p><b>EOY 2016</b></p>



**THANK YOU**