

Workflows Q&A

Who participated in mapping the user experience journey stories for your institution? Everyone or small teams?

Margaret Heller - Generally it's small teams, either doing a walkthrough for technology needs, furniture placement, or signage.

For you Ful Overdue and Lost Loan Letter changes, does anyone still complain it's too long? Also, have you tested it for WCAG compliance?

Krystal Lewis - We've not received any complaints. We have not tested it for WCAG compliance, but our consortium, CARLI, has. CARLI has provided documentation for member libraries to implement changes, which we intend to do.

Can you provide the specifics of what CARLI helped you with?

Margaret Heller - When working with fulfillment rules in a Network Zone, it is critically important to coordiate those changes with your consortium. We worked carefully with them on planning what we were changing and how to sequence the changes.

I would be interested in how your are designing your damaged workflow. Are you actually building a workflow in Alma?

Margaret Heller - Yes, we are using Alma work orders to represent the location of books awaiting repair in Access Services, or replacement in Technical Services, and transferring the item between departments will signal work to be done.

How do you like libmaps was it worth the work you went throught to set it up?

Margaret Heller - We like it a lot. It is easy to update and popuar with staff and students.

Are these improvements only for UC or will they eventually roll out to the Alma/Primo community as a whole?

Gem Stone-Logan - All of these improvements were rolled out to the broader Alma/Primo community.

Can you provide a list of the improvements worked on?

Gem Stone-Logan - NZ/IZ Workflows:

- More visibility of NZ data in IZ Analytics via the Portfolio Details for Consortia Members folder in Analytics
- Consortial blocks for better automation in AFN [This has been released but we ran out of staff resources to fully test.]
- Allow Display Logic rules to share NZ resources at IZ level
- Enhance the FRBR & deduplication documentation, as well as the configuration options for Consortia
- Restriction of NZ Normalization Rules (Protection of NR created at NZ level to avoid changes by IZ operator at IZ level)

Infrastructure:

- Jobs performance [This resulted in the Job Progress Details]
- Delete Bibliographic Records job report is limited to 10,000 records.
- MD Import Report (currently 1000 for exporting records):
- Control of how many NEW files can be processed by Alma MD Import:
- Premium Sandboxes (PSB) performance [Ex Libris improved the underlying architecture]
- Network Zone Analytics performance [We lost one of our key people and were unable to follow through with this one.]

Documentation:

- Enhancing future release notes [Specifically, to include more NZ-specific info]
- Known Issues Portal [This one was eventually pulled from the WIP]
- Electronic Resources Documentation [Improve NZ-specific info]
- CDI (Central Discovery Index) Documentation [Improve NZ-specific info]
- Resource Sharing Guide

Support:

- Provide a Quarterly Support Report to Consortia Leadership
- Develop Consortia Subject Matter Experts at the Regional Level
- Salesforce Consortia Banner [Still in progress: the idea is support could see at a glance important configurations we have turned on]
- Define development escalation process

What was your favorite improvement?

Gem Stone-Logan - More visibility of NZ electronic resource data in IZ Analytics. This allows our institutions more visibility when troubleshooting electronic resources that are activated in the Network Zone.

Can you say what you really liked about the process for the one you liked for the process?

Gem Stone-Logan - Restriction of NZ Norm rules was my favorite enhancement from a process perspective. Maud provided very clear timelines and it was very clear what we needed to do at each step to meet our goals. She also put us directly in touch with a senior technical writer to consult on the documentation which was very nice.

Which improvement do you get the most comments about from your consortium members? Both the good and the bad? And do you have plans to try a CERV or Idea Exchange to fine tune the ones where some still want improvements?

Gem Stone-Logan - People often don't think to comment when something just works the way they expect so sometimes silence is a sign things went well. I think the NZ Analytics improvements were probably one of the most popular development items. The development escalation process has made our monthly support meetings more effective. Consortial blocks was something we really wanted but I think this is one there is still room for improvement. Once we have time to decompress, I'm sure we'll be back in CERV and Idea Exchange to promote additional improvements. Though, sometimes we find it difficult to get traction for less visible, but important backbone, areas.

Do you have any tips and tricks to recommend for others if they want to start a project like this?

Gem Stone-Logan - Start out with clear expectations and timelines. Understand that the end result is going to be based on how much time and resources you can devote to it. Ex Libris can't do all the heavy lifting. It will also probably take more time than you expect. There's a lot of hurry up and then wait.

Would you be willing to do this again? Would your consortium be willing to do this again?

Gem Stone-Logan - Yes, though at a much smaller scale. Only 2-3 every couple of years spread across different areas so one group of experts doesn't become overwhelmed.

Have you found you needed to do more physical wayfinding signs to match LipMaps?

Krystal Lewis - Yes, we discovered that some of our physical signage does not match our locations and collections names in Primo

Did it bother anyone that they had to click into a map instead of seeing the floor in the location in Primo?

Margaret Heller - No reports of this being an issue but we will continue to test.

Do you loan out equipment, such as computers, as if so, did you have to create different workflows for it?

Margaret Heller - Yes we do loan out computers. This is a pilot project, and happens through LibCal Equipment, not Alma.

Is libmap also helpful for staff with shelving?

Margaret Heller - It hasn't been used that way, we have a seperate tool for inventory. But it does help double check locations with shifting.

For LibMaps, how did you get the item's call number linked to a specific shelf highlighted in the image preview of the floor design? Can you talk about the configuration needed to link the call number to a shelf?

Margaret Heller - The location and library need to match between Primo and LibMaps and it inserts the match. The call number formatting doesn't need to match, but the locations do.