GIL Users Group Meeting 2018

The Georgia Center,
At the University Of Georgia
Athens, GA
MAY 17-18, 2018

Sponsor

ExLibris  The bridge to knowledge
GUGM Conference Description

GALILEO Interconnected Libraries, or GIL, is an extension of the GALILEO initiative funded by the Governor and the General Assembly of the state of Georgia to enhance and expand educational opportunities for the citizens of Georgia. The successes that GALILEO has had in leveling the information access opportunities for the citizens of Georgia are being extended to University System’s Libraries through GIL by providing students, faculty and staff expanded access to the information resources of the University System’s Libraries.

The GIL Users Group Meeting (GUGM) provides the opportunity for institutions using the Alma ILS to gather and exchange information with their peers. The 2018 theme, Collaborative Communities, recognizes GIL users’ dedication to excellence and the ability to work as a team to creatively solve problems using flexibility, resourcefulness, and cooperation. The GIL Users Group Meeting encourages the USG community to come together to share unique approaches to working in a collaborative and continually changing environment especially as it pertains to Alma, and its continuing refinement.

8:30-9:30 Check-in
Check in, pick up conference packets (Registration desk open 8:30-10:00); Beverage service

9:30-11:20 Opening Sessions (Mahler Hall)

9:30 Welcome and Announcements
Michael Law, Chair, GUGM Planning Committee

Opening Remarks
Lucy Harrison, Assistant Vice Chancellor for Academic Library Services and Executive Director of GALILEO

9:35-10:20 Keynote Address, The Value of a Growth Mindset Whilst Deluged by Information

Trudi Jacobson, Head of the Information Literacy Department at the University at Albany

The value of possessing a growth mindset is being promoted on a variety of fronts. In this presentation, Trudi Jacobson will consider how changes in both the information environment and libraries as workplaces emphasize the importance of such a mindset. She will reflect on evolving literacy frameworks that both exemplify and stimulate growth mindsets.

10:20-10:40 AM Refreshment Break (Hill Atrium)

10:40-11:20 Ex Libris Road Map (Mahler Hall)
Ex Libris

Alma/Primo – Roadmap Highlights

In this session, Ex Libris will highlight significant recent enhancements that have been added to Alma and Primo. In addition, the session will highlight key enhancements planned over the coming year across each functional area (metadata management, acquisitions, fulfillment, discovery, digital collection management, analytics, etc.). We will also preview the exciting new Alma AI recommendation capabilities. In addition, focus will also be placed on new and emerging capabilities for consortia. New products being developed on the Alma platform, including Leganto for course reading lists & affordable learning as well as Esploro for research services, will be briefly introduced.

Presenter: Katy Aronoff, Director of Solution Architecture
SESSIONS

11:25-12:10 Session 1
Show Your Work! Getting Started with My Dashboard in Alma Analytics

Jennifer Jones - Georgia State University

A crucial element often overlooked when tracking volume of activity, usage statistics, and change over time is making this information easy to access in a timely way. My Dashboard in Alma Analytics allows you to combine multiple Analytics reports in one area to facilitate systematic reporting, and then share the dashboard with library administrators and others in the organization who want ongoing updates and need to make decisions informed by data. During this session, attendees will get starting using My Dashboard in Alma Analytics and learn the basics of creating custom dashboards, formatting dashboards, and making dashboards available to stakeholders. Additional tips will include adding export links and building prompts into dashboards to allow for dynamic filtering.

Room: FG (47)    Track: Assessment

Using Alma Analytics for Fulfillment Reports

Mary Poland—University of Georgia
Simon Hunt —University of Georgia
Yolanda Crosby –South Georgia State College

Alma Analytics provides a robust selection of tools to collect and report data. Its design allows users to jump right in and begin creating reports. However, there is a learning curve and that learning curve can be deceptive. Some reports are simple and easy to create. Others can be more challenging. The presenters will discuss the differences in reporting between Voyager and Alma, outline the steps and features of reports they have created, and explain how they use Analytics to address various Fulfillment tasks, including working with the Fines and Fees, Users, and Fulfillment subject areas.

Room: TU (35)    Track: Fulfillment

Work Orders in Alma

Miriam Nauenburg –University of West Georgia

Work orders are designed to increase libraries’ inventory control by routing and managing items that require internal processing. Although they require more time to configure, work orders can be a useful alternative to pseudo-patron accounts. This session will introduce the concept of the Alma work order, including configuration of work order departments, types, and statuses; the work order life cycle; creation and monitoring of work orders; and common problems associated with work orders. Example scenarios will be provided.

Room: R (60)    Track: Cataloging/Metadata

New GIL Titles API

Michael Kanning —University of Georgia

This will be an introduction to the new GIL "New Titles API" - a means for getting the latest titles at your institution's library and showing them to users. The working of the API will be discussed, but the main focus will be on implementing the API in your own library's website.

Room: Q (60)    Track: Other

The Drop-In Librarian

Tamatha Lambert –Abraham Baldwin
David Edens –Abraham Baldwin

No cost library outreach to teaching faculty that trains them to use some of the tech tools available in GALILEO.

Room: VW (35)    Track: Other

OpenAthens

Tony Zanders

In this session, attendees will receive an overview of OpenAthens in a consortium environment, along with an update on the implementation roles and roadmap for GUGM. Following the presentation will be an opportunity for Q&A.

Room: YZ (42)    Track: Other

12:15-1:10 LUNCH
Lunch is served in the Banquet Area
Attendees who made special dietary requests, please present your ticket at lunch (tickets are located in your name badge holder). Thank you!
1:15-2:00 Session 2

**Getting started with usage statistics**
**Alexis Linoski - Georgia Tech**

In this session, I will share lessons learned regarding setting up SUSHI harvesting in Alma, uploading usage stats via spreadsheet into Alma, as well as navigating COUNTER and other usage reports in Analytics. Session will include live demo of accessing the COUNTER usage statistics in Alma and the basics of creating a query to meet specific needs, i.e. pulling the COUNTER stats for a single journal title.

**Room: FG (47)  Track: Assessment**

**Transiting GIL Express to Alma**
**Viki Timian — University of Georgia**
**Daron Mitchell — University of Georgia**
**Mary Poland — University of Georgia**

GIL Express policies and procedures a year in with Alma and Primo. What we have learned about the evolving end-to-end cycle of a GIL Express request and how to problem solve when things go awry.

**Room: TU (35)  Track: Fulfillment**

**Specificity In Item Material Types**
**Shelley Rogers — University of West Georgia**

Material types in item records did not migrate from Voyager to Alma in the specific types that are desired. For example, at UWG the VHS and DVD simply displayed in Primo as "videorecording" in the Get It tab, which is not helpful to patrons in determining if the resource meets their needs. Fortunately, Alma does allow specific material types to be designated. This presentation will discuss the project at UWG to convert material types. It will include how to manage sets and run jobs on items which are not straightforward conversions, such as for resources which are lost or on loan. This is a project that probably all USG cataloging departments need to tackle.

**Room: R (60)  Track: Cataloging/Metadata**

**Demand Driven Acquisitions and Alma**
**Daricus Larry — Georgia Southern**
**Debra Skinner — Georgia Southern**

Presents workflow established at Georgia Southern University for using "demand driven" acquisition as the primary means of collection development for both print and electronic materials. The emphasis is on using Alma and the Primo Gil Catalog for this process. This workflow encompasses both Cataloging and Acquisitions for monographs.

**Room: Q (60)  Track: Acquisitions**

**Determining Discovery: How First-Year Students Use Primo**
**Sofia Slutskaya Georgia Tech**
**Karen Viars — Georgia Tech**

In this presentation, two academic librarians from Georgia Tech Library use their respective experiences in instruction and technical services to outline one possible way to evaluate user experience with the Primo interface and use the assessment data to improve library instruction. The goal of the project was two-fold: gain a better understanding of the first year students’ use of the library catalog and discovery tool to inform teaching and to enable fine-tuning of the interface. To achieve this goal, a series of short exercises was implemented in English 1101 and 1102 classes. The exercises were intended to give students hands-on experience in using Primo and to increase librarians’ understanding of how first year undergraduate students use the interface. Moreover, these exercises allowed us to make decisions regarding how the interface can be enhanced and customized to improve students’ experience and their satisfaction with the library catalog. This approach has the additional benefit of illuminating new and better ways to teach the Primo interface to students to best support them in learning how to conduct academic research; it not only provides insight into the student experience, but is also a guide to better pedagogy and instructional practice when students are using a complex discovery tool.

**Room: VW (35)  Track: Assessment**
Breaking Down the Silos?: An Interlibrary Loan Discussion

Rosemary Humphrey – Kennesaw State University

Please join the GIL Interlibrary Loan Subcommittee as we host a discussion on current issues in Interlibrary Loan within the GIL community and beyond. Discussion topics will include: ILL and Alma: can they get along?, how to communicate with the GIL ILL community, new workflows that have been tried this year, and Tipasa. Additional topics will be gathered in advance via questionnaire or suggested during the session. This will be an interactive discussion with the audience.

Room: YZ (42)  Track: Fulfillment

2:10-2:55 Session 3

Course Reserves in Alma

Ben Lawrence — University of Georgia
Chris Morris – Kennesaw State University
Kell Carpenter – Georgia College and State University

Despite the exhaustive materials provided by Ex Libris, many USG libraries staff have experienced significant confusion and uncertainty when processing course reserves in Alma. These difficulties were especially pronounced at the onset of the transition from Voyager to Alma. In the months since, our team, comprised of reserves staff from UGA, KSU, and GCSU, has found elegant, streamlined solutions to many of the initial issues surrounding course reserves management. For the most part, these solutions are not easily found in the educational materials for Alma provided by Ex Libris. In our proposed presentation, our team will outline what we have found to be the most efficient and foolproof means of creating, maintaining, and removing course reserves in Alma. We will specifically address changes to course reserves in Alma as opposed to course reserves in Voyager; the creation of course reserves in Alma and the distinction between "courses" and "reading lists"; the addition of repository items, instructor copies, and e-readings to reading lists; effective means of searching for course reserves and reserve materials in Alma and Primo; integration of Alma and the course reserves software Ares; and how to remove materials from reserves. We believe that our presentation will allow for the implementation of more effective and consistent course reserves procedures throughout USG libraries.

Room: TU (35)  Track: Fulfillment

Importing and Exporting Records In Alma

Sean Purcell — University of Georgia
Simon Hunt — University of Georgia

This session will cover the methods for filtering sets, including indication rules, and also some (maybe) lesser -known features of the advanced search. Also covered will be modifying imported and exported records using merge rules and normalization rules. The goal of the presentation is for you to leave feeling comfortable importing and exporting records in Alma.

Room: R (60)  Track: Cataloging/Metadata

Processing the Community Zone Updates Task List

Kat Hart — Georgia State University

The "Synchronize Changes from CZ" job copies edits made to the Community Zone (CZ) to the Institution Zone. Alma's Community Zone Updates Task List page shows you the changes this job made to your Institutional Zone. Changes may include modifications to bibliographic records, holdings, availability, security requirements and parser parameters. However, changes made to the CZ may or may not be correct. Reviewing the task list helps you ensure your patrons have access to your electronic resources. Learn how to determine which collections need review and how to processes the CZ Updates Task List.

Room: Q (60)  Track: Acquisitions
Beyond out-of-the-box reports: tips for formatting and customization in Alma Analytics

Tricia Clayton - Georgia State University

Are you comfortable tweaking Ex Libris and community zone reports to work in your library, but want to step up your Alma Analytics game? This session will explore some methods you can use to improve the formatting, organization, and display of your data. Examples of topics to be discussed include adding prompts to reports, tricks for sorting your results, displaying your results as a chart, concatenating columns, adding row count totals, and customizing error messages.

Room: VW (35)   Track: Assessment

2:55-3:15 Refreshment Break (Upstairs Back Area)

3:15-4:00 Committee Sessions

OPAC
Room: VW (Capacity: 35)

Assessment
Room: FG (Capacity: 47)

Acquisitions
Room: Q (Capacity: 60)

Cataloging
Room: R (Capacity: 60)

Special Collections
Room: YZ (Capacity: 42)

Fulfillment
Room: TU (Capacity: 35)

MARCIVE Update for USG Federal Depository Libraries

Hallie Pritchett — University of Georgia

This session will provide an update on the MARCIVE implementation for Federal Depository Libraries in the USG since going live in the Summer of 2017. We will specifically discuss reports, troubleshooting known issues, and best practices, with time set aside for Q&A. All USG depository coordinators and depository staff members should attend.

Room: YZ (42)   Track: Other

Cancelled
The Board of Regents Library Services would like to recognize and thank everyone for all their time and effort put forth to make this year’s conference a success.

**Michael Law**  
Conference Chair  
University of Georgia

**Robin Fay**  
Conference Vice-Chair  
University of North Georgia

**Mary Poland**  
Fulfillment  
University of Georgia

**Dr. David Evans**  
Chair, GIL Coordinating Committee  
Kennesaw State University

**Kristin Nielsen**  
OPAC  
University of Georgia

**Debra Skinner**  
Cataloging  
Georgia Southern University

**Joseph Marciniak**  
Acquisitions  
University of West Georgia

**Vicki Parsons**  
Assessment  
Georgia Gwinnett College

**Dr. Sonya Gaither**  
Chair, RACL  
Gordon State College

**Jason Steele**  
ITS, GUGM 2016 website

**Alex Ligon**  
Event Coordinator  
Georgia Center

**Christina J. Zamon**  
Special Collections  
Georgia State University

**NOTES**
Providing professional services and facilities to help ensure your success

The Georgia Center
- On campus, in the heart of Athens
- 200 varied hotel rooms and suites to fit your needs & budget
- Complimentary Wi-Fi throughout the property
- Complimentary local shuttle service
- Surrounded by a vibrant community filled with art, music, sports, history, and dining

On-Site Dining
Georgia Java serves locally-roasted Jittery Joe's coffee, specialty drinks, homemade pastries, and snacks. Opens daily at 6:30am.
Courtyard Café offers quick and casual breakfast and lunch.
Savannah Room provides a relaxed atmosphere for lunch, dinner, and weekend brunch, with full bar service in the evenings.
Hotel Pantry has a selection of snacks and drinks for guests on the go.
Connecting to Wi-Fi

**eduroam Access** (including UGA MyID accounts)
- Join your device to the wireless network named “eduroam”.
- If prompted, accept the connection security certificate.
- Enter your eduroam username (i.e. myid@uga.edu, user@clemson.edu) and password when prompted.

**Access for All Other Guests**
- Join your device to the wireless network named “UGA.”
- Open your Internet browser (Safari, Explorer, Mozilla, Google Chrome) and browse to any website.
- Click on the “Accept and Continue” button on the Terms of Use page that appears.

**Business Center**
The Business Center is located on the second floor across from Room J. It is open 7am until 7pm for guests attending events. Hotel guests have 24-hour access with their hotel keycard.

**Transportation**
Complimentary shuttles are available on request to transport our hotel guests anywhere within a 3-mile radius. They depart from the Carlton St. entrance next to Guest Services.
Additionally, guests are welcome to use the university bus system, which has a stop just outside our Sanford Drive entrance.

---

**Plan an Event**
To plan an event at the Georgia Center, stop by the Sales Department in suite 298, call 706-542-2654, or e-mail sales@georgiacenter.uga.edu
<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 9:30</td>
<td>Check in, pick up conference packets (Registration desk open 8:30-10:00); Beverage service</td>
</tr>
<tr>
<td>9:30 – 9:35</td>
<td>Welcome &amp; opening remarks</td>
</tr>
</tbody>
</table>
| 9:35 – 10:20| Keynote Address  
*The Value of a Growth Mindset Whilst Duged by Information*  
Trudi Jacobson, Head of the Information Literacy Department at the University at Albany |
| 9:35 – 9:45| AM Refreshment Break                                                      |
| 10:20 – 11:20| **Ex Libris Road Map**                                                   |
| Room #     | FG (47)  | Q (60)  | R (60)  | TU (35)  | VW (35)  | YZ (42)  |
| Session 1  | 11:25-12:10| Getting started with Usage Statistics Assessment  
Using Alma Analytics for Fulfillment Reports  
Work Orders in Alma  
Cataloging/Metadata  
The GIL New Titles API  
The Drop-In Librarian  
OPEN ATHENS |
| 12:15 - 1:10| Lunch                                                                 |
| Room #     | FG (47)  | TU (35)  | R (60)  | Q (60)  | VW (35)  | YZ (42)  |
| Session 2  | 1:15 - 2:00| Show Your Work! Getting Started with My Dashboard in Alma Analytics  
Transiting GIL Express to Alma  
Specificity In Item Material Types  
Demand Driven Acquisitions and Alma Acquisitions  
Determining Discovery: How First-Year Students Use Primo  
Breaking Down the Silos?: An Interlibrary Loan Discussion |
| Room #     | FG (47)  | TU (35)  | R (60)  | Q (60)  | VW (35)  | YZ (42)  |
| Session 3  | 2:10 – 2:55| Course Reserves in Alma  
Importing and Exporting Records in Alma  
Processing the Community Zone Updates Task List  
Beyond out-of-the-box reports: tips for formatting and customization in Alma Analytics  
MARCIVE Update for USG Federal Depository Libraries |
| 2:55 - 3:15| PM Refreshment Break                                                      |
| Room #     | FG (47)  | TU (35)  | R (60)  | Q (60)  | VW (35)  | YZ (42)  |
| Committees | 3:15 - 4:00| Assessment  
Fulfillment  
Cataloging  
Acquisitions  
OPAC  
Special Collections |