ALMA IN WONDERLAND

HOW WE LEARNED TO STOP PUSHING PAPER AND LIVE IN A PAPERLESS WORLD
EMORY'S MOVE TO ALMA

Photos courtesy of Emory Photo/Video
Configurable menu, based on user roles
ALMA OVERVIEW

Configurable menu, based on user roles
ALMA OVERVIEW

Look up patron and check out items
ALMA OVERVIEW

View patron’s account
ALMA OVERVIEW

Return items & view next step
ALMA OVERVIEW

Open Analytics

Ex Libris Analytics

My Dashboard

Ex Libris

Back to Home Page

Alma

Administration

Analytics

Design Analytics

Subscribe to Analytics

Theo Acquisitions by Call # and Date

Theo Active Loans Summary

Theo All Holdings by Collection

Theo Call Number Ends in Letter

Theo Circ Log Tech Reserves

Theo Current Periodicals List

Theo Reserves

Theo Inventory Date

Theo Items Circulated v Not Circulated

Theo Item Modification

Theo List of Items by Collection

Theo Loan in Stacks

Theo Lost

Theo Missing - # of Loans

Theo Missing Searches

Theo Monthly Stats - Reserv and Fees

Theo Monthly Stats - In House Use

Theo Monthly Stats - Initial Circulation by Circ Desk

Theo Monthly Stats - Initial Circulation by Collection

Theo Monthly Stats - Initial Circulation of Eannex Keys

Theo Monthly Stats - Laptops and Tablets

Theo Monthly Stats - Modified Accounts

Theo Monthly Stats - New Accounts

Theo Monthly Stats - Renewals

Theo Monthly Stats - Returns

Theo Quality Control

Theo Quality Control Template

Theo Ready Reference

Theo Reserves Shelf List

Theo Shelf List

Theo Special Collections Missing Searches

Theo Acquisitions Summary

Library Location

Number of Items

Theo Acquisitions Summary

Active

User Group

Leans

Theo Acquisitions Summary

Active

User Group

Leans

1

ARCHIVES

103

1

Academic

50

1

Faculty

13

1

Alumni

712

1

Counselor

81

1

Distance-Ed

215

1

FAC Staff

6

1

Faculty

2,552

1

Graduate Student

285

1

Graduate Student

5,000

1

Student

4,655

1

Total

16,654
THE PROBLEMS FOR CIRC & STACKS

• Analytics (reporting app) lags 1 day behind Alma
• Printing is not built into the system
• Data downloaded from Alma directly is not customizable
PRINTING

JENNY VITTI
RESERVES & STACKS SPECIALIST
PITTS THEOLOGY LIBRARY AT EMORY UNIVERSITY
(~360,000 CIRCULATING ITEMS)
CLOUD BASED COMMUNICATION

Daniel Wehner, https://flic.kr/p/o8JRP
TRANSFERS & HOLDS

Screenshots of pop ups for transfer and hold
PATRON ACCOUNTS: PRINTING ALTERNATIVES
Borrowing Activity Letter

Dear JENNY VITTI

This is your current account summary:

**Loans**

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Fine</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The death and life of great American cities</td>
<td>12/01/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passing by the dragon: the Biblical tales of Flannery O'Connor / J. Ramsey Michaels; with a foreword by Thomas Howard</td>
<td>03/05/17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stages of faith</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Out of the depths</td>
<td>01/13/17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>For a church to come</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pieces of ease and grace</td>
<td>12/21/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deconstruction in a nutshell - a conversation with Jacques Derrida / edited with a commentary by John D. Caputo</td>
<td>12/21/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The prayers and tears of Jacques Derrida - religion without religion / John D. Caputo</td>
<td>12/21/16</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Robert W. Woodruff Library**

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Fine</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A people's history of the United States / Howard Zinn; Introduction by Anthony Arnowe</td>
<td>12/21/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roots / Alex Haby</td>
<td>12/21/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Truth / John D. Caputo</td>
<td>12/21/16</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Oxford College Library**

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Fine</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog of unabashed gratitude / Ross Gay</td>
<td>07/12/2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The color purple / Alex Walker</td>
<td>05/16/2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Account balance:

- Science Commons: 0.59 USD
- Pitts Theology Library: 2.00 USD
- Total: 2.59 USD

Please settle your account at the earliest opportunity.

Sincerely,

Emory University Libraries
RESOURCE REQUESTS & EXCEL

COLIN BRAGG
RESERVES COORDINATOR
WOODRUFF LIBRARY AT EMORY UNIVERSITY
RESOURCE REQUEST MONITORING

FULFILLMENT

Checkout/Checkin
Manage Patron Services
Return Items

Resource Requests
Pick From Shelf
Scan In Items
Expired Hold Shelf
Active Hold Shelf
Approve Digitization Requests
Monitor Requests & Item Processes

Limit results to:
Type
Request (809)
In Process (7646)

Material Type
Compact Disc (6)
CD-ROM (14)
DVD (136)
Equipment (4)
More (14)
RESOURCE REQUEST MONITORING

- Request/Process Type:
  - Acquisition technical services (5903)
  - Bindery (363)
  - Booking request (34)
  - Collection Services (134)
  - More (6)

- Pickup Location:
  - Marian K. Heilbrun Music Media (37)

Search limited to:
- Request/Process Type: Booking request
- Pickup Location: Marian K. Heilbrun Music Media
<table>
<thead>
<tr>
<th>ID</th>
<th>Creator</th>
<th>Request Type</th>
<th>Request Date</th>
<th>Material Type</th>
<th>Pickup Location</th>
<th>Start Time</th>
<th>End Time</th>
<th>Place in Queue</th>
</tr>
</thead>
<tbody>
<tr>
<td>674513567002486</td>
<td>1698830</td>
<td>Booking request</td>
<td>07/10/2016</td>
<td>Blu-ray</td>
<td>Marian K. Heilbrun Music Media</td>
<td>11/30/2016 17:00:00 EST</td>
<td>11/30/2016 21:00:00 EST</td>
<td>0</td>
</tr>
<tr>
<td>743407323002486</td>
<td>System</td>
<td>MM-VIEWING, for music media screenings</td>
<td>08/23/2016</td>
<td>Blu-ray</td>
<td>Marian K. Heilbrun Music Media</td>
<td>11/19/2016 20:00:00 EST</td>
<td>11/23/2016 10:00:00 EST</td>
<td>0</td>
</tr>
<tr>
<td>791538269002486</td>
<td>System</td>
<td>Booking request</td>
<td>09/26/2016</td>
<td>DVD</td>
<td>Marian K. Heilbrun Music Media</td>
<td>11/29/2016 12:00:00 EST</td>
<td>12/02/2016 08:00:00 EST</td>
<td>0</td>
</tr>
</tbody>
</table>
EXCEL: REQUEST EDITING & SORTING
**EXCEL: REQUEST EDITING & SORTING**

<table>
<thead>
<tr>
<th>Full Req ID</th>
<th>Create Reque Place</th>
<th>MMS</th>
<th>Descri</th>
<th>Manuf</th>
<th>Materi</th>
<th>Pickup Reque</th>
<th>Date</th>
<th>N Call</th>
<th>Nl Barc</th>
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<th>Extern Note</th>
<th>Start</th>
<th>Ti End</th>
<th>Ti</th>
<th>Cours</th>
<th>Readir Section</th>
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</thead>
<tbody>
<tr>
<td>2</td>
<td>Afro 67451: 16988: MM-VI 0</td>
<td>99003</td>
<td></td>
<td></td>
<td></td>
<td>07/10/0</td>
<td>BLU-R: 0000:</td>
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<td>11/30</td>
<td>11/30/0</td>
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<tr>
<td>3</td>
<td>Whipta 7430: Syst RENYCO 0</td>
<td>99003</td>
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<td>08/23/0</td>
<td>BLU-R: 0000:</td>
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<td></td>
<td>11/14</td>
<td>11/14/0</td>
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<tr>
<td>4</td>
<td>Winter 7624: Syst STEW 0</td>
<td>99003</td>
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<td>09/09/0</td>
<td>BLU-R: 0000:</td>
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<td>11/09</td>
<td>11/09/0</td>
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<tr>
<td>5</td>
<td>Merch 8499: Syst TEFF 0, 0</td>
<td>99003</td>
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<td>10/29/0</td>
<td>BLU-R: 0000:</td>
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<td>11/09</td>
<td>11/09/0</td>
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<td>6</td>
<td>Reven 7515: Syst BULL 00</td>
<td>99003</td>
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<td>08/05/0</td>
<td>DVD 2: 0000:</td>
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<td>11/09</td>
<td>11/09/0</td>
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<tr>
<td>7</td>
<td>Reven 7515: Syst BULL 00</td>
<td>99003</td>
<td></td>
<td></td>
<td></td>
<td>08/05/0</td>
<td>DVD 2: 0000:</td>
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<td></td>
<td>11/09</td>
<td>11/09/0</td>
</tr>
<tr>
<td>8</td>
<td>Reven 7515: Syst BULL 00</td>
<td>99003</td>
<td></td>
<td></td>
<td></td>
<td>08/05/0</td>
<td>DVD 2: 0000:</td>
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<td></td>
<td>11/09</td>
<td>11/09/0</td>
</tr>
<tr>
<td>9</td>
<td>Reven 7515: Syst BULL 00</td>
<td>99003</td>
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<td></td>
<td></td>
<td>08/05/0</td>
<td>DVD 2: 0000:</td>
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<td></td>
<td></td>
<td></td>
<td>11/09</td>
<td>11/09/0</td>
</tr>
</tbody>
</table>

**Excel Features:**
- **Paste Options:** Options to paste content in different formats.
- **Sort:** Features to sort data by various criteria.
- **Custom Sort:** Option to sort data customarily by specific criteria.
EXCEL: MACROS & PIVOT TABLES
EXAMPLE: BOOKING REQUEST MACRO
EXAMPLE: BOOKINGS PIVOT TABLE

Create PivotTable

- Select a table or range
  - Table/Range: requestWrappersList!A2:H500

PivotTable Fields

- fulRequest.title
- ID
- Creator
- Requester

PIVOTTABLE TOOLS

- ANALYZE
- DESIGN
**EXAMPLE: BOOKINGS PIVOT TABLE**

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/21/2016 13:30:00 EST</td>
<td>DVD 2826</td>
<td>Dawn of the dead [videorecording] / Herbert R. MM-VIEWING, for music media screenings</td>
</tr>
<tr>
<td>11/21/2016 18:30:00 EST</td>
<td>DVD 12906</td>
<td>Fados [videorecording] / Duvideo, Fado Filmes, MM-VIEWING, for music media screenings</td>
</tr>
<tr>
<td>11/22/2016 08:30:00 EST</td>
<td>Music and Media digital still camera</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>DSLR #04--Canon T5i</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Music and Media digital still camera.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DSLR #10--Canon T5i</td>
</tr>
<tr>
<td>11/17/2016 08:30:00 EST</td>
<td>Music and Media digital still camera.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>DSLR #06--Canon T3i</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Music and Media digital still camera.</td>
</tr>
<tr>
<td>11/22/2016 08:30:00 EST</td>
<td>Music and Media digital still camera.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>DSLR #04--Canon T5i</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Music and Media digital still camera.</td>
</tr>
</tbody>
</table>
MANIPULATING DATA: SETS & ANALYTICS

CHRISTOPHER BISHOP
USER SERVICES LIBRARIAN, AGNES SCOTT COLLEGE
FORMERLY SYSTEMS LIBRARIAN AT OXFORD COLLEGE LIBRARY (EMORY UNIVERSITY)
USING SETS TO TRACK SHORT TERM LOANS

- Overdue Reserves
  - High Demand
    - 2 hour loan
- Overdue Equipment
  - High price
    - MacBooks, iPads, chargers, etc.
    - High Demand
      - 24 hour loan
- Delay for analytics report updates
  - 7 pm each evening
SETS

• A collection of items that results from a repository search
  – **Itemized:** Static collection of individual records in the repository
  – **Logical:** Saved search queries run every time the set is referenced

• Permissions
  – Cataloger
  – Catalog Manager
  – Catalog Administrator
  – Electronic/Digital Inventory Operator
  – Repository Manager
  – Requests Operator
REPOSITORY SEARCH
REPOSITORY SEARCH
SAVING QUERIES
VIEWING RESULTS OF LOGICAL SETS
MANAGING SETS
ADDING MEMBERS
ALMA ANALYTICS
**ANALYTICS WIDGETS**

- All Two Week Old Transits
- **OXFD Claims and Lost**
- OXFD DVD Logger
- OXFD DVD with Loans and Last Loan Date
- OXFD Fines and Fees Report
- OXFD Five Days Before Lost
- OXFD Five Days Overdue
- **OXFD Missings**
- OXFD Open Fines
- OXFD Requests from Non-Oxford Libraries
- OXFD Reserves

<table>
<thead>
<tr>
<th>Active</th>
<th>Widget name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Notifications</td>
<td>Notifications Widget</td>
</tr>
<tr>
<td></td>
<td>Organization Calendar</td>
<td>Calendar Widget</td>
</tr>
<tr>
<td></td>
<td>Scheduled Jobs Status</td>
<td>The Scheduled Jobs Status Dashboard widget presents the status of scheduled jobs for the last 5 days</td>
</tr>
<tr>
<td></td>
<td>Primo Dashboard</td>
<td>Primo Dashboard Widget</td>
</tr>
<tr>
<td></td>
<td>Consortia Member Links</td>
<td>Consortia Links Widget</td>
</tr>
<tr>
<td></td>
<td>Sandbox(es)</td>
<td>Link to the sandbox environment/s that are available for your use</td>
</tr>
<tr>
<td></td>
<td>All Two-Week-Old Transits Widget</td>
<td>All items that have been in transit for more than two weeks.</td>
</tr>
<tr>
<td></td>
<td>COSS Remaining</td>
<td>All items still in the Clifton Off-Site Storage Collections by Library</td>
</tr>
<tr>
<td></td>
<td>HLTH Current Year Loans Returns Renewals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HLTH Losts &lt; 182 Days</td>
<td>HLTH items that have been lost for less than 182 days</td>
</tr>
<tr>
<td></td>
<td>HLTH Permanently Lost and Missing</td>
<td>All HLTH items currently in the Permanently Lost or Permanently Missing collections.</td>
</tr>
<tr>
<td></td>
<td>Jessica's Patron History Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>LSC Accessions</td>
<td>All Emory items in the Library Service Center by Owning Library and Collection</td>
</tr>
<tr>
<td></td>
<td>MUSME Equipment</td>
<td>All MUSME Equipment</td>
</tr>
</tbody>
</table>
HOME SCREEN WIDGETS
SCHEDULING A REPORT
QUESTIONS?
ALMA IN WONDERLAND

Christopher Bishop – cbishop@agnesscott.edu
Colin Bragg – cbragg@emory.edu
Jenny Vitti – jvitti@emory.edu

Alma documentation about the workflows we describe in this presentation and the Q&A will be added to Google Drive:

http://tiny.cc/almainwonderland