



**Response to Questions from  
California Community Colleges**

**Unified Resource Management**

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### **1. What is Leganto?**

**Ex Libris:** Leganto is a course resource list solution that provides instructors, students, and librarians with the functionality to create, maintain, and use reading lists.

More information can be found at: <https://knowledge.exlibrisgroup.com/Leganto>

### **2. What is ELUNA?**

**Ex Libris:** ELUNA stands for Ex Libris Users of North America, and it is the user group run by and for Ex Libris customers in North America. More information can be found at: <https://el-una.org/about/>

### **3. What happens if we don't arrive at 86 college minimum?**

**Ex Libris:** If less than 86 colleges opt-in for this service by Oct 31<sup>st</sup>, 2018, Ex Libris has the option to terminate the previously signed agreement for the adoption of Alma & Primo within the CA Community College System.

### **4. What if ongoing funding is not approved?**

**Ex Libris:** Each individual campus would assume responsibility for future annual subscription payments; in this unlikely event.

### **5. Will we be informed if our institution has completed/submitted all letters of intent?**

**Ex Libris:** Yes. Additionally, project staff may reach out to library staff if additional help is needed in contacting the signatory authority on your campus.

### **6. If we don't join now, are we forever locked out?**

**Ex Libris:** No. Our contract allows for late adopters, so there will be opportunities to join the project outside the upcoming fall time period. It is much simpler and easier to have all participating college migrate and implement at the same time so that the database of shared records and configurations can be set up for all participants, so Ex Libris would recommend that a college join the initial implementation wave rather than wait. Additionally, late adopters must migrate in blocks of six or more colleges, meaning your time frame to implement as a late adopter may be dependent on that of other colleges around the state. Finally, late adopters will be responsible for implementation fees, whereas colleges adopting in the fall will have these fees paid for by the LSP project.

### **7. Among the vanguard libraries, what library systems are the libraries currently using?**

**Ex Libris:** You can see the systems all colleges use on the FTS page of the CCL website:

<http://www.cclibrarians.org/directory/ftes>

The vanguard institutions have been selected to represent a cross-section of systemwide membership, including current systems, districts with single and multiple colleges, and geographic diversity.

- 8. I would appreciate some information on what the ongoing costs per institution would be in case the ongoing funding is not approved. It would help our business folks make decisions.**

**Ex Libris:** Please contact Amy Beadle for specific college costs ([abeadle@ccctechcenter.org](mailto:abeadle@ccctechcenter.org)).

- 9. The administration at my institution wants to know what kind of time resources we would need to commit to complete the transition. (I realize this would vary greatly depending on size of database and system used, but a ballpark number of hours would be helpful.)**

**Ex Libris:** The library's core project team members (this group's composition is up to your library) should be prepared to spend five to 10 hours per week on the project during the implementation period, January-December 2019.

- 10. We are in a consortium. If we choose to do this, but still have a current contract till 2021, can we migrate with group and not use until our contract runs out? Or would we run two systems?**

**Ex Libris:** From a funding standpoint, if you choose to implement Alma & Primo along with the initial group (Jan 2019 – Jan 2020), then the implementation services and the first subscription payment will have been made on your college's behalf (by the CA Legislature). As the first subscription payments are not due until "go live", the second subscription payment would not be due until Jan 2021. Additionally, funding to cover subsequent subscription payments for all participating colleges is currently being requested; and if approved, this will alleviate individual campuses from the need to fund this system themselves for a period up to five years.

In order to provide the best answer to your question about consortial relationships, we would recommend a conversation with Ex Libris staff about the nature of your current consortial setup. Any individual campus that chooses to adopt Alma and Primo along with the initial group would migrate to the same platform as the other participating colleges in order to enjoy the collaborative benefits. This should not result in any colleges using two systems, nor do we recommend this as a best practice, but there may be ways to maintain your current consortial relationships and affiliations after a migration to Alma.

- 11. My dean has a non-library background and is not clear about the benefits of going with this statewide buy... Is there a list of talking points we can use to help make the case that this would be beneficial?**

**Ex Libris:** The Library Services Platform (LSP) project is a statewide initiative to implement a unified resource management system across California community college libraries. This project will enable libraries to manage both print and electronic resources using Alma, a cloud-based library services platform. Alma is integrated with Primo, a patron-facing discovery service that provides centralized and personalized access to each participating college's library resources. Each college will have local control over functional aspects of Alma and Primo configurations, while taking advantage of shared opportunities for cataloging, e-resource data, interlibrary loan, and other services. Implementation

costs, including training and support, as well as the first year's subscription are funded by the LSP project.

The Library Services Platform project leverages an industry-leading solution to manage digital and print resources in a modern, mobile-friendly environment. Patrons can search and request resources while libraries manage all of their resources and unique materials. The platform provides libraries with the most cost-effective library management solution in the industry—supporting teaching, learning, and research.

#### Features

- Easily manage digital and print technology
- Provides data and analytics to help streamline workflows
- Includes technical support from the system level
- Gives users a mobile, modern experience on a cloud-based platform
- Creates a unified library experience across participating colleges, including familiarizing students with the same library system platform as CSU

Participating in a shared system will bring added value to your college and resources to your students, including:

#### ACCESS TO RESOURCES

- Influence policy, procedures, and best practices in library management
- Receive professional development opportunities for specialized learning
- Document library services in direct support of student success

#### COST SAVINGS

- Leverage systemwide pricing for state-of-the-art technology
- Reduce direct costs to colleges and the overall cost
- Support textbook affordability and distance education

#### SYSTEM SUPPORT

- Access expanded technical support and support from colleagues during migration
- Support student equity and access to resources by employing a statewide system
- Reduce workload by implementing identified best practices

### 12. Does it interface with Colleague?

**Ex Libris:** Yes, integrations are available with Colleague. Please see the Ex Libris Developer Network for more details about integrations with campus finance systems:

<https://developers.exlibrisgroup.com/alma/integrations/finance>

### 13. How many libraries are a part of the largest consortium you work with?

**Ex Libris:** The largest consortium live on Alma today is BIBSYS in Norway, with 120 libraries representing the vast majority of academic and research libraries in that country.

**14. Will we get credentials to walk through this sample environment on our own?**

**Ex Libris:** While it is not possible to grant access to a trial or sandbox environment at this stage of the project, all libraries implementing Alma receive training from Ex Libris and have access to their own Alma environment from a very early stage in the process. We have found that direct Alma access is more beneficial and easier to understand in the context of implementation and with some prior training.

**15. What about students paying fines online or with a pin machine?**

**Ex Libris:** Alma does not process credit card or online payments directly but supports integrations with systems that process payments. It is also possible to note these payments manually in the patron record.

**16. Can we login using our Banner credentials or using SAML?**

**Ex Libris:** Yes, SAML integration is supported:

<https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication>

**17. Acquisitions: Does this tie in with our vendor? Brodart? Etc?**

**Ex Libris:** Alma supports a range of integrations for acquisitions, from automated real-time integrations with select vendors to embedded order data processing to more manual methods of creating and sending orders. Alma also supports EDI for those vendors that support it. In order to answer questions about specific vendors, we would need to know the processes and protocols currently supported by the vendor in question.

**18. Does Alma uses Java Runtime on the browser?**

**Ex Libris:** Yes.

**19. For the single search box, can we search by course #, course ID or professor's names?**

**Ex Libris:** Yes, provided you are managing this data in Alma, it can be searched from the single search box.

**20. How is Alma scoped? Would we see only information for our college?**

**Ex Libris:** For most colleges, Alma will be scoped to include information from your college only. Some colleges that are part of an existing shared system today, such as those in a multi-campus district, might choose to migrate to a shared environment in Alma. Shared records exist in Alma at the Network Zone level, which represents systemwide shared bibliographic records and configurations, such as for shared services. Most libraries will work with local information, and relevant shared data will be available at the local level in a clearly denoted way for use in local workflows and processes.

**21. When you say “find a bibliographic record and attach an order to it”, where is that record found?**

**Ex Libris:** The ordering process in Alma involves linking a bibliographic record with a purchase order line. This bibliographic record can be created manually or located from an existing source, such as OCLC or the library catalog.

**22. Can orders be imported in bulk from a vendor?**

**Ex Libris:** Yes, Alma supports bulk import for orders, including embedded order data records and EDI.

**23. Where is the FUND information coming from? Does this mean we could somehow upload budgetary information from our college/district into Alma?**

**Ex Libris:** Yes, upload of budget information, including funds, is typically part of the integration between Alma and the campus finance system. The integration can also handle the ongoing synchronization of information between the two systems. For more information, please see the Ex Libris Developer Network: <https://developers.exlibrisgroup.com/alma/integrations/finance/fund>

**24. What does it mean that the “central office owns the record”?**

**Ex Libris:** Shared records in Alma exist at the Network Zone level. Many systems or consortia have a central office that administers the Network Zone and is responsible for the shared records housed there.

**25. Who/what is “central office” in this case? Is there an entity in that place for all colleges, or..?**

**Ex Libris:** This is up to the Chancellor’s Office. A formal governance document is currently being finalized.

**26. Can an “Institution” be a multiple college district? Or just an individual college?**

**Ex Libris:** Either of these cases—an individual college or a multiple college district—is supported in a single Alma institution, depending on the preferences of the colleges involved. This decision should be made collectively by the member colleges.

**27. Is there a reserve module or how is a local reserve collection handled in Alma?**

**Ex Libris:** Yes, course reserves are supported in Alma using fulfillment (or circulation) functionality. It is possible to manage course records, reading lists, and individual reserve items in Alma.

**28. If we have local notes in our current bibliographic records, what happens to those when we migrate?**

**Ex Libris:** Please work with the Ex Libris migration team to determine how your local notes can be migrated and mapped to local fields in Alma.

**29. Question: How is the Network Zone going to be populated?**

**Ex Libris:** The Network Zone is populated during migration. Typically, records are loaded from each institution one at a time using a process to match against existing Network Zone records. Inventory exists at the local institution level, so each college's holdings are linked to the Network Zone record where appropriate.

**30. Are 910 fields displayed to patrons?**

**Ex Libris:** Libraries have the option of displaying local fields of their choice to patrons. Alma makes use of the full range of MARC local fields. Because local fields can be defined at the level of the institution and are not shared at the Network level, each institution can use the local fields of their choice, and local fields can be used differently from one institution to another.

**31. Do we have access to Marc records without having to use OCLC records?**

**Ex Libris:** Yes, every library using Alma has access to MARC records. It is not required to use OCLC with Alma, and libraries can create original records or use records from other sources, such as the Library of Congress and other catalogs publicly available using Z39.50.

**32. Who is importing records into the NZ?**

**Ex Libris:** Policies regarding the import of records into the Network Zone will be developed systemwide during the implementation and migration process.

**33. What level will these rules be set at?**

**Ex Libris:** As we go through the Vanguard phase this fall, we will be developing Systemwide best practices and policies. Those activities will be done with the LSP Work Groups and the LSP Governance Committee. There will be lots of communication and opportunities for input. Policies developed will rely heavily on the Vanguard experience. We will also determine what Systemwide support will be necessary and how to best provide that.

**34. Can we have a preferred name field in the patron record?**

**Ex Libris:** The option to have a preferred name in the patron record is a planned enhancement on the Alma roadmap. Alma typically uses an integration with the campus student information system to create and update patron records, and if the patron's preferred name is the name of record in the SIS, this will be used to create the patron record, so there should be no need for the patron to alert the library to a name preference.

**35. Can any patron in the system request books from any of the other institutions?**



**Ex Libris:** It is possible to configure Alma to allow any patron in the system to request books from any other library in the system. It is also possible to exclude certain patron groups from the ability to request materials throughout the system or receive services at other member libraries. For example, some libraries may choose to make these services available to students, faculty, and staff only and not allow community borrowers to make systemwide requests. These configuration choices are made at the level of the institution, so each library in the consortium can make local determinations about the best ways to provide service.

**36. Fines and things stay with specific institutions, right?**

**Ex Libris:** Yes, fines are handled at the institution level in Alma, and active fines will migrate to the appropriate institution.

**37. Would we be able to restrict what types of items non-local patrons would be able to access? Our reserve books, for example, should not go out to students not from our own college.**

**Ex Libris:** Yes, it is possible to set certain resources for local circulation only through the loan rules in Alma.

**38. Are patron loads automated?**

**Ex Libris:** Yes, it is possible—although not mandatory—to automate patron loads using the student information system integration. Please see the Ex Libris Developer Network for more information: <https://developers.exlibrisgroup.com/alma/integrations/user-management/sis>

**39. Are patron permissions set by the individual college?**

**Ex Libris:** Yes, loan rules and library access are determined at the institution level.

**40. Does it ask for an override password if you don't automatically have permission, or is the transaction just blocked?**

**Ex Libris:** A transaction requiring an override is blocked until a user with the appropriate permissions enters an override.

**41. Once the item is checked out, can we set it up so that the receipt will print out automatically?**

**Ex Libris:** Yes, it is possible to configure automatic receipt printing in Alma, or to print or email receipts on demand.

**42. Would we be seeing data from all the colleges in the system, or somehow in smaller groups, or..?**

**Ex Libris:** The answer to this question depends on what type of data is in question. While some data is shared, such as bibliographic records and shared configurations, most data is not, including funds, acquisitions records, patron records, and inventory. Most institutions will work primarily with data from their library only, while some may choose to migrate to shared Alma environments within the larger system.

**43. Will we get technical support from Ex Libris, or the CCC system?**

**Ex Libris:** All Ex Libris customers have access to support through Ex Libris. CCC will also provide support to the libraries.

**44. Would the annual IPED report be available to us rather than generating by individual library every year?**

**Ex Libris:** Once a report has been built in Alma analytics, it can be run without having to rebuild the report. It is possible that the system office may choose to provide certain reports as a service to members. In either case, the IPEDs reports and other recurring reports can be set up to run regularly without intervention.

**45. What's the engine under analytics? Is it homegrown (authored by Ex Libris) or a third party product like SAP?**

**Ex Libris:** The analytics engine is Oracle Business Intelligence.

**46. Does Alma interface with PeopleSoft/Is Alma compatible with Campus Solutions?**

**Ex Libris:** Yes, please see the Ex Libris Developer Network for more information about integration with PeopleSoft for finance and student records:

[https://developers.exlibrisgroup.com/alma/integrations/finance;](https://developers.exlibrisgroup.com/alma/integrations/finance)

<https://developers.exlibrisgroup.com/alma/integrations/user-management/sis>

**47. Is there an expectation that the core team members will be working during the summer?**

**Ex Libris:** The Implementation Phase schedule is still TBD, and we've attempted to take faculty OOO periods into account in planning. There is no critical activity planned in the June-August timeframe, but of course, if the core project team is available during that period, they would benefit from dedicating time to activities like data review, third party integrations configuration and testing, and internal staff training/workflow documentation.

**48. Can we import existing reports? (from Voyager)**

**Ex Libris:** Because Alma uses a different tool for reporting and analytics and the data points are different when data is migrated to Alma, it is not possible to migrate Voyager reports to Alma. Libraries may find that common reports in use in Voyager today are available as out-of-the-box or community reports in Alma, and for anything that is not, the library can build custom reports in Alma.

**49. Can the graphs/charts be exported to Word or Excel on our desktop?**

**Ex Libris:** Yes, there are several export options from analytics, including PDF and Excel.

**50. Can we schedule the reports and deliver to email?**

**Ex Libris:** Yes, all reports in Alma analytics can be scheduled and offered to users for subscription via email.

**51. What is the time delay between Alma and analytics?**

**Ex Libris:** Alma pushes data to analytics on a nightly basis using an ETL process. Currently, this happens every 24 hours, meaning the data is always current to the close of business on the previous day. Many basic reports can be created using an advanced search in Alma itself on real-time data.

**52. How does [the concept of] shared bib records work? We've done lots of customizations to contents and abstracts, will be lose that?**

**Ex Libris:** Please speak with the Ex Libris project team to discuss your records and any local customizations you have made. It is possible to preserve these fields in migration by setting up local fields or adding them to the Network Zone record, but we need to have an understanding of which fields are in use, how they have been handled in the past, and what the library wishes to do with the fields in the migration process.

**53. Are there "reports" that perform actions on the database? e.g. to make global bib changes?**

**Ex Libris:** Global database changes are done using Alma's normalization rules and do not take place in analytics. A user can run a normalization rule on a single record or on multiple records by assembling a set of records and then running a batch job on the set. This type of reporting and action is done entirely in Alma itself, although it is possible to create a set of records for global update using the results of an analytics report.

**54. Can analytics do reporting based on bib data?**

**Ex Libris:** Yes, bibliographic data is included in Alma analytics. Depending on the query, it is often the case that an advanced search in Alma can be used to report on bibliographic data, but these fields are also available in analytics.

**55. Where is the "Demand in other lists" data coming from?**

**Ex Libris:** This data is coming from other lists managed in Alma at your institution. A user can click on the "demand in other lists" link to a list of the other reading list where a given citation appears.

**56. Where can we walk through a tour of Alma online? Any tutorials?**

**Ex Libris:** Documentation and training for Alma is available on the Ex Libris Knowledge Center: <https://knowledge.exlibrisgroup.com/Alma>.

**57. What about one course with multiple sections/instructors?**

**Ex Libris:** It is possible to manage multiple sections and/or instructors for a course, whether this means a single section with multiple instructors or multiple sections of the same course each with a different instructor. Multiple sections can use the same reading list, or they can use different ones to accommodate variations in assignments between instructors.

**58. What about one item (book) being used by multiple instructors/courses?**

**Ex Libris:** Alma can accommodate situations where the same item is in use for multiple instructors or courses. The citation and item would simply be attached to multiple lists. If it is the library's policy to acquire additional copies when the copy:student ratio reaches a certain number, the "demand in other lists" feature can help staff to make purchasing decisions.

**59. Do records in the NZ replace our need to use OCLC connection? i.e, where do we retrieve the master bib records?**

**Ex Libris:** The Network Zone represents all records in use by the system or consortium. There is an integration between Connexion and Alma, and some libraries choose to use this to push records from OCLC to Alma. It is also possible to import records from other sources using Z39.50. The decision to maintain a subscription to Connexion is entirely a local one.

**60. How does Ex Libris compare with OCLC's WMS' Knowledge Base?**

**Ex Libris:** The Alma central knowledgebase, the Alma Community Zone, contains data from more than 5,000 data sources, including vendors, publishers, and content providers. More than 20.5 million portfolios (title-level bibliographic records with linking and coverage information) can be found in the Community Zone, and there are more than 9,500 electronic collections in the Community Zone. Ex Libris' content operations team is responsible for maintaining and updating the knowledgebase.

**61. Who sets the library collection policies?**

**Ex Libris:** Library collection policies are set locally, by the institution (the college).

**62. How do find/retrieve authority records, how are they updated?**

**Ex Libris:** Authority records are housed in the Alma Community Zone, where there are full copies of the Library of Congress name and subject heading files that are updated and maintained by Ex Libris. When a change is made to an authority in use at your library, Alma notifies staff using the Authority Updates Task List, where you can easily see recent changes to authority records and act on them as appropriate.

**63. Is there a way to copy catalog?**

**Ex Libris:** Yes. In a Network Zone environment, individual libraries can attach their holdings to existing Network Zone records as a way of copy cataloging. It is also possible to pull in records from other sources using Z39.50 or an integration with OCLC Connexion.