Alma Project Requests

**Completed Projects List**

Project requests included for prioritization/reporting require more than 16 hours of FTE time across one or more FTE.

**Prioritized In Process Projects**

<table>
<thead>
<tr>
<th>Requester</th>
<th>Request Date</th>
<th>Target Completion Date</th>
<th>Prioritized Date</th>
<th>Size</th>
<th>Priority</th>
<th>Title/Scope</th>
<th>Requestor</th>
<th>Library Owner</th>
<th>Status</th>
<th>Update Date</th>
<th>Impact/Status/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alma Tech Team</td>
<td>1/1/2017</td>
<td>See individual items</td>
<td>1/1/2017</td>
<td>Medium</td>
<td>High</td>
<td>Data updates that adversely affect workflows</td>
<td>Laura Morse</td>
<td>TSWG</td>
<td>Workflows will not be possible without key updates to data in Alma</td>
<td>9/1/2017</td>
<td>Various Item Policy/Library changes, Item Processing Status Analysis/Cleanup (3/30/2019), Pseudopatron Monitoring (1/1/2019), Non-arrived item cleanup (12/24/2019), Items at status 88 (suppressed)</td>
</tr>
<tr>
<td>Alma Tech Team</td>
<td>1/1/2017</td>
<td>See milestone timeline at Data Sync Project Outline</td>
<td>1/1/2017</td>
<td>Large</td>
<td>High</td>
<td>OCLC Export - Creation of Alma to OCLC scripts for maintaining holdings &amp; OCLC Holdings Symbol Consolidation</td>
<td>Allison Powers</td>
<td>ADSC</td>
<td>Alma created holdings will not be in sync with WorldCat. Requires full synchronization of database prior to ongoing maintenance processes. There are several Harvard prerequisites prior to starting the synchronization for each symbol.</td>
<td>4/15/22</td>
<td>Status: See timeline for details.</td>
</tr>
<tr>
<td>Alma Tech Team</td>
<td>ongoing</td>
<td>ongoing</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>O&amp;M Projects</td>
<td>Tim Elliot</td>
<td>Various</td>
<td>Secure Job monitor with Harvard Key</td>
<td>4/15/22</td>
<td>Status: On hold due to higher priority work.</td>
</tr>
<tr>
<td>HLS</td>
<td>8/17/2018</td>
<td>3/31/2022</td>
<td>9/1/2019</td>
<td>Medium</td>
<td>Medium</td>
<td>SHARIAsource project (<a href="http://ils.p.law.harvard.edu/shariasource/">http://ils.p.law.harvard.edu/shariasource/</a>)</td>
<td>Corinna Baksik</td>
<td>SHARIAsource</td>
<td>Full data set from Feb 2022 has been provided to Law. Unclear what the ongoing requirements are.</td>
<td>4/15/22</td>
<td>Status: Full data set from Feb 2022 has been provided to Law. Unclear what the ongoing requirements are.</td>
</tr>
</tbody>
</table>
Due to security issues with the application, this system needs to be entirely replaced. Scoping for this project needs to be done ASAP. Below is initial scope:

- HK integration for LTS App
- Functional enhancement to use Alma API to loan carrel
- Update 1/1/2021. Inscriptio now has huge technical debt and security issues and cannot be open to the public. This needs to shift to replacement of the system. Currently, LibCal Seats does not support year-long appointments, and the map seat selection enhancement is not yet available.
- Determine if HeyCarrel is still a need with new system.

**Status:** Ready. As of 3/3/2022, there is one remaining issue related to certain Frequency Limit values not working that Springshare will fix in the April release. However, we have a working configuration that prevents users from reserving more than one carrel, so this does not prevent go-live. Access Services plans to start migration of current carrel assignments the week of March 7th.

**Stu Snydman**

12/14/2019 3/31/2022 12/16/2019 Medium High

Creation of public full export of Alma bibs/holdings/item dataset, updated with incrementals, to support BDSI POD, other requested full dataset feeds (ShariaSource), and to replace the open metadata set.

**Status:** Full data set is available and has been provided to RW. April 2022. Unclear what ongoing requirements are. POD workflow is complete and in production.

**Alma Tech Team**

1/1/2017 9/1/21 Medium Medium

Ongoing updates to HART

This work is tracked on the ARWG wiki page for known issues and enhancements.

**HGS/HKS**

4/30/21 9/1/21 4/30/21 Small Medium

Alma-D for course reserves materials

Scoping projects and determining resource needs.

- GUT - upcoming
- HKS - upcoming

**LTS**

5/5/2021 Small Medium

Upgrade Canvas Leganto LTI to LTI 1.3

Upgrading Canvas Leganto LTI (available from ExLibris in June 2021).

**Jason Clarke**

8/6/2019 Medium Medium

Analyze EZP/I/ILLiad infrastructure changes required to implement automatic patron creation from SAML data

Starting in ILLiad 9.1, ILLiad supports automatic user creation by leveraging authentication enhancements when requests are submitted to ILLiad from a non-registered user. This may finally allow patrons to skip the registration process when they submit an ILL or Scan and Deliver request for the first time. Here are the release notes: https://support.atlas-sys.com/hc/en-us/sections/360003610473-Pre-Release-v9-1-August-2019

(Note: Submitted in FP #37081 D&P). Significant analysis required to determine if this is possible in our environment and what data privacy concerns may be involved.

**HDS**

9/01/2021 9/01/2021 Small Low

Setting up My Dental Key SSO

Request to set up SSO for My Dental Key. Resource should be available for all eligible eresources users. HUIT working with vendor. SNOW tickets: INC04340090, INC043464035

**Alma EOC**

3/17/2022 6/30/2023 3/17/2022 Large Medium

Google and HathiTrust Discovery and Data Maintenance (Ongoing Data Flows, Data Sync)

Allison nearing completion of incorporating GLIB data into HART. Data discrepancies being analyzed and targeted solutions being discussed. Metadata flows to Hathi and Google have been designed and are being scripted for automation.
Requests To Be Prioritized by the Alma Executive Committee

<table>
<thead>
<tr>
<th>Requestor</th>
<th>Request Date</th>
<th>Requested Completion Date</th>
<th>Target Prioritization Date</th>
<th>Size</th>
<th>Priority</th>
<th>Title /Scope</th>
<th>LTS Lead</th>
<th>Library Lead</th>
<th>Status Update Date</th>
<th>Impact/Status/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne Adams</td>
<td>3/30/21</td>
<td></td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>Batch tool to update sets of bibs with newer OCLC copy</td>
<td>Corinna Baksik</td>
<td>Anne Adams w/ Alma TSWG</td>
<td></td>
<td>When a bib already has an OCLC number, there is no straightforward way to update it with newer copy other than one at a time. This tool would allow staff to identify sets of records in Alma that are not fully cataloged, or less cataloged, and update with newer copy from OCLC. 9/22/21 - Should be reviewed post BNS implementation to see if there is continue need.</td>
</tr>
<tr>
<td></td>
<td>1/1/2017</td>
<td></td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
<td>HFA loads</td>
<td>Corinna Baksik</td>
<td></td>
<td>Lack of new/updated HFA data in HOLLIS 9/22/21 - ITS will review and determine if this is still a continued need.</td>
<td></td>
</tr>
<tr>
<td>Alma Tech Team</td>
<td>7/1/2017</td>
<td></td>
<td>Small</td>
<td>Medium</td>
<td>Medium</td>
<td>Mispaired non-Latin fields flipped to vernacular</td>
<td>Corinna Baksik</td>
<td></td>
<td></td>
<td>Loss of non-Latin data in local records. (More detail on Known Issues page)</td>
</tr>
<tr>
<td>Andrea Schulman</td>
<td>5/31/2018</td>
<td></td>
<td>Small</td>
<td>Low</td>
<td>Low</td>
<td>Capital IQ</td>
<td>Kara Young</td>
<td></td>
<td></td>
<td>From Andrea: Like the wsj.com, it will require individual logins. They are implementing SAML for single sign-on. We have also provided a page where new users can request for an account with a Harvard email.</td>
</tr>
<tr>
<td>Library Kiosk Machines</td>
<td>5/2019</td>
<td></td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Ensure that all library public terminals have kiosk accounts</td>
<td>TBD</td>
<td></td>
<td></td>
<td>Issues with HK logins on shared public library terminals. This project would allow all HOLLIS users to have an increased logout time so they are not logged out after 45 min, a significant complaint from patrons and staff. 9/22/21 - Laura to move this elsewhere</td>
</tr>
<tr>
<td>ITS</td>
<td>7/31/2018</td>
<td></td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Order Requests</td>
<td>Bill Wash</td>
<td>ITS</td>
<td></td>
<td>System is used to triage requests largely from selectors and route internally to ITS departments. Project would analyze ways to utilize Alma or other systems to replace this system.</td>
</tr>
</tbody>
</table>
An important feature of Alma Analytics reporting is that Analytics contains a summary holding field, making it possible to easily include holdings – including serial holdings – in a tabular report. This data is critical for the purposes for collaborative collection development with our ReCAP and Ivy Plus partners – to identify strengths of and holes in holdings. This summary holdings information also serves to support several other key areas of library operations, including periodical deduplication and weeding, digitization projects, remote storage transfer projects, and more.

However, any holdings data stored in a 966 field is invisible to Analytics.

The problem is that the data in the 966 field does not populate the Analytics holdings summary field – it only recognizes the 866 field. This means that the holdings for approximately 783K records – of which 173K are serials – display as blank fields in Analytics. Without this holdings information being reportable through the holdings field, compiling this data will be complex and time-consuming.

The remedy to this problem is to convert the data in 966 fields 853 / 863 pairs via batch job, according to the following pattern:

853 02 $$8 1 $$a (*)
863 40 $$8 1 $$a [contents of converted 966]

When a 655 field is coded for LCSH and matches a non-preferred term in LCGFT, Alma flips the heading to the preferred LCGFT term but does not update the coding (it should change the 2nd ind to 7 and add $2 lcgft). This does not have an effect on patrons using HOLLIS, but the incorrect coding may cause problems in future linked data projects or migrations. Alma will continue to flip these headings so on-going clean-up may be required until after/if the Ideas Exchange is implemented: https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/36105922-preferred-term-correction-correct-coding-when-flipped

These items were suppressed from display in Aleph, but are displayed to the public in Alma. In Alma you can suppress entire holdings, but not individual items attached to holdings. Sometimes units have these items and just didn’t want them to display to the public for misc. reasons; in other cases the libraries no longer have the item. Items with this policy are not requestable by patrons.

This would allow sharing of utilities making use of write APIs while keeping the API key (and therefore Harvard data) secure. There are a number of areas where Alma write APIs could be put to valuable use at Harvard, particularly for encoding statistics information.

Prior to the implementation of MARC 5XX holding notes, important special collections information about binding, provenance etc. was added to the 852 [z a generic public display note. This problem is that this info should be searchable but because it’s in 852 [z it isn’t searchable.

Special collections info from 852 [z should be moved to 5XX notes so that 1) they are indexed 2) they display better to the user. There are too many of these to do manually.

Staff may still create 852 [z notes for content that belongs elsewhere (e.g. source of acquisitions notes, etc.) so this is also a training issue.

Complete for single volume titles.
| Kara/Resource Sharing | August 2019 | Small | Low | Use API calls to automatically create move requests for requested Borrow direct/ILL (Lending) items | Kara | Jason Clarke | So that items are automatically routed to Widener for processing from branch libraries.

1. Use SRU to get the record MMS ID — e.g. GET https://na01.alma.exlibrisgroup.com/view/sru/TR_INTEGRATION_INST?version=1.2&operation=searchRetrieve&recordSchema=marcxml&query=alma.
2. Use the 'Retrieve User Requests per Bib' API to find out whether there is a request — e.g.
   GET https://AlmaSDK-exl_impl-institutionCode-TR_INTEGRATION_INST:Almawinter2014@na01.alma.exlibrisgroup.com/almaws/v1/bibs/991181940000541/requests
3. Use NCIP to create lending resource sharing request with these identifiers which automatically creates an internal move request for the item |

| Baker Library | September 2019 | Medium | Low | Implement SSO with SANL for Financial Times.com | Kara | Andrea Schulman | Can LTS investigate the feasibility of using this method rather than the current situation with users having to sign on with Harvard email address and reactivating their access every year. |

| Alma Tech Team | 11/14/2019 | Medium | Low | Outstanding migration-related data cleanup | TBD | TBD |

* STA DELETED Bibs with attached STA SUPPRESSED Hols. This may be an accidental byproduct of the delete-holdings-bibs perlscript - Report (created 5/30/2018).
* Suppressed holdings with active items: 266,599 / 103,609 - Report needed
* Deleted bib with active holdings - Report
* Convert all remaining item status 28 items to 01

| ITS ERS | 9/30/2021 | Small | Medium | Switch Alma EZProxy prefix string from http to https | Kara | Kasia Maciak | The HL EZProxy prefix string used in Alma/Primo is still plain http:// rather than https://. One of Harvard’s e-resource vendors (ASTM) recently revamped their website, and they now state in their EZProxy stanza specs that all EZP requests must come by https, not by plain http. ITS ERS confirms that the resource is still working over plain http, but they request that we start planning to switch the EZP prefix over to https.

* Project size: small – simple change to one Alma config field, but need to test access to major resources and known http-only websites
* Project Impact: High – Updating the ezp-prod1.hul.harvard.edu integration profile prefix in Alma will affect all e-resource access over Primo that goes through the main proxy server – thorough testing will be key.

| Alma Tech Team | 12/10/21 | Small | Low | Weed Acq records for closed libraries from Alma | Corinna B akakak | A number of closed libraries remain in Alma, because the library has never weeded Acquisition records (purchase orders, invoices). LTS has removed inventory for these libraries, but the libraries themselves remained configuration in Alma because we cannot remove them while the Acq data exists. Having closed libraries in Alma causes confusion and can create unnecessary overhead during other projects. Libraries include:

* GEO, closed in 2005
* CEA, subsumed by Fung in 2005
* SOC, closed in 2009
* Hillis
* BIO, closed 2007
* PSY closed 2008
* CHE
* GEO, 2018
* LIT, 2006 (still some outstanding inventory to resolve, records were suppressed but some physical inventory still exists on shelf) |