Welcome!

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources

CARLI

OPEN OFFICE HOURS
AUGUST 27, 2020

Agenda – 8/27/2020

- September Release Updates
- Reminder: Courtesy Notices/Jobs re-enabled
- Required Alma Configuration Setting
- Printing Options in Alma
- Ex Libris Idea Exchange
- Purchase Order Line Types
- On Hold Shelf Letter local customization
- Participant Q & A

The September release is scheduled for Sunday, September 6. The regular follow-up release is on Sunday, September 13.

- Alma Release Notes: https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2020/Alma_2020_Release_Notes
- Primo VE Release Notes: https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2020/010Primo_VE_2020_Release_Notes
- Dates and links to documentation in CARLI Event Calendar.

- The layout of the Alma UI is going into production
  - Config > General > User Interface: New Alma Layout and Menu Settings
    - The new layout will be enabled in each IZ
    - Users may opt-out and in from their User menu
  - New layout becomes default in November

- New Metadata Editor (MDE) available as beta
  - Icon to show the MDE on the menu bar
  - In the MDE, click **New MDE** to use new editor
    - Catalogers may switch between UIs
    - Core functionality for editing and saving records
    - Some features not yet ready
      - Templates, Rules, Set Management Tags
  - New MDE formally goes live in January 2021

My Library Card – New Activity Filter and Indicator for Consortia

- Ex Libris added a filter above the list of member institutions. Users have the ability to select one of the following options:
  - *Has Activity* – When selected, it will display only the institutions for which the user has active fulfillment status.
  - *All Institutions* – When selected, it will display all institutions supported by the consortium.
- Ex Libris also added a *Has Activity* indicator to the left of the institutional name in the list, if they have active fulfillment statuses or messages.

My Library Card – New Activity Filter and Indicator for Consortia

CARLI re-enabling Courtesy Notices and Job this Friday, 8/28

- CARLI Office staff will re-enable:
  - FulUserLoansCourtesyLetter aka Courtesy Letter
  - "Send Courtesy Notices and Handle Loan Renewals" job

- What this means:
  - For loans with day/week/month/term loan periods:
    - The Courtesy letter is sent to patrons overnight when the "Days before due date field" value set in the companion Fulfillment job is met.
    - CARLI staff will consortially set the letter to send 3 days before the item is due for consistency for both local and I-Share patrons.

CARLI re-enabling Courtesy Notices and Job this Friday, 8/28

- What this means:
  - For loans with minute/hourly loan periods (short loans):
    - The Courtesy letter is sent to patrons before the loan is due based on a separate parameter set in Alma Configuration.
    - CARLI staff will initially set this parameter for all I-Share libraries to be 15 minutes before due.
    - If you library would like a different value, or no courtesy notice for short loans, your Alma-Primo contact should email CARLI support (ASAP!).

CARLI re-enabling Courtesy Notices and Job this Friday, 8/28

- What this means:
  - For loans with minute/hourly loan periods (short loans):
    - It is possible to have Alma send patrons a second letter at the time of charge with the due date, in addition to the courtesy notice before the item's due date/time is reached.
    - CARLI staff will initially set this second letter as OFF, so the patron will only receive one notice (the courtesy letter) for short loans.
    - If you library would like the second letter to be sent, your Alma-Primo contact should email CARLI support (ASAP!).

CARLI re-enabling Courtesy Notices and Job this Friday, 8/28

- Automatic Renewals:

  - If/when your institution is interested in testing and using Alma's Automatic Renewal functionality for local patrons, or a subset of local patrons, email CARLI Support.

  - Automatic Renewals should not yet be enabled for I-Share patrons; we need consistency across the consortium.

CARLI re-enabling Letters/Jobs for Overdue, Lost, Fine Fee Assessment on Monday, October 5.

- In September, the CARLI Office will provide more information on:
    - Which letters and jobs will be consortially re-enabled on Monday, October 5,
    - Review and clean-up to do before October 5,
    - Review of each I-Share library's Overdue and Lost Loan Profiles.

Consortially Required Default Rule Value

Located in Alma Configuration at the Institutional Level, under Fulfillment> Library Management> "Reshelve without Transit Rules."

The Default Rule must be **Reshelve Without Transit = False**

- If it is set to True, when another I-Share library discharges/returns your institution's item, the item will not go into "Transit" status.
  - It will immediately show as "On Shelf" at your institution.
- If your institution has internal libraries/departments that you do not want them to "Transit" between, enter explicit rules for those libraries/departments rather than editing the default rule.
  - https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/020Library#Configuring_Reshelve_Without_Transit_Rules
  - NOTE: Do not make any specific rules for the "Resource Sharing Library" so that it will be covered by the Default Rule=False.

New CARLI webpage- Overview: Printing Options in Alma
https://www.carli.illinois.edu/products-services/i-share/letters/PrintingOptions

- There are 6 primary "printing" options:
    - An email-enabled physical-paper-printer, so "printed" letters print directly to paper.
    - An email address as a "printer" so "printed" letters are emailed to the account.
    - Alma's Quick printing so staff can print to a computer-connected "printer" via a browser immediately; also a copy can be sent to an email account.
    - Alma's Quick printing so staff can print to computer-connected "printer" via a browser immediately; also a copy can be sent to an Alma print queue for staff to review as needed/desired.
    - A print queue for staff to review and print from as needed/desired.
    - A print queue paired with the Alma Print Daemon

Ex Libris Idea Exchange

https://ideas.exlibrisgroup.com/

- The Ex Libris Idea Exchange allows library staff at institutions using Ex Libris products to:

    - Share ideas for enhancement/development.

    - Vote to support your favorite user-submitted ideas.

    - Add comments to provide weight and additional use cases to your favorite user-submitted ideas.

- Any and all library staff members at your institution can have their own individual account.

- Please read the FAQ and Guidelines before you begin.

- The CARLI Office, and your CARLI Library Colleagues, may periodically send announcements for ideas they'd like you to consider supporting.

NEWS   JOBS   EMAIL LISTS   MEMBER DIRECTORY   CONTACT

CARLI
Consortium of
Academic and Research
Libraries in Illinois

PRODUCTS & SERVICES   MEMBERSHIP   EVENTS   GOVERNANCE   ABOUT   Search 🔍

I-Share

OVERVIEW   DOCUMENTATION   LIAISONS GUIDE   ANNUAL STATISTICS   SEARCH I-SHARE >>
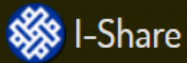
Recommended PO Line Types

Background

By default, Alma comes with over 3 dozen PO Line types, all them enabled. These PO line types are displayed as option in the pull-down list of PO line types when a PO line is created.

This screenshot shows the out of the box settings with a long list of PO line types offered at the time the PO line is created (a full list can't be captured in screenshot due to the scroll bar).

‹ PO Line Owner and Type

1 **Origami flowers / Michael G. LaFosse.**
   Book By LaFosse, Michael G. (Boston, Mass. : Tuttle 2004.)
   Update Date: -

   Description * Origami flowers / Michael G. LaFosse.

   PO line type * 🔍 Look-up or select

   PO line owner *   Recommended

   Load from template   Electronic Book - One Time

                        Electronic Book - Subscription

                        Print Book - One Time

                        Print Book - Standing Order

On Hold Shelf Letter

- Sent to patron when item is available for pickup

- Same letter for I-Share notices and Local notices

- Sent from institution that owns the item

- Letter will now differentiate between I-Share and Local notifications

- Some libraries have used this for specific instructions (curbside, scheduling appts)

- Currently Letter #84

ExLibris

On Hold Shelf Letter

04/27/2020

Campbell (CARLI Account), Debbie
100 Trade Centre Drive
Suite 303
Champaign IL, 61820-7233

Library
425 Fawell Blvd
Glen Ellyn, 60137
630-942-3364

Hello,

The following item, which you requested on 03/13/2020, can be picked up at [University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL] - Main Stacks - Main Stacks Circulation Desk.

The item will be held for you until 05/11/2020.

Please contact the pick-up library for directions on how to schedule and pick up these held materials.

Veterinary guide for animal owners : caring for cats, dogs, chickens, sheep, cattle, rabbits, and more /
By: Spaulding, C. E.

Notes that may affect loan:

Sincerely,
Circulation Department

Library

ExLibris

On Hold Shelf Letter

08/20/2020

Doe, James
1234 Main Street
Wheaton IL, 60189

Library
425 Fawell Blvd
Glen Ellyn, 60137
630-942-3364

Hello,

The following item, which you requested on 08/20/2020, can be picked up at Library - Circulation Desk Circulation Desk

The item will be held for you until 09/05/2020.

Kitchen culture : re-inventing kitchen design /
By: Grey, Johnny.

Notes that may affect loan

Library

On Hold Shelf Letter

Preview Letter · Cancel · Save

Labels · Template · Letter Examples

Managed in Network: **Yes**

XSL:

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">


<xsl:include href="header.xsl" />
<xsl:include href="senderReceiver.xsl" />
<xsl:include href="mailReason.xsl" />
<xsl:include href="footer.xsl" />
<xsl:include href="style.xsl" />
<xsl:include href="recordTitle.xsl" />
<xsl:variable name="destination_code" select="notification_data/request/work_flow_entity/destination_institution_code" />

<xsl:template match="/">
    <html>
        <head>
        <xsl:call-template name="generalStyle" />
        </head>

            <body>
            <xsl:attribute name="style">
                <xsl:call-template name="bodyStyleCss" /> <!-- style.xsl -->
            </xsl:attribute>

                <xsl:call-template name="head" /> <!-- header.xsl -->
                <xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xsl -->
```

	Enabled	Code	Description
1	⬤	additional_id	Additional Id
2	⬤	call_number	Call Number
3	◯	department	Circulation Department
4	⬤	circulation_desk	Circulation Desk
5	⬤	Bcc	None
6	⬤	Cc	None
7	⬤	notes_affect_loan	Notes that may affect loan
8	⬤	subject	On Hold Shelf
9	⬤	letterName	On Hold Shelf Letter
10	◯	sincerely	Sincerely
11	⬤	following_item_requested_on	The following item, which you requested on
12	⬤	note_item_held_until	The item will be held for you until
13	⬤	addressFrom	Your.Department@organization.com
14	⬤	can_picked_at	can be picked up at

Code	Description
additional_id	Additiona
call_number	Call Num
department	Circulatio
circulation_desk	Circulatio
Bcc	None
Cc	None
notes_affect_loan	Notes tha
subject	On Hold
letterName	On Hold Shelf Letter
sincerely	Sincerely
following_item_requested_on	The following item, which you requested on
note_item_held_until	The item will be held for you until
addressFrom	Your.Department@organization.com
can_picked_at	can be picked up at

ExLibris

On Hold Shelf Letter

08/20/2020

Doe, James
1234 Main Street
Wheaton IL, 60189

Library
425 Fawell Blvd
Glen Ellyn, 60137
630-942-3364

Hello,

The following item, which you requested on 08/20/2020, can be picked up at Library - Circulation Desk Circulation Desk

The item will be held for you until 09/05/2020.

Kitchen culture : re-inventing kitchen design /
By: Grey, Johnny.

Notes that may affect loan

Library

On Hold Shelf Letter

08/20/2020

Doe, James
1234 Main Street
Wheaton IL, 60189

Library
425 Fawell Blvd
Glen Ellyn, 60137
630-942-3364

Hello,

The following item, which you requested on 08/20/2020, can be picked up by making an appointment at the link below: https://tinyurl.com/pickup. Please pick up your materials on the 1st floor of Sharp, please bring your ID. Library - Circulation Desk Circulation Desk

The item will be held for you until 09/05/2020.

Kitchen culture : re-inventing kitchen design /
By: Grey, Johnny.

Notes that may affect loan

11	⬤	following_item_requested_on	The following item, which you re	The following item, which you requested on
12	⬤	note_item_held_until	The item will be held for you unt	The item will be held for you until
13	⬤	addressFrom	circ@library.edu	circ@library.edu
14	⬤	can_picked_at	can be picked up by making an a	can be picked up by making an appointment at the link below: https://tinyurl.com/pickup. Please pick up your materials on the 1st floor of Sharp, please bring your ID.

< On Hold Shelf Letter

Preview Letter   Cancel   Save

| Labels | Template | Letter Examples |

Managed in
Network: **Yes**

XSL:

```
<head>
<xsl:call-template name="generalStyle" />
</head>

    <body>
    <xsl:attribute name="style">
        <xsl:call-template name="bodyStyleCss" /> <!-- style.xsl -->
    </xsl:attribute>

        <xsl:call-template name="head" /> <!-- header.xsl -->
        <xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xsl -->
        <xsl:call-template name="toWhomIsConcerned" /> <!-- mailReason.xsl -->

<!-- MESSAGING FOR LOCAL REQUEST BEGINS HERE -->
<xsl:if test="$destination_code="">
                <div class="messageArea">
                <div class="messageBody">
                    <table cellspacing="0" cellpadding="5" border="0">
                        <tr>
                            <td>@@following_item_requested_on@@ <xsl:value-of select="notification_data/request/create_date"/>, @@can_picked_at@@ <xsl:value-
of select="notification_data/request/assigned_unit_name"/> @@circulation_desk@@</td>
                        </tr>

                        <xsl:if test="notification_data/request/work_flow_entity/expiration_date">
                        <tr>
                            <td>
```

← On Hold Shelf Letter

Preview Letter   Cancel   Save

Labels   **Template**   Letter Examples

Managed in Network: **Yes**

XSL:

```
                              </xsl:if>

                         </table>
                     </div>
                 </div>
                     <br />
                     <table>

                         <tr><td>@@sincerely@@</td></tr>
                         <tr><td>@@department@@</td></tr>

                     </table>
         </xsl:if>

         <!-- MESSAGING FOR LOCAL REQUEST ENDS HERE -->

         <!-- Messaging for AFN Request - DO NOT EDIT BELOW THIS LINE -->
         <xsl:if test= $destination_code!= >
                     <div class="messageArea">
                         <div class="messageBody">
                             <table cellspacing="0" cellpadding="5" border="0">
                                 <tr>
                                     <td>The following item, which you requested on <xsl:value-of select="notification_data/request/create_date"/>, can be picked up at
<xsl:value-of select="notification_data/request/assigned_unit_name"/> Circulation Desk.</td>
                                 </tr>
```

Doe, James
1234 Main Street
Wheaton IL, 60189

Library
425 Fawell Blvd
Glen Ellyn, 60137
630-942-3364

Hello,

The following item, which you requested on 08/20/2020, can be picked up at the Library - Circulation Desk Grab and Go Service Desk.

The item will be held for you until 09/05/2020.

You must schedule a pick-up appointment. Your item will not be available until you do so. For multiple requests only 1 appointment time is necessary. If you already have an upcoming appointment this item will be automatically added to the pick-up.

Please go to appointment schedule to schedule a date and time.

The Grab and Go service desk is in the vestibule of the main Library entrance on the north side of the SRC.

For questions please contact Circulation Services at circulation@cod.edu or call 630-942-2106.

You will not be able to enter the Library or access any campus services. Masks and social distancing are required. If you are experiencing COVID-19 symptoms please do not visit the campus.

Kitchen culture : re-inventing kitchen design /
By: Grey, Johnny.

Thank you!

Join us September 10
at 2pm for another
Office Hour

You can always contact CARLI at support@carli.Illinois.edu

CARLI
I-Share