



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

OFFICE HOURS
SEPTEMBER 24, 2020



Agenda – 9/24/2020

- Upcoming Alma/Primo VE learning opportunities
- Update on OCLC Data Sync
- CARLI Board of Directors' actions:
 - Due date extensions to 2/1/2021
 - Ending overdue fines and processing fees
- Fulfillment workflows/workarounds for current known issues
- Participant Q & A

Alma and Primo VE Learning Opportunities

- ELUNA Learns CARLI Pre-paid Registration Block
 - <https://www.carli.illinois.edu/products-services/i-share/alma/eluna-training-opportunity-i-share-library-staff>
- Ex Libris Alma Analytics Master Class (Free)
 - <https://www.exlibrisgroup.com/customer-education-webinars/?product=alma>
- Ex Libris Alma 2020 What's New Videos
 - https://knowledge.exlibrisgroup.com/Alma/Training/What%27s_New_Videos/80_Alma_2020_Whats_New_Videos

Update on OCLC Data Sync

- CARLI is changing your OCLC Data Sync publishing ftp connections to point at OCLC's new file exchange server by September 30.
 - Processing and matching should work the same as what we are currently seeing.
- What is coming in early 2021:
 - More detailed reports
 - Reports generated sooner
- CARLI is adding a secondary fix for LDR 00-04 containing hyphens.

Due Date Extensions 2/1/2021

CARLI Board of Directors voted to extend I-Share resource sharing due dates, and optionally local circ, to 2/1/2021

- Proposal came from many of the participants at an open discussion session for CARLI library directors held on 9/3/2020.
- The proposal that went to the Board was drafted by CARLI Office staff.
- Details were emailed to I-Share Directors, I-Share Liaisons, and Alma Primo Contacts on 9/16/2020.

Due Date Extensions 2/1/2021, upcoming work

CARLI staff:

- Will change the due date of everything* that is currently checked out in Alma and due before 2/1/2021, to be due 2/1/2021.
- Will adjust Alma Configuration to set a fixed due date of 2/1/2021 for all I-Share and local* loans for materials that are checked out in Alma.
- Will NOT enable the Alma fulfillment jobs, rules, and settings that cause either local or I-Share patrons to be further fined, billed, or blocked.
- WILL enable the jobs, rules, and settings that create overdue notices on the schedules set by the libraries.

*To opt out of the bulk due date extension for local circulation, send email CARLI support.

- This exemption can include:
 - Opting out of the one-time bulk due date extension for your patrons' loans of your items.
 - This can be for all local patrons/materials, or for a subset of local patrons/materials.
 - Opting out of the term loan due date of 2/1/2021 for *ongoing* loans of your materials to your patrons.
 - This can also be for all local patrons/materials, or for a subset of local patrons/materials.

Institutions we have heard from for requesting some exemptions for local patrons, as of noon, 9/24/2020:

- ARU
- COD
- CSU
- CTU
- DAC
- DOM
- DPU
- JUD
- JWC
- ISU
- IWU
- KIS
- KNX
- MBI
- MIL
- MLS
- MRT
- NEI
- ONU
- SAI
- SWI
- TRN
- TRT
- UIU



Ending Overdue Fines and Processing Fees

CARLI Board of Directors approved two proposals that will end the practice of I-Share libraries charging overdue fines for their main circulating collections and “processing fees” for any lost materials.

- This covers both I-Share resource sharing transactions (already overdue fine exempt) and also “local” circulation to patrons affiliated with the institution.
- At the discretion of the institution, overdue fines may still be assessed to local patrons late in returning limited access collections such as reserves, equipment, and other special materials.
- Libraries may still bill any patron for the replacement of lost materials, but may not charge an additional processing fee.

Ending Overdue Fines and Processing Fees

These proposals were discussed by the Board at their June 2020 meeting and subsequently put out for public comment.

- The comments received were overwhelmingly in support of suspending both overdue fines and processing fees.
- The comment period is now closed but those received are available for review along with background material about this policy change:
<https://www.carli.illinois.edu/call-public-comment-i-share-fines-and-fees>.

Ending Overdue Fines and Processing Fees

- These policy changes are mandatory for I-Share libraries, but all CARLI Governing Member institutions (i.e., non-I-Share) are encouraged to adopt them.
- I-Share libraries may implement these changes on their own or ask CARLI to make these policy configuration changes on their behalf.
 - This work may be done at any time and must be completed by January 1, 2021.
 - Each I-Share library should complete this form (https://go.uillinois.edu/ishare_fines_fees_end) by November 10, 2020

Ending Overdue Fines and Processing Fees

Upcoming work

- Workflow to implement changes
 - Alma Configuration at the Institutional Level >
Fulfillment >
Terms of Use (TOU) >
Loan TOU
 - Lost Item Fine (aka processing fee)
 - Maximum Fine
 - Overdue Fine
 - Recalled Overdue Fine
 - Grace Period
- Live Demonstration of Configuration

Alma and Primo VE: Known Issues

- New collated webpage!
<https://www.carli.illinois.edu/products-services/i-share/alma-primo-ve-known-issues>

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 library colleagues, may periodically send announcements for ideas they'd like you to consider supporting.

Alma Fulfillment- Known Issues

Demonstration of Workflows/Workarounds

- Alma using incorrect "On Hold" letter for incoming AFN items.
- Staff receive an error message after checking out AFN materials to a patron and clicking "Done."
- Alma does not display institutional affiliation or contact information for another I-Share library's patron with material on the hold shelf.
- Requests placed by patrons in Primo VE are canceled, even though copies should be requestable.
- Local requests converted to Resource Sharing requests stuck in "waiting to be sent" status.

- The CARLI Office currently has an open position for a Library Services Coordinator
- Required: M.S. in LS/IS and at least 1 year one year of experience working in a position with responsibilities that include using and/or supporting online library systems and services
- Full position description, requirements and application instructions as <https://www.carli.illinois.edu/library-services-coordinator-carli-0>
- Apply by October 7, 2020

QUESTIONS?



Thank you!

Join us October 8
at 2pm for another
Office Hour

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