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

PUT YOUR THINKING CAT ON:
CHOOSING DISCUSSION TOPICS FOR 2021
OFFICE HOURS
JANUARY 14, 2021

Agenda – 1/14/2021

- Office Hours: Where we've been and where we're going

- Upcoming Alma/Primo VE events and learning opportunities
  See https://www.carli.illinois.edu/calendar for CARLI events

- Reminders:
    - Re-enabling overdue notices
    - Fines and fees update
    - Reporting problems

- Choosing Office Hours discussion topics for 2021

- Participant Q & A

- January 14
- January 28
- February 11
- February 25
- March 11
- March 25
- April 8
- April 22
- May 13
- May 27

Office Hours Schedule (through May)

Topics for Office Hours Discussions
https://go.illinois.edu/officehourstopicsuggestions

Technical Services Q & A

Gather with CARLI staff and your technical services colleagues to discuss Alma technical services topics, from acquisitions and cataloging workflows for physical resources to electronic resources management:

- Wednesday 1/13 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-01-13
- Wednesday 1/27 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-01-27
- Wednesday 2/10 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-02-10
- Wednesday 2/24 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-02-24
- Wednesday 3/10 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-03-10
- Wednesday 3/24 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-03-24
- Wednesday 4/14 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-04-14
- Wednesday 4/28 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-04-28
- Wednesday 5/12 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-05-12
  Wednesday 5/26 @ 10- https://www.carli.illinois.edu/tech-services-qa-2021-05-26

Let's Talk about Fulfillment (I mean Alma, not life's purpose)

For the opportunity to talk with CARLI staff and your CARLI library colleagues about Alma Fulfillment and Automated Fulfillment Network workflows, known issues, and Q & A:

- Friday 1/15 @ 2- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210115
- Tuesday 1/26 @ 10:30- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210126
- Friday 2/12 @ 2- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210212
- Tuesday 2/23 @ 10:30- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210223
- Friday 3/12 @ 2- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210312
- Tuesday 3/23 @ 10:30- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210323
- Friday 4/09 @ 2- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210409
- Tuesday 4/20 @ 10:30- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210420
- Friday 5/07 @ 2- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210507
- Tuesday 5/18 @ 10:30- https://www.carli.illinois.edu/lets-talk-about-fulfillment20210518

Ex Libris' "Primo VE- Become an Expert"

From Ex Libris, "This course will delve into advanced topics including building effective searches, configuration, branding, normalization rules, loading external data sources, CDI, and more."

https://knowledge.exlibrisgroup.com/Primo/Product_Materials/Primo_Webinars/Primo_VE_-_Become_an_Expert

- Thursday 1/28 @ 10am – Introduction to Discovery
- Thursday 2/4 @ 10am – How Primo Works
- Thursday 2/11 @ 10am – Search Configuration
- Thursday 2/18 @ 10am – Search Interfaces
- Thursday 2/25 @ 10am – Branding, CSS, HTML
- Thursday 3/4 @ 10am - Display
- Thursday 3/11 @ 10am – Delivery
- Thursday 3/18 @ 10am – Local Data
- Thursday 3/25 @ 10am – Central Discovery Index
- Thursday 4/1 @ 10am – External Data Sources
- Thursday 4/8 @ 10am – Deduplication and FRBR
- Thursday 4/15 @ 10am – Primo Analytics

- **CARLI Resource Sharing in our New Age: Primo VE Configuration & Customizations**
https://www.carli.illinois.edu/carli-resource-sharing-our-new-age-primo-ve-configuration-customizations
Friday 1/22 @ 11am

Enabling Overdue Notices in Alma

- Overdue Notices can now be enabled in Alma.

- Sign up for meeting with CARLI staff to review settings.

- As of today:

  - 25 institutions have enabled

  - 14 have met with CARLI staff/ have a future date in mind

Ending Overdue Fines and Processing Fees

- Reminder: 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.

- I-Share Libraries filled out a survey letting CARLI know whether they planned to implement the changes on their own before January 1, 2021, or would prefer CARLI staff make these policy configuration changes on their behalf.
    - CARLI Office Staff: Work completed.
    - Library Staff: Work should have been finished by January 1, 2021.

Ending Overdue Fines and Processing Fees:
Library noted staff would make the edits

- Aurora University
- Bradley University
- Catholic Theological Union
- DePaul University
- Elmhurst University
- Eureka College
- Illinois Central College
- Joliet Junior College
- Kishwaukee College
- Lewis and Clark Community College
- Lewis University
- Lincoln Christian University
- McHenry County College

- Meadville Lombard Theological School
- North Park University
- Northern Illinois University
- Oakton Community College
- School of the Art Institute of Chicago
- Southern Illinois University Carbondale
- Spertus Institute of Jewish Studies
- Trinity Christian College
- Trinity International University
- University of Illinois at Chicago
- University of Saint Mary of the Lake Mundelein Seminary

Ending Overdue Fines and Processing Fees:
Library noted in survey no changes would be needed

- Abraham Lincoln Presidential Library
- Concordia University Chicago
- Illinois Institute of Technology
- Illinois Wesleyan University
- JKM Library Trust
- Knox College
- Lincoln Land Community College
- McHenry County College
- Millikin University
- Monmouth College
- Moody Bible Institute

- National-Louis University
- Newberry Library
- North Central College
- Northeastern Illinois University
- Oakton Community College
- Sauk Valley Community College
- Southeastern Illinois College

In most situations, please contact CARLI first at support@carli.illinois.edu for problems and questions about Alma and Primo VE

- We know our unique I-Share consortial environment and configurations better than general Ex Libris Support.
- It helps CARLI staff identify problems across I-Share institutions.
- If needed, CARLI staff will open a Case with Ex Libris and copy you so that you can participate in correspondence on the Case.
- Email to our support@carli.illinois.edu address is always better than a direct email to one staff member.

CARLI
I-Share

When you contact CARLI Support, help us to help you better and faster by including these elements in your support tickets:

- <u>Who</u>: User or patron, or user group(s) that have the issue
- <u>What</u>: MMS ID or barcode of one or more titles/items; Primo VE permalinks or search URLs
- <u>When</u>: Time the event occurred
- <u>Where</u>: What zone (IZ, NZ), library, menu, search
- <u>Why</u>: Describe the context; what you were trying to do
- <u>How</u>: Length for slow response time reports
- <u>Screenshots</u> (in Word files or PDFs) or <u>short videos</u> (with or without sound) can also be very helpful!
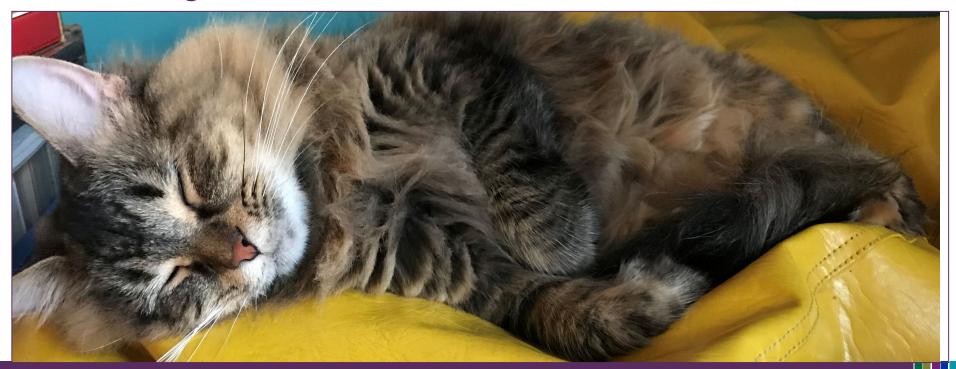
Topics for Office Hours Discussions
https://go.illinois.edu/officehourstopicsuggestions

1) Anything about office hours you have found helpful that we should keep doing?
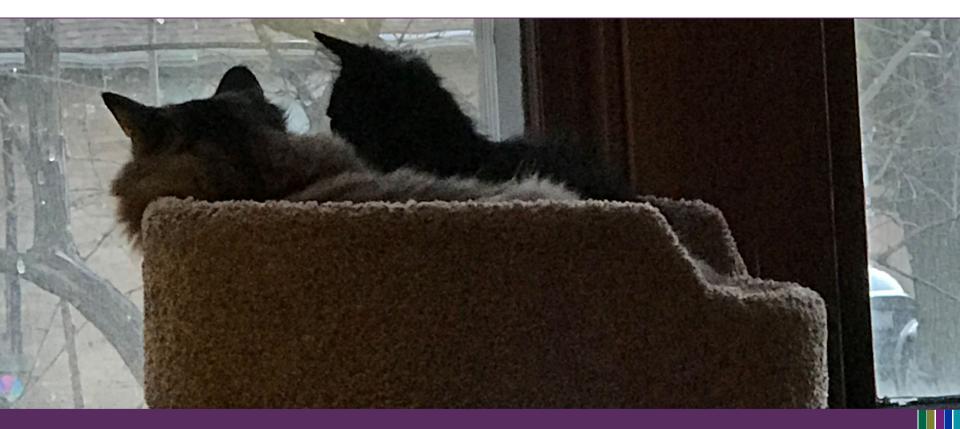
2) What could add value to office hours?

Topics for Office Hours Discussions
https://go.illinois.edu/officehourstopicsuggestions

3) What topics would you like to have active discussions about with your CARLI Library colleagues?

Topics for Office Hours Discussions
https://go.illinois.edu/officehourstopicsuggestions

4) What continued educational needs do you have at your library?

I-SHARE ALMA PRIMO VE OFFICE HOURS

Questions?

Join us January 28, 2021
at 2pm for another Office Hour.

Contact CARLI at support@carli.Illinois.edu