



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

ALMA AND PRIMO VE OFFICE HOURS
FEBRUARY 11, 2021



Agenda – 2/11/2021

- CARLI Updates
- Issue Reporting in Alma
- Q & A



- Feb. 12: [Let's Talk About Fulfillment](#)
- Feb. 19: [CARLI Resource Sharing in our New Age: Material Handling During COVID](#)
- Feb. 23: [Let's Talk About Fulfillment](#)
- Feb. 24: **CANCELED** Tech Services Q&A
- Sign up for the new [Technical Services Meetings with CARLI Staff](#)
- Thursdays through April 15 from 11:15-noon: [CARLI Discussion sessions](#) after the [Ex Libris Primo VE-Become an Expert webinars](#)

- CARLI established the Alma Primo Contacts email list to have a designated *Alma migration project* contact at each I-Share library; now that the migration is done, we are going to retire the Alma Primo Contacts email list.
- We are going to return to using the I-Share email list for CARLI staff announcements about I-Share related news and events.
- Please make sure you are subscribed to the I-Share list, go to: <https://carli.illinois.edu/mailman/listinfo/i-share>
- Anyone can subscribe to the I-Share list; only CARLI office staff will post to it.
- Please continue to use the CARLI interest group (IG) lists for email discussions with other I-Share library staff



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.



Reporting Issues with Collections and Portfolios

- If the Collection / Portfolio is active in your Institution Zone (IZ) via the Network Zone (NZ):

Report to CARLI via support@carli.illinois.edu. CARLI will follow up with any adjustments needed for access, and report the problem on behalf of I-Share to Ex Libris.

Example:

<p>DOAJ Directory of Open Access Journals (Free internet resource, activated by CARLI)</p> <p>Available from 2015.</p>	
<p>Nature Publishing (Free internet resource, activated by CARLI)</p> <p>Available from 2010 volume: 1 issue: 1.</p>	



Reporting Issues with Collections and Portfolios

- If the Collection / Portfolio is active in your IZ via the Community Zone (CZ):
Report directly to Ex Libris using the “Report to Ex Libris” functionality we’ll be describing today.

Example:

Full text availability	
American Medical Association Journals	
Available from 01/07/1998.	



“Report to Ex Libris” Functionality

- Requires a Salesforce Account with Ex Libris
- Requires CRM Contacts list to be set up in Configuration
Configuration Menu > General > General Configuration > CRM Contacts

Mapping Table Customize

Import + Add Row

No records were found.

Name

Salesforce ID

Customer Center ID

e-mail

Add Row

CRM Si Contacts


Table Description
CRM Contacts

Managed in Network
No

Customization mode:
Entire table needs to be customized



- Find the collection or portfolio with a problem
- Click “More Actions” (...)
- Select “Report to Ex Libris”

1  **Gale e-commerce sourcebook**

Gale eBooks: getFullTxt
ISBN: 0-7876-7421-4
ISBN (13): 9780787674212

Access Type: Current
Electronic Material Type: Book
Creation Date: 01/26/2021 11:06:57 CST
Modification Date: 01/26/2021 11:28:53 CST

Orders: 1
Portfolio ID: 5321059980005
Service ID: 6220989990005
Collection ID: 6120990000005
MMS ID: 9932651410705

[Additional order](#) [Edit Portfolio](#) [...](#)

- View
- Create E-Activation Task
- Test access
- Delete
- Move
- Report To Ex Libris**
- Deactivate
- Display in Discovery

[Other details](#)

Report To Ex Libris

Back Send

Report To Ex Libris

Contact name: * Importance: * Normal

Subject: * Gale e-commerce sourcebook

CRM Category: * Title level issue CRM SubCategory: * Add title(s)

Description *

Additional info: ===== DATA INFORMATION =====
CKB ID/CZ MMS ID: 99346000000081568
LOCAL MMS ID: 9932651410705879
TITLE: Gale e-commerce sourcebook
ISBN: 0-7876-7421-4
LOCAL E-COLLECTION ID: 6120990000005879

Live Demo



More Information

- Alma CRM

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/050Configuring_General_Alma_Functions/100Configuring_CRM_Contacts](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/100Configuring_CRM_Contacts)

- See section “Editing a Portfolio Using the Electronic Portfolio Editor” subsection “Coverage”:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/010Managing_Electronic_Resources#Coverage_tab](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/010Managing_Electronic_Resources#Coverage_tab)



Thank you!

The next Open Office Hours will be on February 25th

