



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

END OF TERM USER MANAGEMENT

OFFICE HOURS

MARCH 25, 2021

Agenda – 3/25/2021

- Reminders and upcoming Alma/Primo VE events and learning opportunities
See <https://www.carli.illinois.edu/calendar> for CARLI events
- End of Term User Management Activities
 - Identifying graduating students
 - Setting expiry dates
 - Patron purge techniques

The April Release is scheduled for Sunday, April 4.

- The April release is a “maintenance release”—no new functionality, no release update on April 11.
- Alma Release Notes:
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2021/Alma_2021_Release_Notes
- Primo VE Release Notes:
https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2021/010Primo_VE_2021_Release_Notes
- Dates and links to documentation in CARLI Event Calendar.

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 4/14 @ 10- <https://www.carli.illinois.edu/tech-services-qa-2021-04-14>
 - Fiscal Period Close
- 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>

Recordings are posted on the “Physical Resource Management - Cataloging and Acquisitions” page:

<https://www.carli.illinois.edu/products-services/i-share/physical-res-man>

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 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>

Notes are posted in the calendar event for past sessions.

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 4/1 @ 10am – External Data Sources
- Thursday 4/8 @ 10am – Deduplication and FRBR
- Thursday 4/15 @ 10am – Primo Analytics

Recordings from past sessions are available at the link above.

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.

Join CARLI Email lists at <https://www.carli.illinois.edu/email-lists>
I-Share Announcements from CARLI: I-Share@carli.Illinois.edu

CARLI open discussion lists on Alma and Primo VE

[Primo VE Interest Group](#)

[Public Services Interest Group](#)

[Reports Interest Group](#)

[Resource Sharing Interest Group](#)

[Serials & Acquisitions Interest Group](#)

[Technical Services Interest Group](#)

Ex Libris User Group (ELUNA) Email Lists for all customers

<https://el-una.org/about/mailing-lists>

- [Alma-L](#)
- [Primo](#)

What do we mean by “activities?”

- Patron maintenance tasks that libraries expect to perform
 - Patron loads to reset expiry/purge dates or change user groups
 - Identifying graduating students and their loans/fines/fees.
- Tasks that CARLI expects libraries to perform
 - Purge expired user records
 - Purge I-Share linked users with no loans

Reporting on graduating students

- User statistical categories
 - Configuration > User Management > User Details > Statistical Categories
 - C > UM > User Details > Category Types
 - C > UM > User Details > Statistical Categories/Types
 - C > Analytics > General Configuration > Analytics User Statistics
- Create user set, run Update/Notify Users job to add category
- Use analytics to find current loans and fines
 - Start with a report that pulls Primary Identifier by stat category
 - Use the above analysis to find loans and fines/fees
 - CARLI staff can also use the above analysis to match with other IZs.
 - Contact support to request your users' activity at other institutions.

Adjusting functionality for these students

- Idea might be to limit loan lengths, block renewals or new loans
- Custom user groups, e.g., Graduating Student
 - Configuration > User Management > User Groups
 - Configuration > User Management > User Record Type/User Group
 - Configuration > Fulfillment > Fulfillment Units: Add rules and TOUs
- Update expire dates for graduating students to end of semester
- Apply a network block on user records

We have not tested some of these options extensively yet.

CARLI expects that libraries will periodical purge old user data

- Protects PII, anonymizing analytics
- Keeps institution data up to date
- Cleans up after AFN processes
- Purge is preferred over manual deletion of users

Purge job does not:

- Delete users with active transactions in your IZ*
 - Purge job is not AFN-aware; it may purge users with I-Share transactions.
- Delete users that have no purge date

To run a purge, staff must have the User Administrator role; or contact CARLI Support for assistance.

Analytics:

- Users that have purge dates in the past
- Users with outstanding fines-fees with purge dates in the past
- Library Staff Users Have Purge Dates in the Past
- Users that have no purge dates assigned

IZ Users Advanced Search

- User Group
- Expiration Date
- Purge Date
- Last Activity Date

Admin > User Management > Purge User Records

- Number of days after purge date
 - Pick a date and identify the difference, e.g., from 12/31/20 to 3/25/21 = ?
 - How powerful is “0” days?
- User record type: Usually keep All—need to check this again, have seen this be weird.
- User Group: leave blank for all, or select a single group
 - Selecting a group means running multiple purge jobs, but this may be B.P.
- Waive threshold: How much in fines/fees to forgive in order to clean-up data.
 - Above threshold, user retained
 - Default is 0
- Add vs. Close vs. Add and Close
 - Add queues the job while letting you stay on the screen to run more groups, which you probably will do

Create a list of “OK to Purge” users.

- In Config, create a user group, “OK to Purge.”
 - Configuration > User Management > User Groups
 - Configuration > User Management > User Record Type/User Group
- Use an advanced search or analytics report to create a set
 - Be sure to create an itemized set
- Run the Update/Notify Users job to set the new user group
- Run the purge job, limited to the OK to Purge group.

Additional good/best practices for purges

- Set purge dates predictably
 - Always set a purge date
 - Always keep purge date the same or after expiry date
 - Consider having purge dates at fixed points during the year
- Use SIS user loads/syncs to update expiry and purge dates
 - After students graduate
 - After faculty/staff retire or leave the institution
- Scan for expiry and purge dates for users with staff roles
 - Recommend running this kind of report once a month

Questions?

**Join us April 8, 2021
at 2pm for another Office Hour.**

Contact CARLI at support@carli.illinois.edu

Session Chat for March 25, 2021

00:18:14 Holly Nordheden: FYI for next session. Please assume we know nothing about end of year procedures. There's a number of us libraries new to Acquisitions who will be going through this for the first time!

00:18:59 Jen Masciadrelli, CARLI (she/her): @Holly - yep, we'll be starting from scratch. We had just a few libraries do rollover in Alma last year but we know most will be doing it for the first time this year.

00:19:37 Jen Masciadrelli, CARLI (she/her): @Holly - I also understand what does it mean just in general.

00:20:20 Holly Nordheden: Thanks, since we haven't used Acquisitions in more than a decade and there's no corporate memory on what it might have involved ...

00:28:47 Sharon Nelson: Do statistical categories on patron records get overwritten by patron loads?

00:31:37 Barber, Evan M: Is there a way to bulk switch records to internal to prevent changes via patron loads?

00:32:53 Barber, Evan M: We'd like to shorten the due dates for graduating patrons and don't want that overwritten

00:35:02 Gail Heideman - Greenville University: Would you have to manually create a graduating group?

00:35:13 lwild: How do you create the pool of users to do these jobs on?

00:45:40 Laurie Sauer: When you create the itemized set of users from a file, are there required fields?

00:47:09 Ted Schwitzner, CARLI (he/him/his): User name

00:47:13 Laurie Sauer: Sorry, did you say username column heading? And that column contains the primary id?

00:53:56 Ted Schwitzner, CARLI (he/him/his):
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/030User_Management/030Purging_Users](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/030Purging_Users)

01:09:49 Jessica: Is there a way to exclude graduating seniors from the purge if they're also incoming graduate students for next year/term?

01:12:02 Barber, Evan M: Excellent!

01:12:40 Laurie Sauer: Voyager records migrated to Alma with purge dates far in the future. Does the purge date have to be in the past in order for the purge users job to work?

01:15:46 Gretchen Schneider: How do we avoid purging patrons with AFN items checked out that do not have fines and fees?

01:23:30 Gretchen Schneider: So then update those patrons with new purge date before purging, right?

01:24:03 Gretchen Schneider: Will the report provide the purge and expiration dates?

01:24:42 Gretchen Schneider: That would be great!

01:24:55 Gretchen Schneider: At least purge. Could use to find ones to fix

01:25:31 Amanda Pippitt (Millikin Univ.): so you would use that report to edit a set of patrons with past purge dates? and then use that edited set to run your purge?

01:26:50 Gretchen Schneider: Could you show in a future office hours how to do that?

01:27:02 Gretchen Schneider: Thank you!

01:27:04 Aimee Walker - JOL (she/her): Is it a problem if we purge a patron in our local database that still has I-Share items checked out? We found a lot of I-Share patrons in our local database that we can't update because they're no longer in their local institution's database

01:28:51 Aimee Walker - JOL (she/her): Thanks. That was kind of a two-parter because of the experience we've had with clean-up so I was curious if it's really a problem.

01:28:51 lthompson: Thanks!

01:29:24 Barber, Evan M: So much good and timely info, thanks Ted

01:29:45 Marcella Nowak: this was great Ted. Thank you

01:30:07 Sagmoen, Sarah: Yes, many thanks. This is exactly what we're starting to work on.

01:30:16 Sharon Nelson: you too, thanks!

01:30:17 Gretchen Schneider: Thank you!

01:30:19 Stephanie Henricks: thanks!