
**2019–2020 CARLI Resource Sharing Committee:
Annual Report of Activities and Projects**

Members

Belinda Cheek	(2017–2021)	North Central College
Kari Garman	(2018–2021)	Bradley University
Shelly McDavid	(2019–2022)	Southern Illinois University Edwardsville
Sarah McHone-Chase	(2017–2021)	Northern Illinois University
Marcella Nowak	(2018–2021)	College of DuPage
Janelle Sander	(2020–2022)	University of Illinois at Urbana-Champaign (joined January 2020)
Hilary Meyer	(2019–2019)	Triton College (July 2019 to December 2019)
Nathan Thebarg	(2018–2021)	Trinity International University
Ashtin Trimble	(2018–2021)	Black Hawk College
Erin Zimmerman	(2019–2022)	Heartland Community College

CARLI Staff Liaisons: Debbie Campbell, Lorna Engels, and Bradley Woodruff

CARLI Board Liaisons: Jeff Douglas, Knox College and Jacob Jeremiah, Oakton Community College

The Resource Sharing Committee met in person at the CARLI Office on September 4, 2019. Other meetings typically took place via online conference call on the first Wednesday of every month (11:00-12:30 PM). The committee has encountered some challenges this year: while we were aware that we would be preparing for the Alma/Primo VE migration, we had not anticipated doing so while under pandemic conditions. Our committee primarily meets online, so the Illinois shelter-in-place order did not impact our regular operations; although some technical issues were encountered due to working from home as opposed to our offices. We completed necessary testing of Alma and Primo VE online without much inconvenience and were able to work on documentation collaboratively online. A major impact of COVID-19 on Resource Sharing was that much of the resource sharing activity in the state (and the nation) ceased completely or was severely restricted. Thus, a topic of conversation in each committee meeting for the last several months of FY20 was the state of library operations and the continuation of services at our respective institutions, a trend that will likely continue throughout FY21.

In late June, the committee received word of Lorna Engels's death. She had been one of our liaisons for many years, and her absence is keenly felt. The committee expresses their deep sympathy to her friends, family, and colleagues.

Completed Terms

Due to the Alma migration, CARLI determined that committees should keep current membership, to the extent possible, in order to allow the continuation of the work from this current year in light of "future work" still required for Alma and Primo VE. In addition, the Resource Sharing Committee decided to keep the current co-chairs in place for FY21.

Committee Charge

The Resource Sharing committee charge is to identify, develop, and encourage cooperation in sharing the consortium's collective resources. The committee has historically centered this charge around traditional interlibrary loan material services, but this year we've been working with a broader definition of consortial

resource sharing, including additional staff workflows for day-to-day processes and the sharing of knowledge more broadly in the consortium.

Theme

Migration from Voyager ILS to Alma ILS with the Primo VE Discovery layer.

Annual Project

With the migration from Voyager to Alma, the Resource Sharing Committee focused their work in FY20 on multiple smaller projects, instead of one larger research project. These projects are outlined below.

Cleaning Patron and Transactional Data:

The CARLI Resource Sharing Committee researched best practice thresholds for Voyager patron records, checkout transactions, and fine and fees clean-up for both local and I-Share patrons. The CARLI Office has had several questions sent to CARLI Support seeking guidance on database cleanup before the production-load data migration, and as such, the committee has reviewed how Voyager patron data migrated into Alma during the test load, alongside reports of historical patron lost item and fine/fee behaviors.

Personally identifying information is exceptionally valuable, and the storage of it is a liability. In accordance with the CARLI Privacy Policy, “CARLI takes the collection of personally identifiable information required to provide library services very seriously. It is our policy to store personal information in our systems for the shortest amount of time necessary to complete transactions or provide service.” We want to avoid migrating any more patron data than necessary from Voyager to Alma; the migration provides us a good opportunity to “clean house” following best practices.

On [December 6, 2019, the CARLI Board](#) approved the [Resource Sharing Committees plan](#), to post these recommendations to the CARLI website along with tips and tools for managing the cleanup process. In February, the CARLI Office asked the I-Share Liaisons to submit a survey selecting one of the outlined patron record/transaction clean-up options and thresholds. The patron record clean-up work was completed by the I-Share libraries and CARLI office staff before the June Voyager-to-Alma production data extract, with some final steps in the process completed in Alma after migration.

Initial Alma Policy Decisions:

In preparation for the migration from Voyager to Alma, the Committee reviewed the Voyager-specific settings determined in the [Universal Borrowing Standard Settings](#) and translated them into the settings available in Alma.

Some notable changes:

- In Voyager, it was possible to a library’s local patron group (for example, faculty, students, staff) map to one of several consortial user groups (UBReg, UBLong, UBIN, UBNonCirc); in Alma, all I-Share eligible patron groups map to only one consortial user group, named I-Share. As such, the committee agreed upon consortial loan and requests settings for the I-Share user group.
- In Voyager, the timings and charges assessed for overdue and lost materials were set for each individual patron group/item type combination. The Committee decided on the overdue and lost settings to enable for the I-Share patron group overall.

Testing Alma and Primo VE:

The entire Resource Sharing Committee [worked on requesting in PrimoVE and processing requests in Alma](#). This testing was done with the participation of other I-Share libraries not represented on the committee.

Workflow testing was continued from home during the COVID lockdown with the aid of a Google doc, which allowed items to be tracked as they virtually went through the automated fulfillment process from original request through the loan and return to the lending library.

Alma Glossary Subcommittee:

This subcommittee included Debbie Campbell, Lorna Engels, Kari Garman, Megan Kelly, Jennifer Masciadrelli, Shelly McDavid, Sarah McHone-Chase, Deborah Morris, William Schultz, and Nicole Swanson. The subcommittee worked with the CARLI Technical Services committee to combine 2 glossaries, that of Harvard and of Ex Libris. We also added our own terms based on our own experiences in learning Alma and what we thought might be useful to others. Additionally, we extended an invitation on the glossary web page linked below, to the consortium at-large to make suggestions for new terms to add:

<https://www.carli.illinois.edu/products-services/i-share/alma/glossary>

Printing Subcommittee:

This subcommittee included Debbie Campbell, Belinda Cheek, Lorna Engels, Marcella Nowak, Janelle Sanders, Nathan Theborge, and Bradley Woodruff. The subcommittee met 4 times January-mid March, and during that time they reviewed the wording and formatting of the [two consortially-managed Alma letters](#) that are primarily used in the AFN. The subcommittee then tested and edited those letters until deciding on their final format. In addition, the subcommittee troubleshooted some of the common printing problems that they found while testing the letters.

Reserves Subcommittee:

A subcommittee consisting of Debbie Campbell, Belinda Cheek, Lorna Engels, Marcella Nowak, and Nathan Theborge, reviewed available documentation on reserves processes from Ex Libris and other individual libraries and consortia using Alma, to draft how-to directions on managing course reserves, reading lists, and citations. Some testing was also done regarding the searching of Reserve materials in PrimoVE.

The webpage with those steps is in process at the time of this report: https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_reserves

Damaged Materials Subcommittee:

Shelly McDavid and Erin Zimmerman are the members of this subcommittee. They reviewed the existing content on the CARLI Webpage for: [I-Share Best Practices: Damaged Items](#).

This work is still in process at the time of this report. Both team members collaborated on proposed changes to the existing webpage, that now need to be reviewed by the Resource Sharing committee and then updated on the website by CARLI.

Lost Items Subcommittee:

The I-Share member libraries follow best practice workflows for day-to-day transactions that impact the consortium as a whole. One of these best practices is how to deal with items borrowed by patrons that reach lost status, and then are returned. At the June 2020 meeting, the RSC formed a subcommittee with Kari Garman, Ashtin Trimble, and Janelle Sander as members, to draft an initial set of steps for processing materials lost by patrons in Alma.

This work is still in process at the time of this report. The subcommittee has reviewed our historical Voyager documentation on working with lost items in Voyager, read through current Alma documentation from Ex Libris, and is working on the first draft of the workflow steps for the committee to review.

Alma Related Webinars:

Due to the COVID-19 pandemic all in-person activities were cancelled starting mid-March. Debbie Campbell presented virtually for the committee at the April 2nd, 2020 PSC/IC Forum at Joliet Junior College. [PrimoVE & the Automated Fulfillment Network \(AFN\): A Demonstration](#)

Future Plans

- The CARLI Board has asked committees in FY21 to consider their charge, including if/how it should be modified for the future.
- The Committee will continue finalizing documentation begun during FY20.
- Documentation and projects to work on in FY21
 - Updating the I-Share Resource Sharing Code to not be Voyager-specific
 - Workflows for recording non-I-Share ILL transactions in Alma
 - Continual gardening of Alma/Primo VE documentation in light of updates
 - Monthly review of Alma/Primo VE release notes
 - Testing/writing Alma and Primo VE Analytics reports
- The committee will explore wrap around services to complement the existing Fulfillment and Resource Sharing services for the consortium (for example, additional methods of resource sharing that would affect all the I-Share institutions).
- Other tasks as they arrive