Notes from the CARLI Primo VE – Become an Expert Discussion Section on "Delivery" -- March 11, 2021
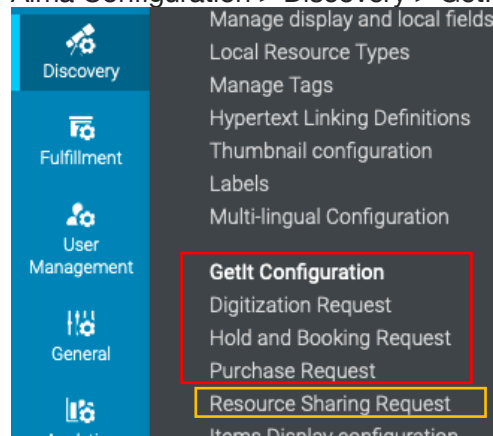
Even CARLI office staff admit to a little confusion about the word "delivery"! We think of it as delivery of a book to a person rather than a service. The names of a lot of their services are so similar (GetIt, ViewIt, HowToGetIt).

Request Forms
JOL: Are we able to edit the Holding/Booking Request form locally? I saw there were some CARLI edits, so I wasn't sure if that is a form we're able to edit.

CARLI: I-Share institutions can edit the **Digitization Request** form, **Hold and Booking Request** form, and **Purchase Request** form, but do not edit the **Resource Sharing Reques**t Form.

Alma Configuration > Discovery > GetIt Configuration

The **Resource Sharing Request** form is the one that handles I-Share/AFN requests, so CARLI has requirements for this form and maintains it for all I-Share institutions.

JOL was asking because of a specific issue: they just starting to handle local requests again and the "Not Needed by" field is turned on by default. A User put a date needed by and the hold shelf expiration date is overridden by it.

CARLI: it could be useful if Patrons used it/applied it appropriately, for example, they could keep a hold longer if a patron used it to keep second hold longer, but many I-Share institutions have reported that users seem to be putting today's date in the field thinking they will get it sooner.

QCY: We found the same issue too. Ours was set up as Pickup Date. Users were putting the date they filled out the form as the date that they wanted to pick it up. Our night staff picks up the items and then I process them in the morning. In the morning, it was telling me to re-shelve the book because the date was yesterday.

TIU: The March release did something related to the "Date Needed By," and there was some chatter on the listserv about it. See the "Enhanced request cancellation after 'date needed by' has passed" section for the Ex Libris documentation:
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2021/Alma_2021_Release_Notes?mon=202103BASE

CARLI: The March update makes it so the "not needed by" date will be used for even more things to cancel requests than before. I-Share institutions could change label to be more explanatory than "Not needed after" to help patrons use the field correctly, but it might be easier to just turn it off because of its ability to cancel requests.

Many attendees on call agree that might be the best idea/recommendation for the local request form and/or they have already turned it off. CARLI hid the "Date Needed by" date field on the Resource Sharing Request form for I-Share/AFN requests already.

To disable this field for Local requests, go to:
Alma Configuration > Discovery > GetIt Configuration > Hold and Booking Request and set the Field "notNeedAfter" to No in the Display to Public column.

Booking Requests
JUD: What is booking?
CARLI: Could be booking a room or equipment, for example.

GRN: Has anyone done Booking Requests? I'd like to set that up for booking study rooms (in this case they would be booking the keys, really, not the rooms).

JOL: I'd be curious about booking requests as well. Our IT dept is doing away with the software we use to book study rooms and I was hoping Alma/Primo might be an alternative so we don't have to license more software that won't integrate with our SIS. During implementation, I had heard some not-so-great things about booking in Alma so I was curious if anyone had luck.

CARLI Office hasn't heard of any institutions doing booking requests and no one present at the session seems to be using it as of now (especially with libraries closed so no study spaces are needed). Booking equipment might be done via course reserves rather than booking requests.

GRN: I got stuck on the ALMA instructions and couldn't get it set up.

Ex Libris document links on Booking Requests
https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Booking%2C_Reading_Room

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/030Booking/010Booking_Workflow
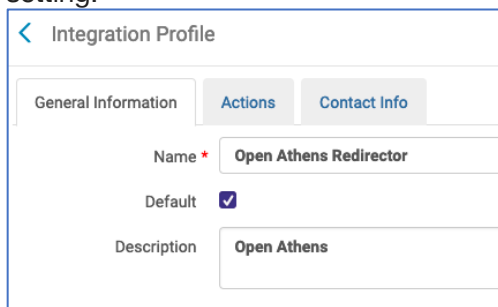
Proxy settings for resources
SIM: I asked a question in the webinar regard General Electronic Services (GES) and if a logic rule could be set up to bypass OpenAthens authentication for a free resource, e.g., DOAJ journals, etc.
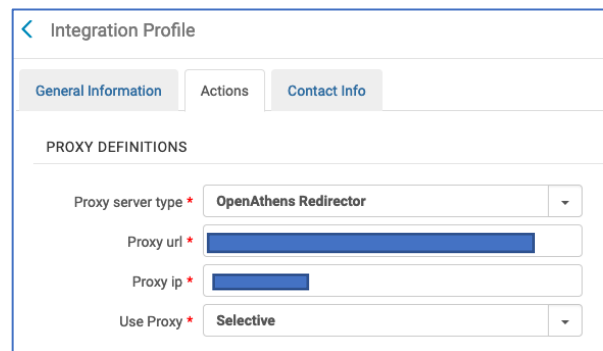
CARLI: Don't activate the proxy on free resources universally across the entire catalog. Instead, make the Proxy Selective.

Demo by CARLI staff: Go to Alma Configuration > General > External Systems > Integration Profiles > Resolver Proxy Integration type.

On the General tab, you select if it's Default or not but then, under Actions tab, the use proxy can be "Selective" or "Always" [or "Never"]. If you choose Selective, then Alma will follow the proxy profile for the service/collection/portfolio—which you set in Alma for the resource's specific proxy setting.

Integration Profile		
General Information	Actions	Contact Info
Name *	Open Athens Redirector	
Default	☑	
Description	Open Athens	

Integration Profile		
General Information	Actions	Contact Info
PROXY DEFINITIONS		
Proxy server type *	OpenAthens Redirector	▾
Proxy url *		
Proxy ip *		
Use Proxy *	Selective	▾

The proxy at the Portfolio level then overrides the proxy at the Service level. You set the proxy at the service level so you don't have to set it for every individual title. If you are still cleaning up P2E and the URLs came over from Voyager, the proxy would have come over with them and you don't want to apply the proxy a second time. There are directions on the CARLI P2E clean-up page for how to remove proxy strings.
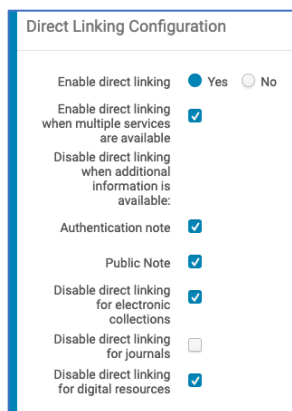
Direct Linking
Ex Libris documentation on Direct Linking in Primo VE
Direct linking configuration enables the user to skip the Services page and menu in Primo VE and link directly to a digital or an electronic service (such as full text).

GRN: Has anyone set it up or have recommended settings?

NLU has it set up in their Primo VE. NLU's configuration in Alma Configuration > Fulfillment > Discovery Interface Display Logic > Direct Linking is:

In Primo VE when Direct Linking is on, if you click on the Title text in the Brief Results list, it goes to full record page. User must click on "Available online" text in the Brief Results list to invoke the Direct Linking.

Direct Linking is a global configuration for Primo VE and might require you to clear your browser cache or use a private browsing window, but changes to it should be reflected in Primo VE almost immediately. Note that you can't test Direct Linking on a specific Primo VE View though because this setting applies to all Views.

GRN: Wondering about the multiple services option. In the presentation it sounds like it might be better to uncheck it? Any benefit to disabling for each of the resources.

The Direct Linking option "Disable direct linking for digital resources" won't apply to I-Share institutions since that would be for AlmaDigital which CARLI does not have.

The option "Disable direct linking for electronic collections" refers to the bib record for the Collection if you have it visible.

TIU also has Direct Linking set up in Primo VE, but they have noticed that if the one service is provided by CARLI from the NZ, then Direct Linking doesn't work. Is that expected? For example, CARLI ebooks don't click through even when you have direct linking enabled.

Specific example:
ProQuest title opens record instead of going to the service: https://i-share-mls.primo.exlibrisgroup.com/permalink/01CARLI_MLS/1fr761p/alma991154425023805816

CARLI: This might be a matter of CARLI changing how the information is shared out from NZ. CARLI staff will look into reconfiguring those settings because it really does look like there is something on the NZ side that CARLI needs to fix for the shared resources. We can set them up in inventory groups and then test it to see if it will work. Anything with direct linking might not ever work 100% of the time, though.

LEW: Direct linking didn't work 100% of the time in Summon either, but I'm glad to know now that it is an option in Primo VE.

Display Logic Rules
[CARLI has several webpages about Display Logic Rules](#) with information on how to set them in Alma for specific outcomes in Primo VE.

Holdings Display Fields
CARLI asks the attendees a question about holdings displays: out of the box, Primo VE comes with a few MARC fields displaying (852, 866, 867) with four other holdings fields configured but toggled off by default (868, 541, 561, 563). Would I-Share institutions be interested in CARLI distributing out a full set of common/typical MARC fields for holdings that I-Share institutions could choose from? Even if the fields are distributed from the NZ, each institution could choose whether they wanted the field to be displayed by toggling on/off the display and/or adjusting the Labels. MANY attendees think that would be helpful and better than having to configure the fields themselves. Due to this positive feedback, CARLI will work on this and will send a note to our email lists when we have more information.

Ex Libris documentation on configuring holdings display fields in Primo VE:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Holdings_Display_Fields_for_Primo_VE

ILL Services besides ILLiad and Tipasa
COD: Do you have any information on setting up ILL if we don't use either ILLiad or Tipasa? We use OCLC directly.
CARLI: We'd need more information to help you with this. If you can send a question to Support and we can look into it.

JOL: You might want to look on the Ex Libris Developer Network, too. There might be something on there. I've found it very helpful.

JUD uses LibWizard and a GES for OCLC ILL.

Some other institutions are using a GES to link out to home-grown forms or pages for ILL.

CARLI: Any service with an OpenURL can be used in a GES to prepopulate forms with data.