Documents Shared During Today's Session

Holdings and Item Displays in Primo VE

https://www.carli.illinois.edu/products-services/i-share/discovery-interface/holdings_items_displays

Technical Services, Cataloging and Acquisitions documentation

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

How-To: Changing Holding/Item Records Permanent Locations

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

How-To: Withdrawing Inventory and Deleting Records

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

Moving item records between holdings

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

Technical Services Work-from-Home Projects

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

Deleting Acquisitions Data

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

Electronic Resource Management

https://www.carli.illinois.edu/products-services/i-share/electronic-res-man

Setting up OpenAthens as a Proxy Redirector Service

https://www.carli.illinois.edu/products-services/i-share/external-system/OpenAthensProxy

Setting up Vendors for SUSHI Harvesting of Usage Data

https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/sushi

Alma Configuration and Administration

https://www.carli.illinois.edu/products-services/i-share/alma-config

How-To: Delete a Location

https://www.carli.illinois.edu/products-services/i-share/alma-config/delete-location

Session Chat

00:09:55   Jessica Gibson (CARLI):   https://www.carli.illinois.edu/products-services/i-share/discovery-interface/holdings_items_displays

00:13:42   Gail Heideman: If the 852 $z is not showing, is there a link to how to make them show in Discovery?

00:18:32   Ted Schwitzner, CARLI (he/him/his):   https://www.carli.illinois.edu/products-services/i-share/discovery-interface/holdings_items_displays

00:21:08   hnordhed: Some of the 853/863 volume display info does look funky. Ex. from:pt.2 until:pt.3

00:22:07   Ted Schwitzner, CARLI (he/him/his):   That's the "system-generated" summary that Jessica mentioned

00:23:24   hnordhed: It will be very nice to have the 845 display since we have public performance information and had been copying into a subfield z public note too

00:34:07   Brent Eckert: Would that also suppress items for monographic records with process type "acquisitions"?

00:34:33   Sharon Nelson: When we're using Receive and the Duplicate function there, we are NOT seeing all of the item record info. come over (particularly copy numbers and item policies). We then have to go in and edit the item record to add these. Are we doing something wrong or is this a "feature"?

00:40:57   Sharon Nelson: That's what I was afraid of, but thanks for the clarification. :-(

00:43:58   Gail Heideman: Are the available sort fields coming from the item record or the holdings record?

00:44:43   Gail Heideman: okay, that is what I thought

00:45:49   Cindy Bowen: I wish it was possible to have journals display the most recent at the top but have multivolume books display in ascending order (i.e. with #1 at the top) in Primo... but having just one 'default' sort for the Get It doesn't seem to allow for that

00:47:32   Gail Heideman: @Cindy, could you do that by using the enumeration for one type of material and chronology for another?

00:49:05   Gail Heideman: Could you explain the "default" thing again?

00:50:19   Jessica Gibson (CARLI): To quote the documentation: "The 'Resource management Get It results' option allows you to define various sort routines that can be used for Primo/Primo VE, but only the routine that is marked as the default will be used."

00:51:44   Gail Heideman: okay, that makes sense

00:55:07   Gail Heideman: So, for "Get It" if we set it so we have a Receiving sort that only has Volumes, but for a record we don't use Volumes, what will the sort order be?

00:55:12   Brent Eckert: There is no option to have different sort routines for different types of material, is there?

00:57:48   Gail Heideman: I just added the Received one

00:58:29   Gail Heideman: Yeah, I just added them. Playing with it

00:59:20   Gail Heideman: okay, that makes sense

01:00:34   Mary Konkel: Alma had a distinct personality-- gotta love it

01:06:36   Ruth Lindemann: We're still unclear about how to include Acquisitions into book serials titles. Is there a point in the documentation to see that?

01:07:08   Cindy Bowen: can we rely on the OCLC sync to remove our OCLC holdings when we weed titles, or do we need to do that step ourselves?

01:11:01   Brent Eckert: Can you please explain what SUSHI is?

01:13:25   Rosalie Resendiz (she/her):   Bound-with question. A patron requested a title that was part of a bound-with. I created the host bib record in IZ, relinked the item record (with the process type Requested) to the host-bib, and suppressed the host-bib. The Build Record Relations job removed the Process type and we lost the request. Is there a way to prevent this? Would it have been better to process the request before the Build Record Relations job runs or would that have caused a different problem for Fulfillment?

01:14:28   Cynthia Scott: In the past, even recent past, Sushi hasn't been as reliable as one would hope. Sometimes Sushi required as much clean up so it seemed better to just getting it directly from a vendor. Has that changed and is it better?

01:15:58   Cynthia Scott: Thanks. I will try it.

01:18:28   Ruth Lindemann: When we get a new title in a series we had prior to to Alma not quite sure how to handle it.

01:18:38   hnordhed: Something like the Reference shelf series that has individual titles, and others can be cataloged as serials

01:19:03   Mary Konkel: What's the future of 590s in bib records? We're using IZ and they migrated just fine. They are typically notes like: LIBRARY RETAINS: Latest edition or LIBRARY HAS: v. XX-XX There are appropriate holdings and items attached. While somewhat repetitious, it's a quick way for us to easily identify earlier editions which are to be discarded when the later edition comes in.

01:19:36   Brent Eckert: We have been using field 866 instead of 852 $z for our summary holdings statements such as "Library retains one year only". Is that going to be a problem?

01:19:53   Ruth Lindemann: Thank you that would be helpful.

01:20:38   Mary Konkel: @Brent We also use 866 for free text notes like Current XX year only

01:21:06   Gayle Porter: ---Is it possible to search Alma for acquisitions info (to get price, etc.) by book title?

01:21:12   Cindy Bowen: okay... I just wanted to check on that, since we've got some weeding on the agenda for summer

01:21:24   hnordhed: Carli had originally been saying OCLC deletes were a problem with serials. Is that still true?

01:22:24   hnordhed: It's why we manually deleted periodical titles when removing our print serials

01:23:12   Gloria: We've also realized that when we move our PO for an electronic title to a CZ record and then delete our local record, our holdings are being removed from OCLC (for those CZ records that do not have an OCLC #)

01:23:46   Gail Heideman: What I've been doing with Withdrawn items is spot checking 2 days later and they are usually gone.

01:24:18   Cindy Bowen: thanks! I'll keep an eye on it and raise any issues I come across :)

01:26:36   Rosalie Resendiz (she/her):   Ok. Will do.

01:28:39   Mary Konkel: THANKS

01:31:31   Brent Eckert: So, should we think about some method of moving the data to 852 $z?

01:33:21   Gail Heideman: I need to do that process this summer.

01:34:46   hnordhed: We have some "extinct" shelving locations and were told it would be easier to delete them in Alma. What instructions do we follow for that?

01:36:34   hnordhed: Great!

01:36:57   Ted Schwitzner, CARLI (he/him/his):   https://www.carli.illinois.edu/products-services/i-share/alma-config/delete-location

01:38:23   Gail Heideman: Thanks for your help!

01:38:32   Rosalie Resendiz (she/her):   Thank you!

01:38:34   Sharon Nelson: Thank you!

01:38:34   Cynthia Scott: Thanks. Great call!!

01:38:38   Jodi Craiglow: You, too! Thanks!

01:38:39   Amanda: Thank you!