



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 PRIMO VE OPEN OFFICE HOURS
JUNE 9, 2022

USER MANAGEMENT: TIMELY TIDY TASKS

Agenda – 6/9/2022

Announcements and Reminders

User Management: Timely Tidy Tasks

- Patron Purge aka Purging User Records
 - Overview
 - Local User Records
 - Linked User Records
- Anonymization
 - Overview
 - Consortial Plans
- Future Office Hours
 - User Management: Starting Steps

Announcements/Reminders

Upcoming Office Hours

- 2022 Office Hours have been scheduled – 2nd Thursday of each month, 2pm-3pm.
- Next session: July 14, 2022
Topic: User Management: Starting Steps

The CARLI Office will be closed on Friday, June 17th in observance of Juneteenth.

Announcements/Reminders

Technical Services Q&A Sessions

- Scheduled for once a month from 10:30am-12:00pm
- Upcoming Dates: Summer pause; watch for future announcement
- Registration will be open and available on the CARLI Calendar

Let's Talk about Fulfillment (I mean Alma, not life's purpose)

- Current sessions scheduled for every other week, alternating Tuesdays at 10:30am and Fridays at 2pm.
- New timeline for late summer/fall 2022; will be announced soon.
- Registration open and available on the CARLI Calendar
- June 10: Calendar Maintenance and Open Q & A
- June 21: Ghosted Resource Sharing Transactions and Open Q & A

Shared Document Depository

<https://www.carli.illinois.edu/products-services/i-share/i-share-documentation/shared-documentation>

The depository contains documentation submitted by CARLI member libraries for the benefit of the broader community.

Workflow topics include: Acquisitions, Analytics, Cataloging, eResources, Fulfillment, Primo VE, SIS, Users and more.

Note: The documentation is not peer-reviewed; it is up to those using the documentation to determine whether the information is still valid, accurate, and of use for their purpose.

User Management: Timely Tidy Tasks

- Patron Purge, aka Purging User Records
 - Overview
 - Local User Records- your steps
 - Linked User Records- CARLI plans
- Anonymization
 - Overview
 - Consortial Plans



PURGING USER RECORDS: OVERVIEW



Purging User Records: Overview

- What is Patron Purge?
 - In Alma, called “Purging User Records”
 - Process of deleting user records in bulk
 - Local User Records
 - Linked User Records
 - Different Alma Analytics results than **deleting** a single user record from within Alma

Purging User Records: Overview

- What is Patron Purge?
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 - Process of deleting user records in bulk
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 - Linked User Records
 - Different Alma Analytics results than **deleting** a single user record from within Alma
- Why is Purging User Records important?
 - [CARLI Privacy Policy](#)

Purging User Records: Overview

- Different Alma Analytics results than **deleting** a single user record from within Alma

The screenshot shows the Alma user management interface. The top navigation bar includes the Brookens Library logo, search filters (Users, All, PastPurr), and the user's role (Brookens Library - Library Circulation Desk). The main content area is titled 'Find and Manage Users' and shows a list of users. The first user is 'CARLI, PurgeTest', with an active status, internal account type, public record type, and faculty user group. A context menu is open over the user record, showing options for 'Edit', 'Delete', and 'View hidden'. The 'Delete' option is highlighted with a red box, and a large red 'NO!' is overlaid on it, indicating that deleting a user record is not the correct method for purging.

Active	Name	Account Type	Record Type	Job Category	User Group	Expiration date	
<input checked="" type="checkbox"/>	CARLI, PurgeTest	Internal	Public	-	FACULTY	05/30/20...	...

Purging User Records: Overview

- Patron Purge vs. Anonymization
- Data maintained with Patron Purge
 - Configuring User Deletion:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/040Configuring_User_Management/100Configuring_Delete_User_Policy_Settings](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/040Configuring_User_Management/100Configuring_Delete_User_Policy_Settings)
 - CARLI required setting:
Keep statistics and remove primary ID (recommended) – The user's statistical data is retained: that is, all non-identifying statistical data, (such as the user group and job category) are retained, as well as data on the Statistics tab. The primary ID is removed and an internal unique Alma ID is moved into the last name. All other data is deleted.

Purging User Records: Overview

- How does Purging User Records work in Alma?
 - Admin job
 - Admin > User Management > Purge User Records
 - Role needed:
 - User Administrator
 - Input parameters:
 - Number of Days After Purge Date
 - User Type
 - User Group
 - Waive Threshold

Purging User Records: Overview

- User record purge availability:
 - Balance due on their *local* account is below “waive threshold”
 - No outstanding *local* loans.
 - No assigned PO lines, POs, or invoices.
 - No locked bibliographic records.
 - No assigned import profiles.
 - Not working in the MD Editor.
 - Not currently locked by a running job.
 - No associated assets or grants (If Esploro is enabled for your institution)
 - **NOTE: DOES NOT CHECK AFN ACTIVITY.**

Purging User Records: Overview

NOTE: DOES NOT CHECK AFN.

Known Issue: Alma's User Purge job is not AFN aware
(posted 3/15/2021)

<https://www.carli.illinois.edu/products-services/i-share/alma-primo-ve-known-issues>

Idea Exchange:

<https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/44761048-user-purge-should-be-made-afn-aware-and-not-allow>

Purging User Records: Overview

- What's the worst that can happen?



Purging User Records: Overview

- Workflows: Local vs. Linked User Records



PURGING USER RECORDS: LOCAL USER RECORDS



Purging User Records: Local User Records

<https://go.illinois.edu/UserPurge>

- User purge is a blunt instrument
 - Key requirement: User record purge date is in the past
 - Exceptions: User has active transactions (loans, fines, fees)
- Best practices for purge
 - Review reports to select users that should be purged
 - Rather, exclude records that you know that you shouldn't purge
 - Look at different user groups, outlier data on specific users
 - Create a user set, exclude records with I-Share activity
 - Update set of users to have a clear “OK to Purge” user group
 - Run purge on the approved set of users

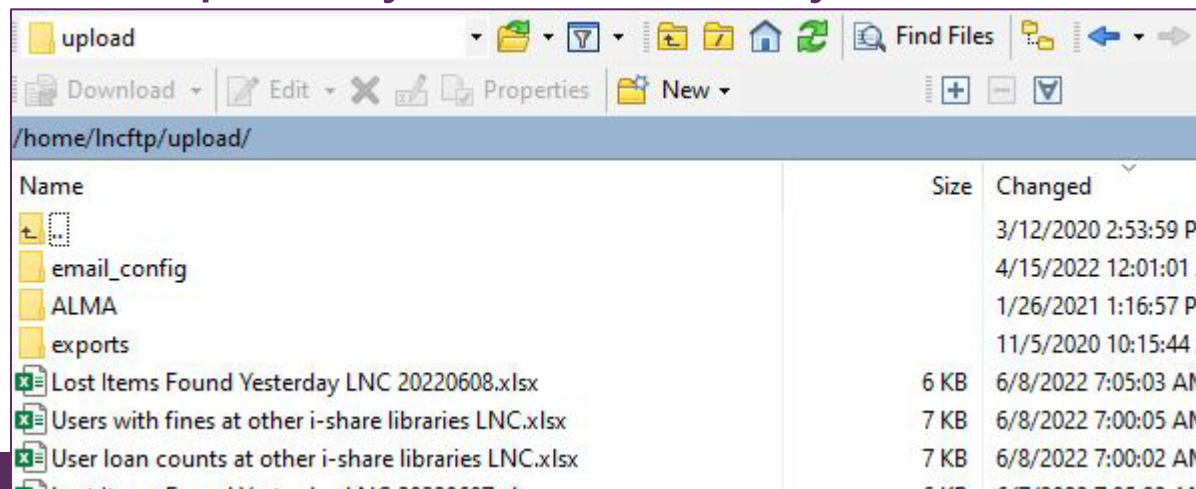
Start with Reports

- Users with Purge Dates of Current Date or Earlier
 - In CARLI's shared folder: User Management Reports
 - Identifies users eligible for purge with no conditions
 - *Days between Today and Purge Date*
 - Calculated based on current date and purge date
 - Use this to guide your criteria on the purge job

PRIMARYIDENTIFIER	User Group	Expiry Date	Purge Date	Days between Today and Purge Date	User Id
27611000048473	RESIDENT	5/13/2022	4/27/2022	43	1362779940005858
000000015	STAFF	5/13/2022	8/31/2021	282	1362707170005858
000005680	STUDENT (LINCOLN)	5/13/2022	8/31/2021	282	1363964170005858
000005765	STUDENT (LINCOLN)	5/13/2022	8/31/2021	282	1466482110005858
000316	NORSTUDENT	5/13/2022	8/31/2021	282	1362946890005858

Start with Reports

- User loan counts at other I-Share libraries xxx.xlsx
- Users with fines at other I-Share libraries xxx.xlsx
 - Identify users that have activity in other I-Share libraries
 - Exclude these users from purges
- PIDs for users with loans or fines at other i-share libraries XXX.xlsx
 - Contains primary identifiers only



Create User Sets

- Admin > Manage Jobs and Sets > Manage Sets
 1. Create a set for the users with purge dates in the past
 2. Create a set for the users with I-Share activity

Manage Sets GuideMe Back

My Sets Public Sets All Sets

1 - 1 of 1 Name

+ Add Set Share Settings

Content Type : User Content Origin : All

Active	Name	Type	Content Type	Content Origin	Created	...
<input checked="" type="checkbox"/>	All LNC Users	Logical	User	Institution only	05/13/2022 15:19:19 CDT	...

Logical
Itemized

Filter the First User Set

- Admin > Manage Jobs and Sets > Manage Sets
 1. Select the set of users with purge dates in the past
 2. Actions menu button > Combine Sets
 3. Update your set name
 4. Select NOT as the combine operator
 5. Select set for users with I-Share activity

Content Type : User Content Origin : All

Active	Name	Type	Content Type	Content Origin	Creation Date	
<input checked="" type="checkbox"/>	Users with activity at other I-Share libraries 6/9/2022	Itemized	User	Institution only	06/09/2022 11:34:17 CDT	...
<input checked="" type="checkbox"/>	NORSTUDENT Users with purge dates in the past 6/9/2022	Itemized	User	Institution only	06/09/2022 11:31:57 CDT	...
<input checked="" type="checkbox"/>	All LNC Users	Logical	User	Institution only	05/13/2022 15:...	...

- Edit
- Members
- Duplicate
- Combine sets
- Delete

PURGING USER RECORDS: LOCAL USER RECORDS

< Set Details Cancel Submit

General information

Set name *

Description

Note

Set content type **User** Set type **Itemized**

Private Yes No Status Active Inactive

Creation date **06/09/2022 11:31:57 CDT** Created by **carli_admin**

Updated by **carli_admin** Content Origin **Institution only**

Set ID -

Combine sets



Combine **NORSTUDENT Users with purge dates in the past 6/9/2022**

Operation

With * X ☰ ↺

Modify Users to be “OK to Purge”

- Admin > Manage Jobs and Sets > Run a Job
 1. Select the Update/Notify Users job
 2. Select the combined user set
 3. Select the user group field, “OK to Purge” as new group
 4. Run the job

<input type="checkbox"/>		to	<input type="radio"/> External <input type="radio"/> Internal
<input type="checkbox"/>	Send notification to user	Identity Service mail	▼
<input type="checkbox"/>	Expiry date	<input type="text"/> 	Unconditionally ▼
<input type="checkbox"/>	Purge date	<input type="text"/> 	Unconditionally ▼
<input type="checkbox"/>	Status	Active ▼	Unconditionally ▼
<input checked="" type="checkbox"/>	User group	OK to Purge ▼	Unconditionally ▼
<input type="checkbox"/>	Campus	<input type="text"/> ▼	Unconditionally ▼

Run the User Purge Job

- Admin > User Management > Purge User Records
 1. Add a job
 2. Select Public; Select OK to Purge as user group
 3. Set the Number of days after the purge date
 4. Set the Waive threshold
 5. Add and Close to run the job

Add Job

Number of Days After Purge Date	<input type="text" value="90"/>
User Record Type	<input type="text" value="Public"/> ▼
User Group	<input type="text" value="OK to Purge"/> ▼
Waive Threshold	<input type="text" value="9.99"/>

**PURGING USER RECORDS: LINKED USER RECORDS
(AKA: I-SHARE PATRONS, AFN)**



Purging User Records: Linked User Records

- Linked User Records:
 - Are copies of patron home records copied to other IZs for transactions.
 - Have I-Share user group.
- CARLI Office staff will:
 - Manage the purging of the I-Share user group records.
 - Finalize steps to routinely purge linked user records that are no longer needed for transactions.
 - Send an announcement once steps are in place.

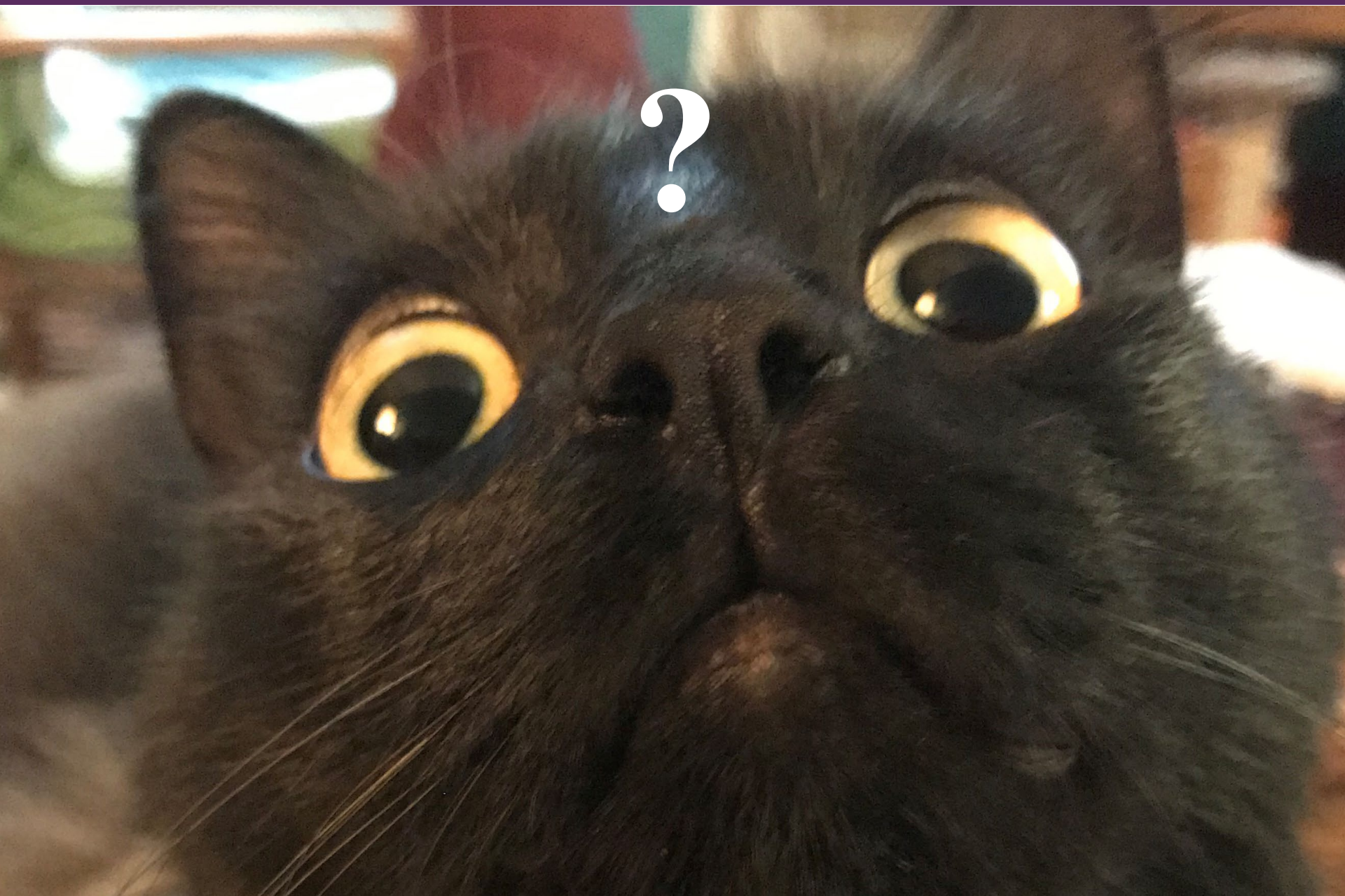
ALMA ANONYMIZATION



Alma Anonymization

Alma provides multiple layers of anonymization

- Transactional: Alma will remove PII from loans/requests when complete
 - CARLI staff will implement anonymization settings in each institution
 - Waiting on Ex Libris to ensure that AFN-related data are retained
 - Will likely be implemented **after** July 1. Watch for details.
- User: Alma will remove PII from user records when purged
 - CARLI staff will implement anonymization settings in each institution
 - Institutions planning purges sooner should request assistance
 - Possible good practice: Check these settings before running purges



Join us July 14
at 2pm for another
Office Hour session.

Contact CARLI at
support@carli.illinois.edu

