



*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  
JULY 14, 2022

USER MANAGEMENT:  
CREATING & UPDATING USER DATA

# Agenda – 7/14/2022

## Announcements and Reminders

### User Management: Creating & Updating User Data

- User Record Requirements
- SIS Sync Practices
  - Survey Results
  - Update frequency
  - Expiry and Purge Dates
- Common Desirable Practices

## I-Share Annual Statistics Package

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

FY2021-2022 Annual Statistics Package reports are being run and posted to your libraries' secure FTP folder.

- Collection stats were generated on July 1
- Circulation and AFN Stats 1-3 generated on July 2
- Request stats and unique titles stats will be generated July 15

If you're not familiar with CARLI's secure FTP server, see

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

- Files on secure FTP server are deleted after 60 days to conserve space

## Announcements/Reminders

### Upcoming Office Hours

- 2022 Office Hours have been scheduled – 2<sup>nd</sup> Thursday of each month, 2pm-3pm.
- Next session: August 11, 2022

### Let's Talk About Fulfillment

- Off for July
- New schedule for 2022-2023 coming soon

### Technical Services Q&A

- Off for July
- <https://go.illinois.edu/CARLItsqa> for past sessions
- Next session: August 11, 2022

# Announcements/Reminders

## Alma Electronic Resources

- Be sure to update your electronic collections in your Alma IZ for the current fiscal year subscriptions
  - Activate any new collections and subscriptions for patrons to get access
  - Deactivate and delete collections if you no longer subscribe

## Alma Acquisitions: Fiscal Period Rollover

- CARLI staff are available to consult on rollover tasks
- CARLI will create new fiscal years for non-Acq institutions

## 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: Creating & Updating User Data**





# USER RECORD REQUIREMENTS



## Required data for all records:

- Primary Identifier
- Last name
- Email address (must also be checked as Preferred)
- User Group
- Expiry Date
- Purge Date
- Address (must also be checked as Preferred)
  - Address line 1
  - Address state/province
  - Address postal code
  - City

## Preferred contacts support...

- AFN functionality
- Accurate letter creation
- AFN reporting
- Primo VE user detail display

Always select a preferred address, even if only one is present.

The screenshot displays the 'User Details' page with the following sections:

- Addresses:** Shows 2 items. Item 1 is selected as preferred (indicated by a triangle icon). Item 2 is also present but not preferred (indicated by a checkmark icon).
- Phone Numbers:** This section is currently empty.
- Email Addresses:** Shows 1 item, which is selected as preferred (indicated by a double-headed arrow icon).

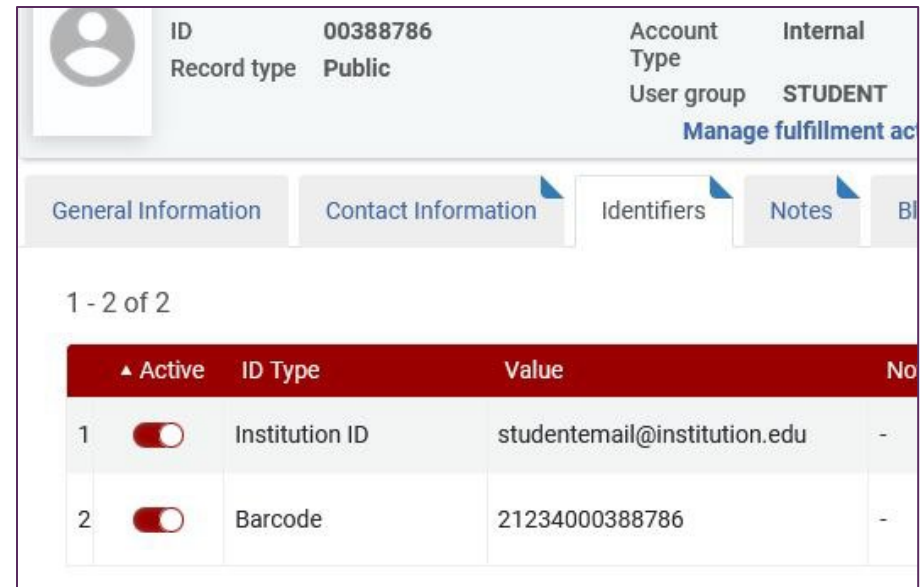
Addresses		
1 - 2 of 2		
	Preferred	Address
1	▲	123 Street Boulevard Springfield IL 60622-4824
2	✓	123 Street Boulevard Springfield IL 60622-4824

Email Addresses		
1 - 1 of 1		
	Preferred	Email Address
1	↕	email@anonamail.com

- User records support multiple identifiers for:
  - Login/username
    - If using single sign-on (e.g., OpenAthens, Microsoft Azure, etc.), user record must contain a matching identifier
  - Matching to student information system for updates
  - Find user for fulfillment (e.g., check-out, request)
- Possible identifiers
  - Institution ID (e.g., student ID number, employee ID, “Banner ID number”)
  - Barcode
  - Username or “Net ID” (must be provisioned by Ex Libris)
  - Email (if provisioned; separate from the email address)
- Choice of Primary Identifier
  - Should be a value that will not change over time
  - Commonly used as the SIS match point

- Identifiers must be unique
  - Across the institution
  - Ideally, across I-Share



Account details:

- ID: 00388786
- Record type: Public
- Account Type: Internal
- User group: STUDENT
- Manage fulfillment ac

Navigation tabs: General Information, Contact Information, Identifiers, Notes, Bl

1 - 2 of 2

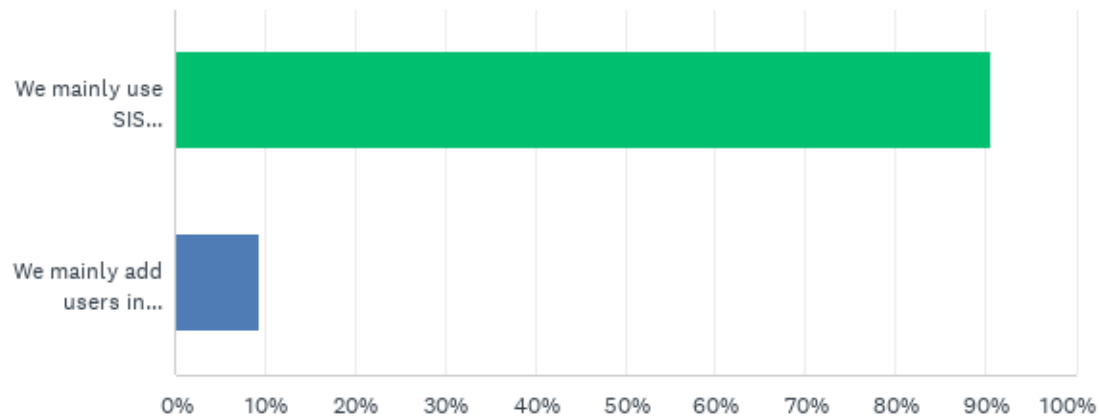
	Active	ID Type	Value	No
1	<input checked="" type="checkbox"/>	Institution ID	studentemail@institution.edu	-
2	<input checked="" type="checkbox"/>	Barcode	21234000388786	-

# **STUDENT INFORMATION SYSTEM SYNCHRONIZATION PRACTICES**



- CARLI ran the “Alma Institutional Student Information System (SIS) Practices” survey in June and July 2021
  - 55 responses representing 50 institutions
    - 4 incomplete surveys
  - Most libraries responding use SIS sync (48 of 53)
    - 3 institutions identifying manual entry only
    - 1 institution identified a SIS process that included extra steps

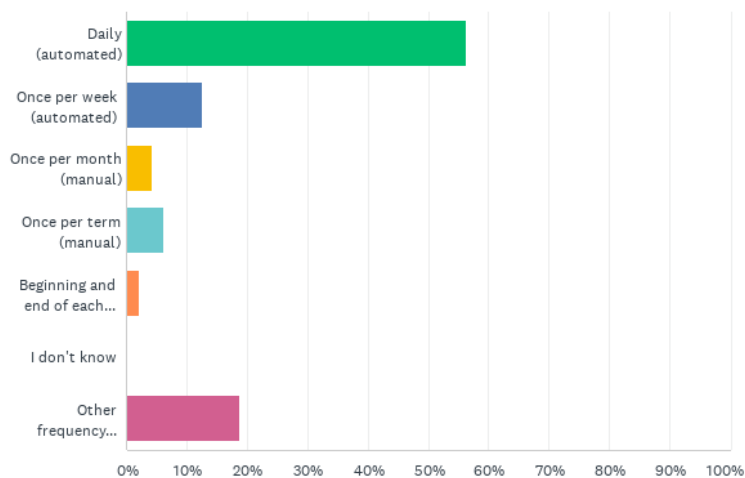
Q2 How does your institution create and update user records for the majority of your users?



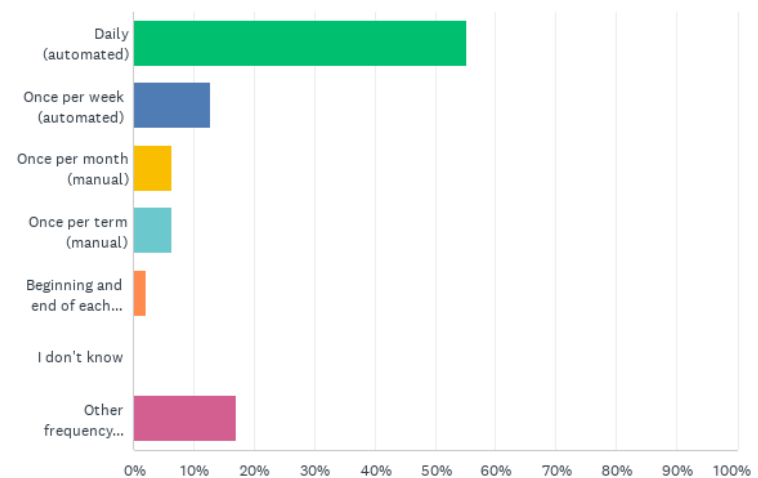
## SIS PRACTICES: FREQUENCY OF UPDATES

- Over half of institutions run daily SIS updates.
  - Both students and employees covered here
  - Two institutions are daily except for weekends
- Six institutions run once per week
- Seven institutions run monthly on semester basis

Q4 Identify how frequently you load SIS data for students.

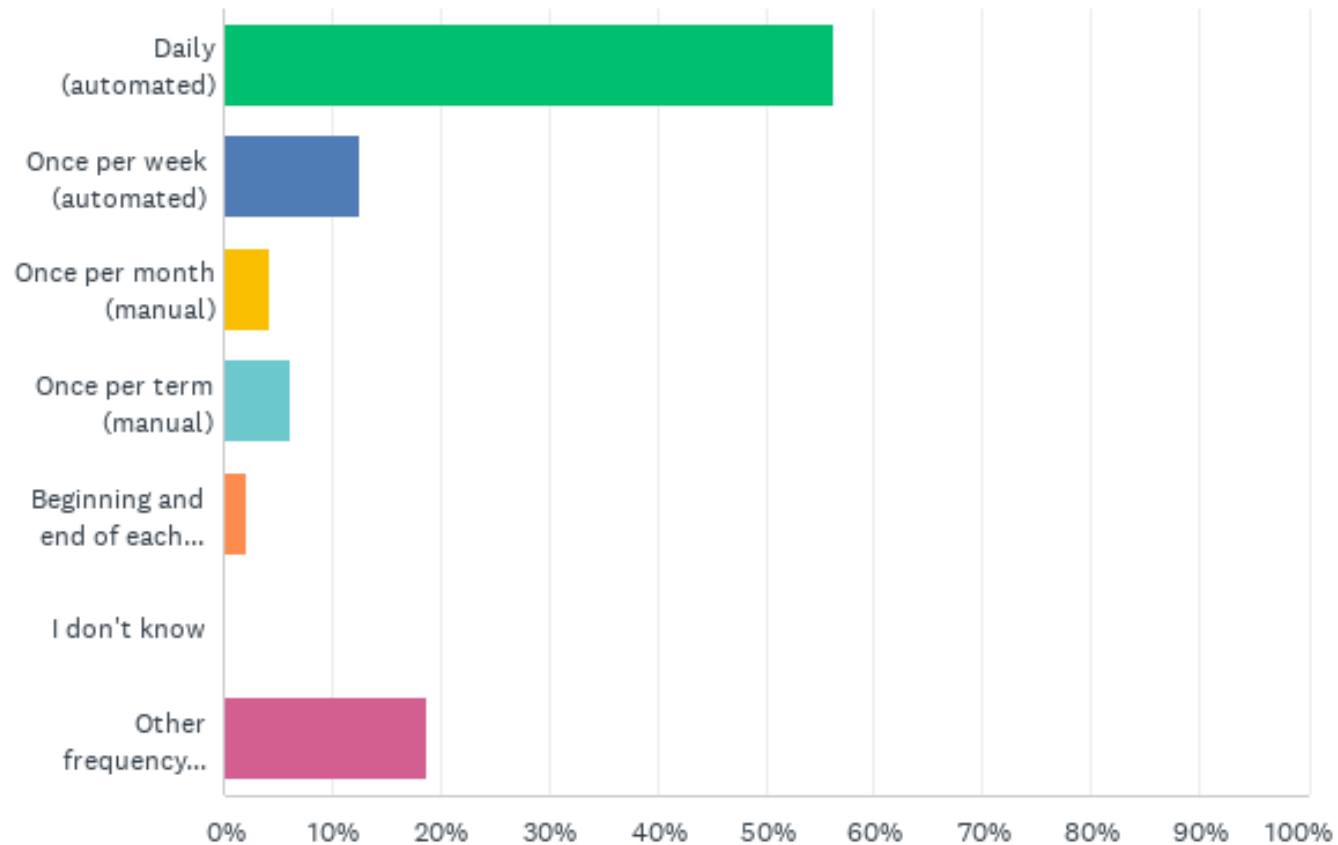


Q9 Identify how frequently you load SIS data for employees.

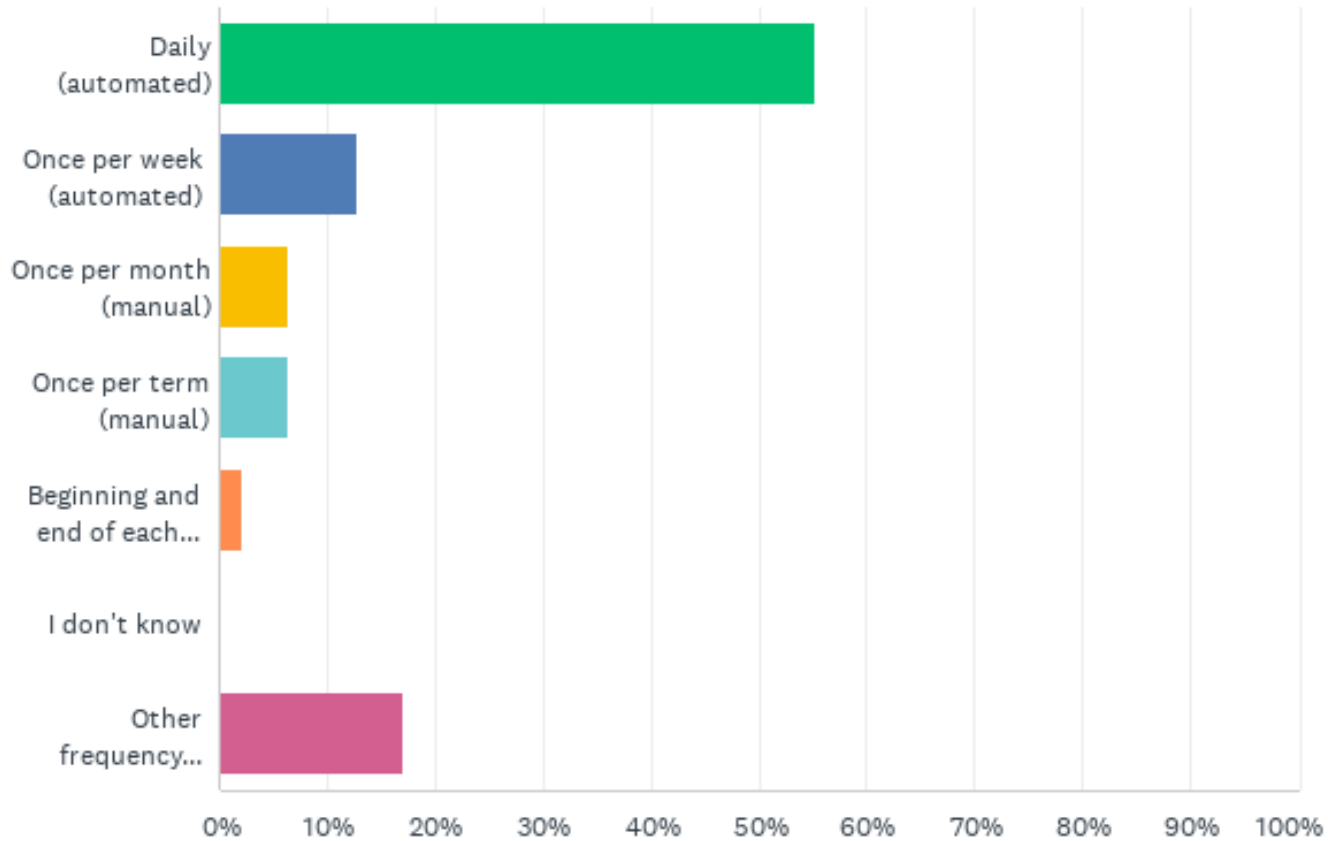




Q4 Identify how frequently you load SIS data for students.

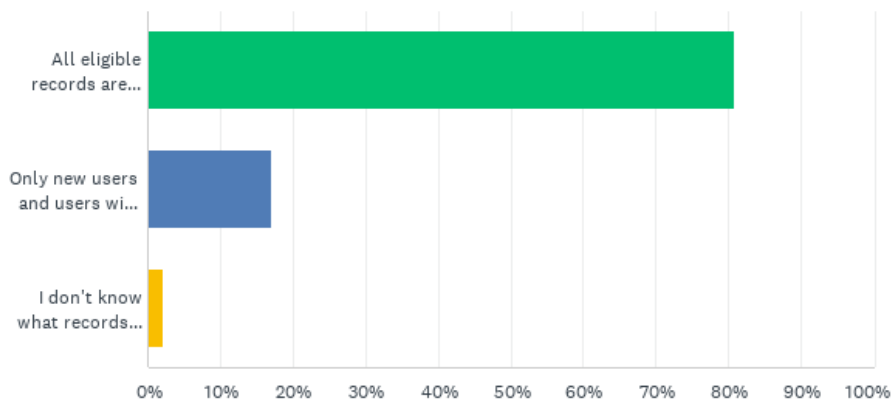


Q9 Identify how frequently you load SIS data for employees.

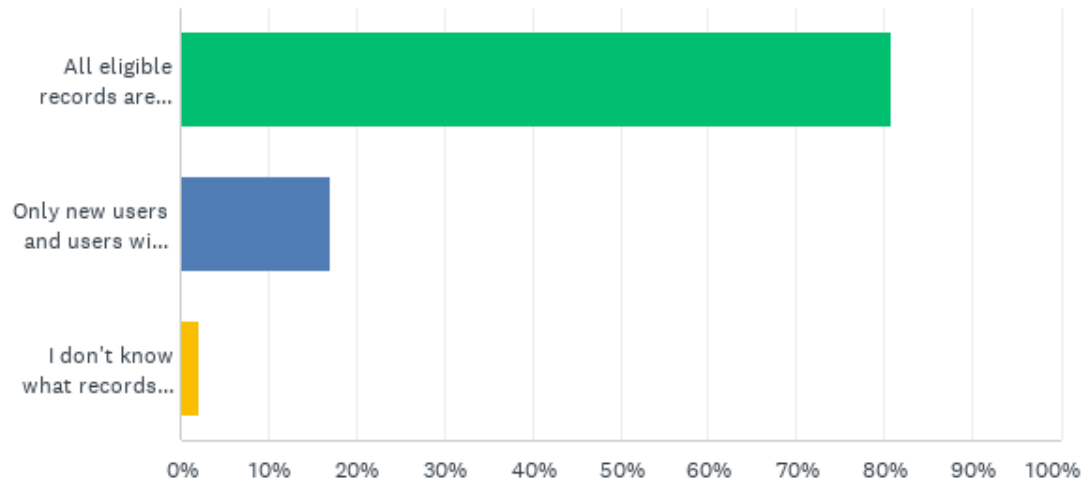


- Most institutions perform comprehensive loads
  - Sending all available records
  - Two institutions are daily except for weekends
- Fewer institutions running regular incremental loads
  - 8 load new students at frequency (5 for employees)
  - 1 institution supplements with monthly comprehensive loads

Q6 At the update frequency above, does your institution update all student records or supply only new and updated records?



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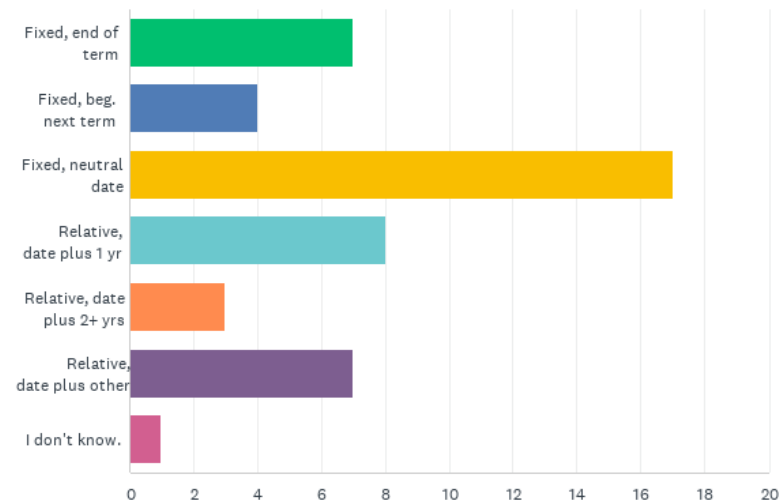


# Who wants a patron record to live forever?

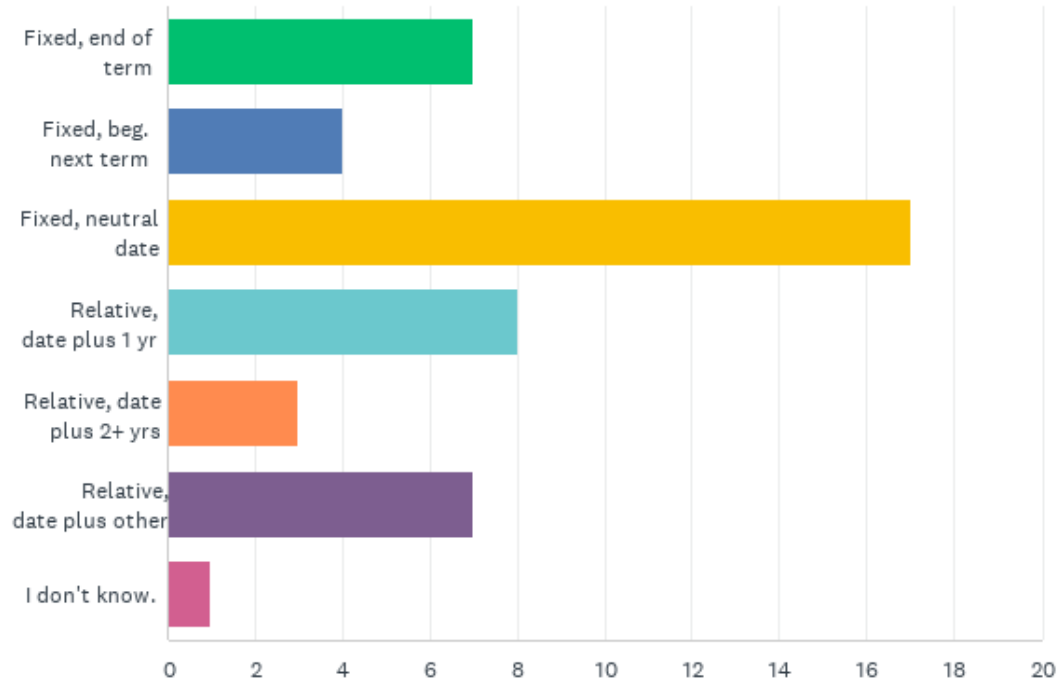
- Expiry Date
  - Used to authorize a user against a calendar.
  - Provide access to active patrons
    - Expired user cannot login
    - Cannot borrow or renew loans past expiry date
- Purge Date
  - Used to manage access to user data
  - Retain long enough to provide accountability
  - Set short enough to protect patron privacy

- Broad distribution of practices (n = 45)
  - 28 institutions choose a fixed date on the calendar
    - 17 choose a neutral date, e.g., 6/30 or 12/31
    - 11 choose a date on the academic calendar
  - 18 institutions set a date relative to the update
    - 3 set expiry multiple years in the future
    - 8 set expiry as the update day + 365 days

Q7 Identify the date interval(s) you apply for the user expiry date on student records.



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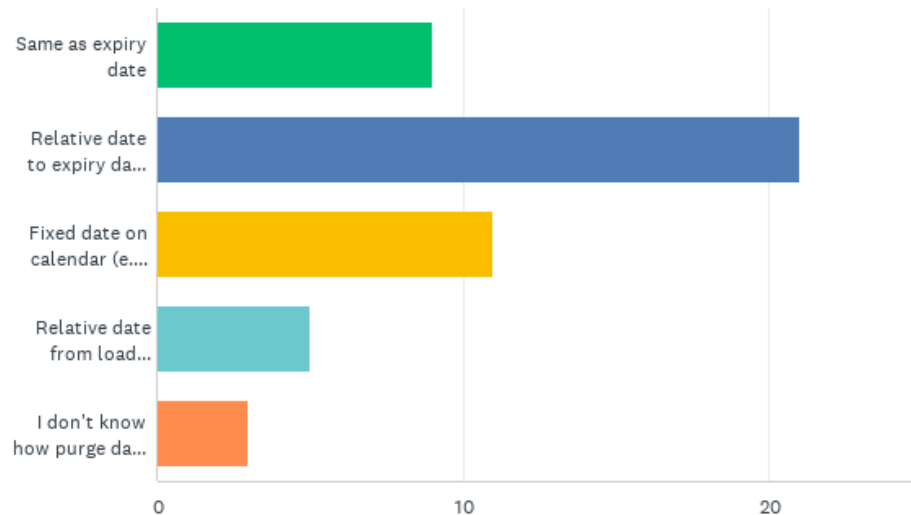


- 60 days from update
- 6 months from update
- 9 months from update
- End of term + 3 weeks
- End of term + 3 months grace period
- Update date + Longest Loan Period + 1 day
- End of the month following the end of the term
- Expected graduation date OR end of term date
  
- Employees' records more commonly a fixed future date
  - 5/31/2025
  - 1/1/2030
  - 7/31/2031

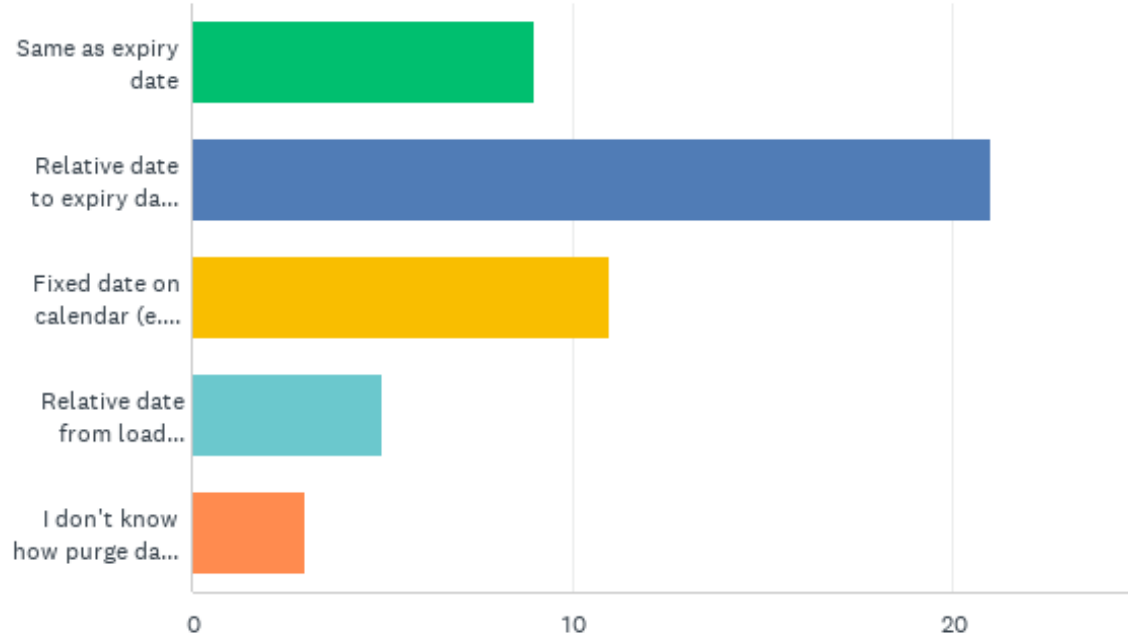


- Practices tied often to expiry and load choices (n = 48)
  - 26 institutions choose a date related to another date
    - 21 choose date relative to the expiry date (e.g., Expiry + 1 year)
    - 6 choose date relative to the update
  - 11 institutions choose a fixed calendar date
  - 9 institutions use the same expiry and purge date

Q8 Identify the date interval(s) you apply for the user purge date on student records.



Q8 Identify the date interval(s) you apply for the user purge date on student records.



- Most common: expiry date + one year
- 6 months from update
- 12 months from update
- 9/15 of the year after expiry
- Expiry + 2 years
- Graduating students get 3 months past graduation date; other students get 12 months past expiry (end of term)
- Employees' records more commonly a fixed future date
  - 1/1/2030
- Frequently, institutions using same criteria as students

# COMMON DESIRABLE PRACTICES FOR USER MANAGEMENT



Most institutions use SIS loads; All create users manually

- Collect only as much data as needed for operations
- Retain only for as long as needed for operations
  - Consider record retention policies at your institution
- Select reasonable dates
  - Frequency of updates
  - Services offered (e.g., loan periods, authentication)

Status	Active	Status date	06/21/2020
Birth date		Expiration date *	12/31/2099
Purge date *	12/31/2099	Last patron activity date	02/25/2021





**Join us August 11  
at 2pm for another  
Office Hour session.**

**Contact CARLI at  
[support@carli.illinois.edu](mailto:support@carli.illinois.edu)**

POS1008170080, Big bluestem; Plants of SIUE (Southern Illinois University Edwardsville)  
[https://collections.carli.illinois.edu/digital/collection/sie\\_plants/id/73/rec/11](https://collections.carli.illinois.edu/digital/collection/sie_plants/id/73/rec/11)