



# THE ROLE OF I-SHARE LIAISONS

September 14, 2022

- Why do we have I-Share Liaisons?
- Responsibilities of I-Share Liaisons
- Resources for I-Share Liaisons
- Q & A



## liaison

*Noun* li·ai·son lē'āzän

1. communication or cooperation that facilitates a close working relationship between people or organizations.
2. **a person who acts as a link to assist communication or cooperation between groups of people.**
3. the binding or thickening agent of a sauce, often based on egg yolks.

- In addition to the library Director/Dean, the I-Share liaison serves as the primary contact for communications to and from CARLI relating to your Alma instance and I-Share in general
- In some institutions, the library director serves as the I-Share liaison
- In other institutions, the director appoints someone on the staff to serve as liaison
- In any case, the library director is always allowed to perform any action that the liaison is expected to do

### The Liaison should:

- Be familiar with the functional areas and workflows at your library, as well as when to contact other related departments, such as IT
- Have a broad view of the library's operational duties
- Be familiar with Alma and Primo VE
- Handle communications effectively and quickly and be aware of what others need to know



- CARLI does not expect the I-Share liaison to make any fiscal decisions or contractual decisions or commitments for your institution. This is the director's role, or the director's designate.
- We don't expect the liaison to be an expert in all things Alma, it's more important to know who in your library does what with Alma. It can be helpful to be Alma and Primo VE Certified.
- Never be embarrassed to ask CARLI for help, there are no "dumb" questions.



- Announcing Alma or CARLI network downtime.
- Upcoming meetings, webinars, training
- Announcing new services
- Announcing I-Share member changes--libraries joining or leaving
- To discuss work that needs to be done in your Alma instance. For example: work with duplicate bib records, Fulfillment configuration changes, or an amnesty project for closed I-Share libraries.

- To report a change in their library staff to update the I-Share membership directory on the CARLI website
- For advice on big projects that would impact Alma temporarily or permanently : e.g., a library move or closure
- To request assistance on implementing a new product, e.g., a self-check station, beginning using Alma acquisitions or other modules, crafting a special report
- To ask questions about CARLI policies, products, projects



### Managing Communications

- Liaison is a facilitator, not a gatekeeper
- Encourage communication
- Encourage participation

### Maintaining Institutional Accountability

- Account and Data Management
- Regular and Routine Tasks



## Daily

- Check CARLI email list mail and redistribute as needed.

## Regularly

- [CARLI directory](#) updates
- Check latest CARLI news
  - Committee reports, too!
- Read the CARLI Newsletter for information that should be redistributed within your library.
- Depending on institutional workflows, contact CARLI Support.
  - [Problem reporting procedures](#)

Data security is already an academic library value!

- Family Educational Rights and Privacy Act
- Illinois Library Records Confidentiality Act
- Additional institutional requirements

Data has value in telling our stories, not just counts of stuff, but who or what kinds of patrons use stuff and services and when.

You need access to your data, and may need to maintain local copies of more granular data to perform analysis and report outcomes.



## V. Participant Responsibilities

5. Establish all necessary procedures and protocols to ensure the proper use, storage, and confidentiality of any I-Share data Participant retains on its own servers or for its own purposes beyond the day-to-day operation of the library management system of any data in Participant's control, include personally identifiable information of Participant's or other I-Share participant's patrons. With regard to this data, Participant shall comply with all of its institutional rules regarding data security, Institutional Review Board approval, as well as all other federal, state and local laws that apply to such data.

Participants will have access to their own library's I-Share data and to any data or statistics generated in the library management software that is related to their library's collection and patrons.

## Regularly

- Request/retrieve reports on Alma activity
  - [What's in my FTP directory?](#)
- Perform [calendar maintenance](#)
  - Alma Library Calendar, Acquisitions Fiscal Periods, etc.

## As Needed

- Contact CARLI with changes to personnel that may affect services, directory information, etc.
- CARLI directory updates



The liaison should organize institutional knowledge of:

- Login security
  - Files Server
  - XXX CARLI Box Folder
  - Alma User Manager
  - Alma Developer Network
- [Institutional Email Lists for Ex Libris Customer Support Center](#)
- SIS loads

## Resources available:

- Liaison's Guide
- CARLI Website
- Training
- Mailing Lists
  - CARLI
  - ELUNA (Alma-L, Primo-L)
- Ex Libris Knowledge Center
- Each Other
- CARLI Staff

CARLI Website <https://www.carli.illinois.edu/>

- System Status announcement
- CARLI calendar
- Documentation
- Contact information for fellow members
- Link to the I-Share catalog
- Liaison's Guide
- Much more

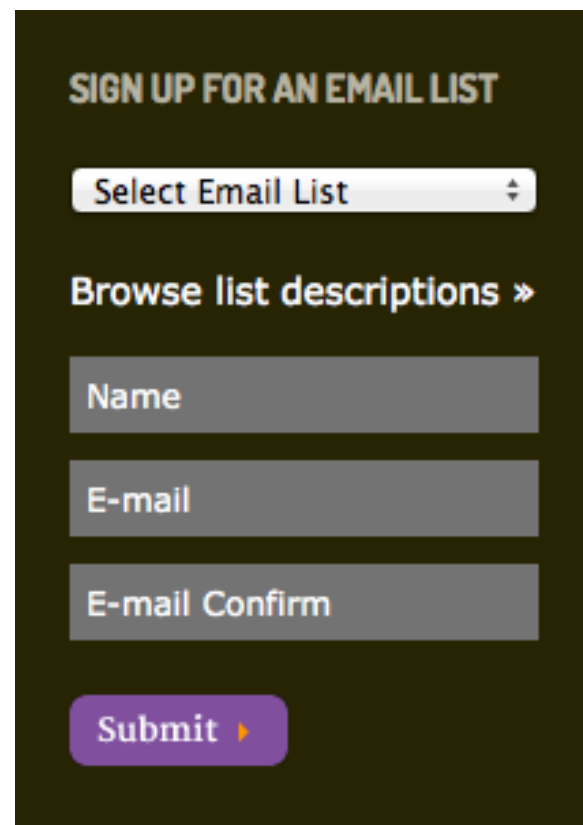


## Training

- [Ex Libris Alma Essentials Training](#)
- [CARLI Office Hours](#)
- Let's talk about Fulfillment (I mean Alma, not life's purpose), available on [CARLI Calendar](#)
- [CARLI Technical Services Q&A](#)
- [Ex Libris LibGuide](#)
- [Ex Libris Alma Certification Training](#)

## Announcement Email Lists

- **i-shareliaisons@carli.illinois.edu:** Announcements sent to Liaisons
- **i-share@carli.illinois.edu:** Broadcast announcements to the I-Share community
- **announce@carli.illinois.edu:** Broadcast announcements to the CARLI community



The image shows a dark-themed sign-up form titled "SIGN UP FOR AN EMAIL LIST". At the top, there is a dropdown menu labeled "Select Email List" with a small arrow icon. Below this is a link that says "Browse list descriptions »". The form contains three input fields: "Name", "E-mail", and "E-mail Confirm". At the bottom of the form is a purple "Submit" button with a small arrow icon.

### Interest group (Discussion) Email Lists

- **ResShare-ig@carli.illinois.edu**: News and discussions of interest to access services staff
- **PubServ-ig@carli.illinois.edu**: News and discussions of interest to public services staff
- **Rpt-ig@carli.illinois.edu**: News and discussion of interest about Analytics
- **TechServ-ig@carli.illinois.edu**: News and discussions of interest to technical services staff
- **E-Resource\_Contacts@carli.illinois.edu**: News and discussions of interest to e-resources staff
- **PVE-ig@carli.illinois.edu**: News and discussions of interest to staff customizing Primo VE

## Ex Libris Knowledge Center

- Ex Libris has open access to their Knowledge Center:  
<http://knowledge.exlibrisgroup.com/>
  - Documentation
  - Frequently asked questions



### Each Other

- Similar institutions
  - Membership listing
- Topical CARLI email lists
- Alma-L and Primo email list from ELUNA



## CARLI Staff

- [support@carli.illinois.edu](mailto:support@carli.illinois.edu)

Questions?

