I-SHARE ALMA PRIMO VE OFFICE HOURS WILL START SHORTLY



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 AND PRIMO VE OFFICE HOURS FEBRUARY 11, 2021

Agenda - 2/11/2021

CARLI Updates

Issue Reporting in Alma

• Q&A

- Feb. 12: Let's Talk About Fulfillment
- Feb. 19: <u>CARLI Resource Sharing in our New Age:</u> <u>Material Handling During COVID</u>
- Feb. 23: Let's Talk About Fulfillment
- Feb. 24: CANCELED Tech Services Q&A
- Sign up for the new <u>Technical Services Meetings</u> with <u>CARLI Staff</u>
- Thursdays through April 15 from 11:15-noon: <u>CARLI</u>
 <u>Discussion sessions</u> after the <u>Ex Libris Primo VE-</u>
 <u>Become an Expert webinars</u>

- CARLI established the Alma Primo Contacts email list to have a designated Alma migration project contact at each I-Share library; now that the migration is done, we are going to retire the Alma Primo Contacts email list.
- We are going to return to using the I-Share email list for CARLI staff announcements about I-Share related news and events.
- Please make sure you are subscribed to the I-Share list, go to: https://carli.illinois.edu/mailman/listinfo/i-share
- Anyone can subscribe to the I-Share list; only CARLI office staff will post to it.
- Please continue to use the CARLI interest group (IG)
 lists for email discussions with other I-Share library staff







In most situations, please contact CARLI first at support@carli.illinois.edu for problems and questions about Alma and Primo VE

- We know our unique I-Share consortial environment and configurations better than general Ex Libris Support.
- It helps CARLI staff identify problems across I-Share institutions.
- If needed, CARLI staff will open a Case with Ex Libris and copy you so that you can participate in correspondence on the Case.
- Email to our support@carli.illinois.edu address is always better than a direct email to one staff member.







Reporting Issues with Collections and Portfolios

 If the Collection / Portfolio is active in your Institution Zone (IZ) via the Network Zone (NZ):

Report to CARLI via support@carli.illinois.edu. CARLI will follow up with any adjustments needed for access, and report the problem on behalf of I-Share to Ex Libris.

Example:

| DOAJ Directory of Open Access Journals (Free internet resource, activated by CARLI) Available from 2015. | Ø |
|---|---|
| Nature Publishing (Free internet resource, activated by CARLI) Available from 2010 volume: 1 issue: 1. | Ø |





Reporting Issues with Collections and Portfolios

 If the Collection / Portfolio is active in your IZ via the Community Zone (CZ):

Report directly to Ex Libris using the "Report to Ex Libris" functionality we'll be describing today.

Example:

Full text availability

American Medical Association Journals

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Available from 01/07/1998.



"Report to Ex Libris" Functionality

- Requires a Salesforce Account with Ex Libris
- Requires CRM Contacts list to be set up in Configuration
 Configuration Menu > General > General Configuration >
 CRM Contacts

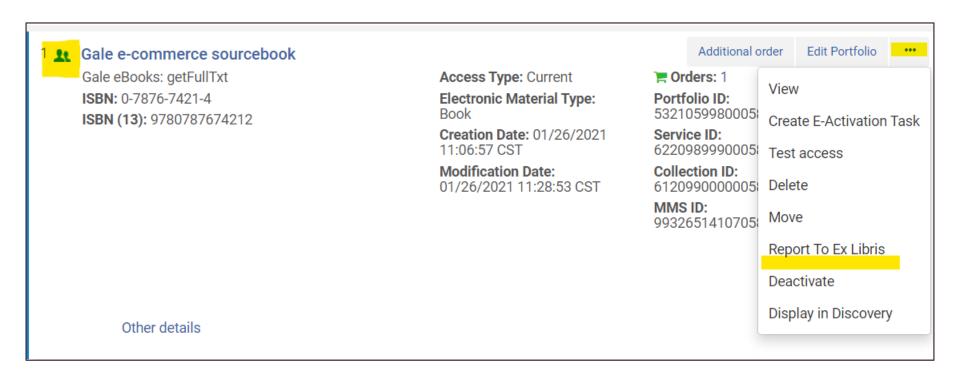
| ping Table | Customize | CRM Si Contacts |
|------------------------|--------------------|---|
| | Import ♣ Add Row ► | Table Description |
| No records were found. | Name | CRM Contacts Managed in Network No |
| | Salesforce ID | Customization mode: Entire table needs to be customized |
| | Customer Center ID | • |
| | e-mail | |
| | Add Row | |







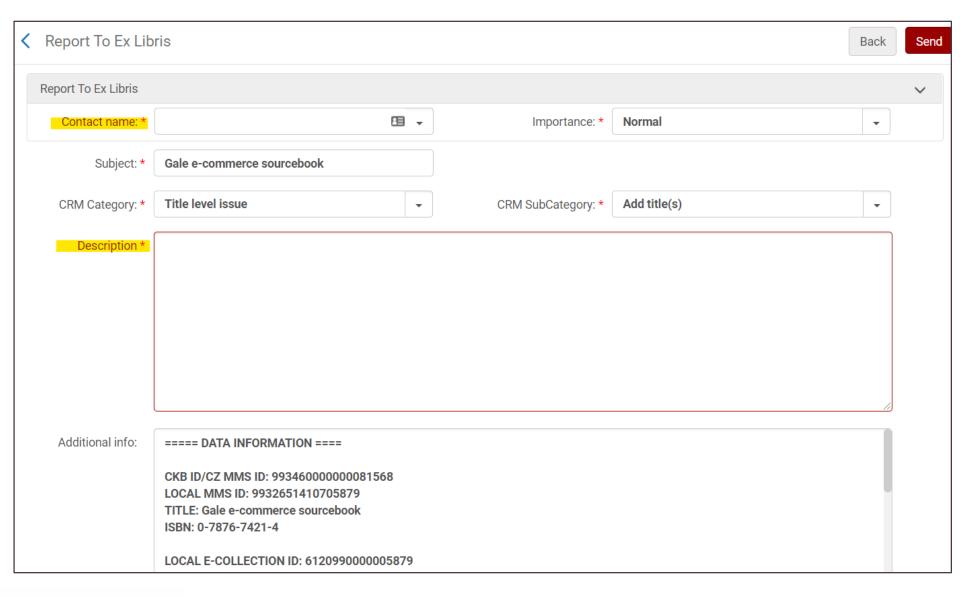
- Find the collection or portfolio with a problem
- Click "More Actions" (...)
- Select "Report to Ex Libris"







USING THE REPORT TO EX LIBRIS FUNCTION







Live Demo



More Information

Alma CRM

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/100Configuring_CRM_Contacts

 See section "Editing a Portfolio Using the Electronic Portfolio Editor" subsection "Coverage":

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/010Managing_Electronic_Resources#Coverage_tab



Thank you!

The next Open Office Hours will be on February 25th

