



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

I-SHARE ALMA/PRIMO VE OFFICE HOURS

AUGUST 26, 2021

Agenda – 8/26/2021

- Announcements
- Reminders and upcoming Alma/Primo VE events and learning opportunities
 - See <https://www.carli.illinois.edu/calendar> for CARLI events
- Today's Topic:
 - Reducing and managing our Alma Named Users

Announcements/Reminders

Upcoming Office Hours

- Moving to once a month for the remainder of 2021
- September 9, October 14, November 18, December 16
- always at 2:00pm

Technical Services Q&A Sessions

- On hiatus during Ex Libris Implementing Acquisitions series.
- Returning in September!

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

- Watch for an announcement about the scheduling of future sessions and registration information!
- Notes are posted on the CARLI calendar event for past sessions.

ELUNA Learns 2021

<https://el-una.org/meetings/eluna-learns-2021/>

- ELUNA is presenting a series of webinars related to Ex Libris products in the summer and fall of 2021.
- Sessions will be presented live and recorded.
- ELUNA charges \$25 per participant, but CARLI has purchased a block of registrations for I-Share library staff to register for free on a first come, first serve basis while our supplies last. You must register through CARLI, not the ELUNA website.
- To register, [complete this registration form](#) (one form per person) and send it to support@carli.illinois.edu
- Note: ELUNA's policy is that these registrations are for one individual only and are not for group use.

Webinar Recordings

- Most past Ex Libris Webinars can be viewed [On Demand](#)
 - Implementing Acquisitions, Knowledge Days, Primo VE: Become an Expert, and many more standalone topics!
- Most CARLI webinars and Discussions after Ex Libris webinars are recorded and available from our website:
 - These [Office Hours](#)
 - [Implementing Acquisitions](#) Discussions
 - [Knowledge Days](#) Discussions
 - [Primo VE: Become an Expert](#) Discussions

I-Share Annual Statistics Package

- Download these data before the end of August!
- For a full description of the annual statistical package, see <https://www.carli.illinois.edu/products-services/i-share/stats/almastatpck> and/or watch the recording of the [July 22, 2021 Open Office Hours](#)

I-Share Union View

I-Share Union View URL:

https://i-share-network.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_NETWORK:IShare_UNION

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

I-Share Liaisons and Directors received email with information on authentication configuration needed for the Union View for your institution. Contact support@carli.illinois.edu with questions.

Premium Sandboxes Refreshed

- Refresh occurred on August 8 as part of Alma monthly release update
- Six sandboxes are ready for use as of August 19.
- [Alma Sandbox Information](#) includes URLs and best practices.
- Sandbox credentials found in your library's Box folder.
 - Check the "XXX Credentials" subfolder.
 - "Alma Primo VE Sandbox Information for CARLI Libraries August 2021.docx"

bX Article Recommender

- The bX Recommender service is now available to I-Share institutions.
- See [CARLI's bX Recommender FAQ](#)
- I-Share Liaisons and Directors can request a bX Token by emailing support@carli.illinois.edu

ARTICLE

The Biology and Ecology of Cat Fleas and Advancements in Their Pest Management: A Review

Rust, Michael K
Insects (Basel, Switzerland), 2017-10-27, Vol.8 (4), p.118

🔍 *The cat flea (Bouché) is the most important ectoparasite of domestic cats and dogs worldwide...*

📄 PEER REVIEWED 📄 OPEN ACCESS

🔗 Available Online >

Send to

EXPORT RIS EASYBIB REFWORKS PRINT EMAIL CITATION PERMALINK

View Online

Full text availability

ProQuest Central Available from 01/01/2010.	🔗
DOAJ Directory of Open Access Journals (Free internet resource, activated by CARLI)	🔗
EBSCOhost Academic Search Complete Available from 12/01/2011	🔗

Related reading
recommended items that are related to the record

Guideline for veterinary practitioners on canine ehrlichiosis and Angel Sainz
Parasites & Vectors.2015, Vol. 8(1), p. 75-20
ARTICLE suggested by bX

Recent Developments in Ectoparasitocides
M A Taylor
The veterinary journal.2001, Vol. 161(3), p. 253-268
ARTICLE suggested by bX

The biology, ecology, and management of the cat flea.
M K Rust
Annual review of entomology.1997, Vol. 42(1), p. 451-73
ARTICLE suggested by bX

Responses of artificially reared cat fleas Ctenocephalides felis felis
T Kernif

I-Share libraries need to reduce our total number of active Alma Named Users

- Ex Libris' Alma pricing is based on
 - Bibliographic title count
 - E-journal count
 - Alma “Named Users”
- “Named Users” are **active** user records in Alma that have been assigned any role that **can log into Alma**.
- This includes Alma logins with all roles **except** Patron, Instructor, and/or Trial Participant

- CARLI's **consortial** Alma contract allows for
 - 2162 active Alma Named Users
 - We currently have 4322 active Named Users
 - We need to reduce this number and stay at or under 2162
- There are not specific named user limits for each I-Share library
 - Our contract is for the consortium as a whole,
 - Ex Libris provides neither the price nor the pricing metrics library by library

- Collectively, all I-Share libraries and the CARLI staff are allowed 2162 active Alma Named Users
- There are not specific limits for each I-Share institution
- Each I-Share institution should have as many active Named Users as they require to operate securely, but should have no more active than they need.
- CARLI staff believe that 2162 Named Users is more than adequate for our current I-Share members, and that there are many Named Users that are unused and which can be deactivated

- Staff Login Report
 - Located in Alma Configuration > General > General Configuration > Staff Login Report
 - Lists all “active” Named Users
 - Shows the last login date in the past 90 days
 - Shows a dash if the user has not logged on in 90+ days
- Analytics Reports written by CARLI
 - Found under Shared Folders > Carli NETWORK 01CARLI_NETWORK > User Reports
 - Named Users List with Roles
 - Lists each user with a staff role, but does not list the roles
 - Named Users List with Roles
 - Lists each user with a staff role and the roles that are assigned
 - Named User Analysis Role Counts

HOW CAN WE FIND OUT HOW MANY NAMED USERS WE ARE USING?

ExLibris

Configuring: University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL ▾

- Alma
- Acquisitions
- Resources
- Discovery
- Fulfillment
- User Management
- General
- Analytics

Libraries
Add a Library or Edit Library Information
Relationships
Define Campuses

Locations
Remote Storage

Work Orders and Departments
Work Order Types
Work Order Departments

External Systems
Integration Profiles
Integration XSL Converters
S/FTP definitions
Manage Encryption Keys

User Interface Settings
Alma Logo and Color Scheme
Social Login Labels
Identity Service Labels

General Configuration
Other Settings
Institution Languages
Country Names
Home page Notifications
CRM Contacts
Staff Login Report
Institution Notifications
Validate ILS Migration Form
Data Sharing Profile
DARA Recommendations
Cloud Apps Configuration

Letters
Letters Configuration
Components Configuration

Widgets
Customized Widgets
Primo Widget Search Fields
Primo Widget Search Precision

Network Groups
Fulfillment Member
Institutions Relations

Security
IP Group Configuration
Login Restriction Configuration
Redirection Allowed List

Staff Login Report

	▲ User Name	↕ Last Login
1		-
2		-
3		-
4		-
5		-
6		-
7		08/19/2021
8		07/30/2021
9		08/19/2021
10		08/18/2021
11	acqtest	08/18/2021
12		08/19/2021
13		-
14		-
15		-
16	admin	08/20/2021
17	admin-integration-profiles@alma	08/17/2021

HOW CAN WE FIND OUT HOW MANY NAMED USERS WE ARE USING?

The screenshot displays the Alma Catalog interface. At the top, a blue navigation bar contains the 'Catalog' logo and menu items: Home, Catalog, Favorites, Dashboards, Create, and Open. Below this is a toolbar with various icons for file management and a location path: /Shared Folders/Carli NETWORK 01CARLI_NETWORK/User f. A 'Show Hidden Items' checkbox is also present.

On the left side, a 'Folders' pane shows a tree view under 'Shared Folders'. The 'Carli NETWORK 01CARLI_NETWORK' folder is expanded, revealing sub-folders such as 'Alma', 'Subject Area Content', 'CARLI Drafts', 'Dashboards', 'I-Share Statistics Pac', 'Institution-Specific Ne', 'Item Maintenance Re', 'Prompts', 'Reports', 'Reports that need to', and 'User Reports'.

The main content area on the right shows a list of reports. The filters are set to 'Type All' and 'Sort Name A-Z'. The reports listed are:

- Named Users Analysis Role Counts** | Last Modified 8/20/2021 2:30:07 PM | Owner HE_6415619580005816_5816_D_na06.alma.exlibrisgroup.com | Open Edit More
- Named Users List** | Last Modified 8/20/2021 6:16:22 PM | Owner HE_6415619580005816_5816_D_na06.alma.exlibrisgroup.com | Open Edit More
- Named Users List with Roles** | Last Modified 8/20/2021 2:27:38 PM | Owner HE_6415619580005816_5816_D_na06.alma.exlibrisgroup.com | Open Edit More
- Users Eligible for Purge** | Last Modified 8/20/2021 7:24:52 PM | Owner HE_6415619580005816_5816_D_na06.alma.exlibrisgroup.com | This report lists your institution's users who have purge dates in the past. | Open Edit More

- User accounts that have never been used, or not used in a long time
- “Test” accounts set up to try something infrequently
 - Consider using an Alma sandbox instead
 - Deactivate test users when not being used
 - testAlma_XXX or prodAlma_XXX accounts from migration
- Any accounts for staff that are no longer employed by your library
 - If they still have borrowing privileges at your institution, their user record can remain active with only the Patron role but no Alma staff roles

- Do not touch user accounts that begin with **exl_** .
These are Ex Libris staff accounts.
- Do not deactivate any accounts that begin with **carli_**.
These are CARLI staff accounts that CARLI staff will manage centrally.
- Do not deactivate any accounts with primary ID **admin** or name of “Alma Administrator.” This is the “super user” account for your institution.

- When possible, consider using a shared, “generic”, user among some staff such as student workers
 - A circ desk computer typically staffed by student workers could use a login such as “circdesk1”
 - Multiple service points could use logins in a series such as “circdesk1”, “circdesk2”, etc.
 - These should be low privilege accounts
 - While Alma will allow it, you should not login from the same account more than once at a time
- [New best practice for generic accounts](#)
 - Note: We recognize this is a change from our recommendation during implementation that each staff member have a unique personal Alma login

carli.illinois.edu/products-services/i-share/user-management

- Identifying Named Users
- Deactivating a Named User
- Alma “Role Toggler” Cloud App
 - See also https://youtu.be/3D_fARn8CUo, “Cloud Apps in Alma”
- Setting up a Generic Named User

- CARLI would like to have our Named User count back under 2162 by the end of 2021
- Please complete your review and deactivation of unneeded accounts by December 1, 2021
 - Sooner is better!
- Each institution should do this review at least once a year

Questions?



**Join us September 9, 2021
at 2pm for another
Office Hour.**

**Contact CARLI at
support@carli.illinois.edu**

