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.

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I-SHARE ALMA/PRIMO VE OFFICE HOURS

OCTOBER 14, 2021

Agenda – 10/14/2021

- Announcements

- Reminders and upcoming Alma/Primo VE events and learning opportunities
  - See https://www.carli.illinois.edu/calendar for CARLI events

- Today's Topic:
  - Update on Named User Count
  - Comprehensive Update on Title Reduction Count

Announcements/Reminders

Upcoming Office Hours
- Moved to once a month for the remainder of 2021
- Remaining 2021 dates: November 18, December 16
- always at 2:00pm

Technical Services Q&A Sessions
- Scheduled for once a month from 10:30am-12:00pm
- Upcoming Dates: October 28, November 18, January 27, February 24, March 24, April 28, and May 26
- Registration open and available on the CARLI Calendar

Let's Talk about Fulfillment (I mean Alma, not life's purpose)
- Sessions are scheduled for every other week, alternating between Tuesday mornings at 10:30am and Friday afternoons at 2pm.
- Registration open and available on the CARLI Calendar

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

- Named Users Count as of October 12: 3,584
  - Includes 534 new, temporary users for IHLS CMC staff; without those: total is 3,050 - down from 3,117 on Sept. 9
  - "CARLI_" staff users have been deactivated by CARLI,
    - CARLI has started using one generic user in each IZ.
  - Several institutions have created shared circ users
- Names User Count goal in our contract: 2,162
- Libraries/CARLI should target test accounts
- Deadline to review your Named Users is December 1
- CARLI's Named User Documentation:

https://www.carli.illinois.edu/products-services/i-share/user-management/nameduserFAQ

I-Share libraries need to reduce our total number of Bibliographic Titles

- Ex Libris' Alma pricing is based on
  - Bibliographic title count
  - E-journal count
  - Alma "Named Users"
- "Bibliographic Titles" includes:
  - Bibliographic records in an institution zone
  - Bibliographic records in the network zone
  - Authority records in either IZ or NZ
- This count is reduced by the number of records that represent electronic journals

- CARLI's *consortial* Alma contract allows for
    - 46,420,000 active Bibliographic Titles
    - We currently have more (counts changing daily)
    - We need to reduce this number and provide room for growth.
- There are not specific title 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

- Reducing duplication engages efficiencies to managing and sharing resources
  - Whenever possible, share electronic collection data once for all members.
  - Deduplicating bibs improves imports and syncs with OCLC
  - Fewer records = cleaner catalogs
- This is the work we should be doing at this stage of our Alma implementation.

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- Goals:
  - Manage Electronic Resource Collections in the Network Zone when possible
  - Delete bib records with no Inventory
  - Eliminate duplicate bib records
- CARLI Alma Title Count Reduction Project Page: https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/project-overview
  - Contains a project overview
  - List of the different phases of record cleanup
    - Links to sub-project pages with more information on each
  - Links to all project announcements and communications
  - An FAQ

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- Open Access/Free Collections should be active only in Network Zone

- NZ is designed to manage these collections centrally to benefit all consortial members. Optimizes record and data sharing.

- Sub-Project page: https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/open-access-e-collections

- Work is almost complete! Collectively, we have already deleted over 850,000 titles!

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- E-Collections funded by CARLI are being handled in separate phases for NZ management as described in <u>our communications</u>. Future phases coming soon.
    - First round Sub-Project page: <u>https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/CARLI-funded-e-collections-nonEBSCO</u>
- First phase of CARLI fully funded e-colls includes:
    - Harper's Weekly, 1857-1912
    - Historical Statistics of the United States (from Cambridge University Press)
    - Sage E-Journal 2007 Deep Backfile
- I-Share institutions that elected to delete the duplicate e-collections should complete this work by October 15.
- CARLI staff work is in progress to delete these e-collections for institutions that requested it.
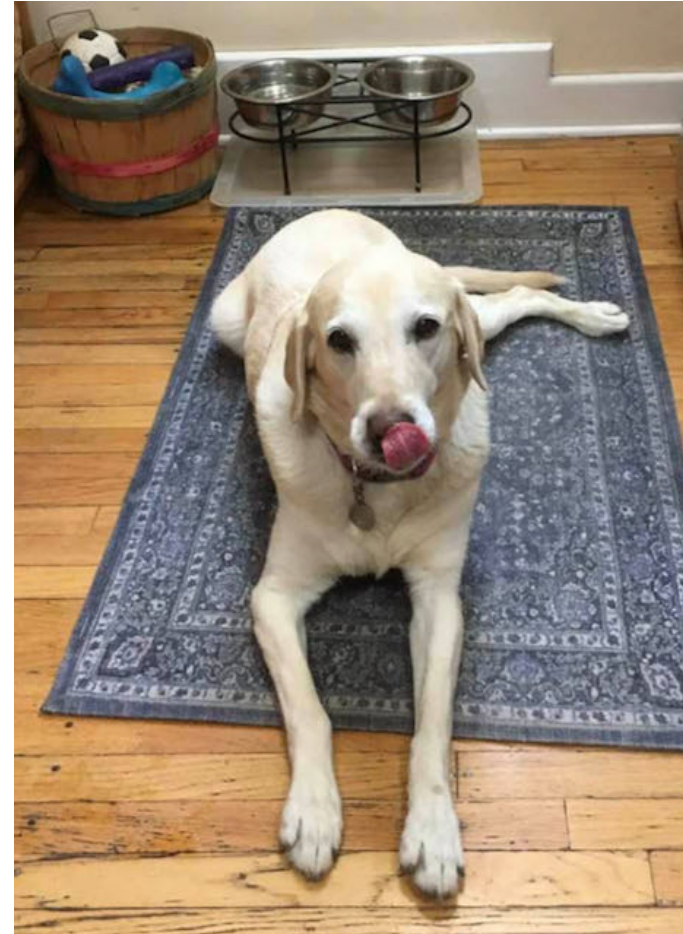
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- Next phase: Remove Bibs with no Inventory (IZ and NZ)
- Announcement to Liaisons/Directors, reports of each IZ's records, and documentation will be posted soon.
- Numbers of bibs with no inventory in IZs varies from under 10 to over 300,000.
  - These reports exclude Bibs that are part of boundwith relationships
- Timeline:
  - By October 15 - Reports and documentation is shared
  - By October 22 - Let CARLI know if you will do the work in your IZ or would you like CARLI to do the work
  - By November 24 - Institutions must complete the work in their IZs

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- Consultation Meetings are designed to discuss questions or concerns about your institution's data in relation to the title reduction project.

- If you are concerned about being able to accomplish the work, remember we have contracted with IHLS staff to help us with this project.

- Work will start as announced, even if your meeting is scheduled after the start date.

- More general questions about workflows or issues should be directed to support@carli.Illinois.edu

Time for more "Lab Reports"!

- Do you have a workflow or process in Alma you think others could benefit from?
- Have you set up a process in Alma that has made your co-workers say "WOW!"?

Consider submitting a proposal to present at our November 18 Office Hours and share with your I-Share colleagues. Email your proposal to support@carli.Illinois.edu.

Questions?

Join us November 18, 2021 at 2pm for another

Office Hour.

Contact CARLI at

support@carli.Illinois.edu