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

NOVEMBER 18, 2021

Agenda – 11/18/2021

- Announcements

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

- Named User Count and Title Reduction Project Updates

- Today's Topic: Related Records in Alma

- Open Q&A

Announcements/Reminders

Upcoming Office Hours
- December 16 @ 2:00pm– another round of Lab Reports

Technical Services Q&A Sessions
- Scheduled for once a month from 10:30am-12:00pm
- Upcoming Dates: 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

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 December 16 Office Hours and share with your I-Share colleagues. Email your proposal to support@carli.Illinois.edu by Dec. 6.

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ELUNA Learns 2021
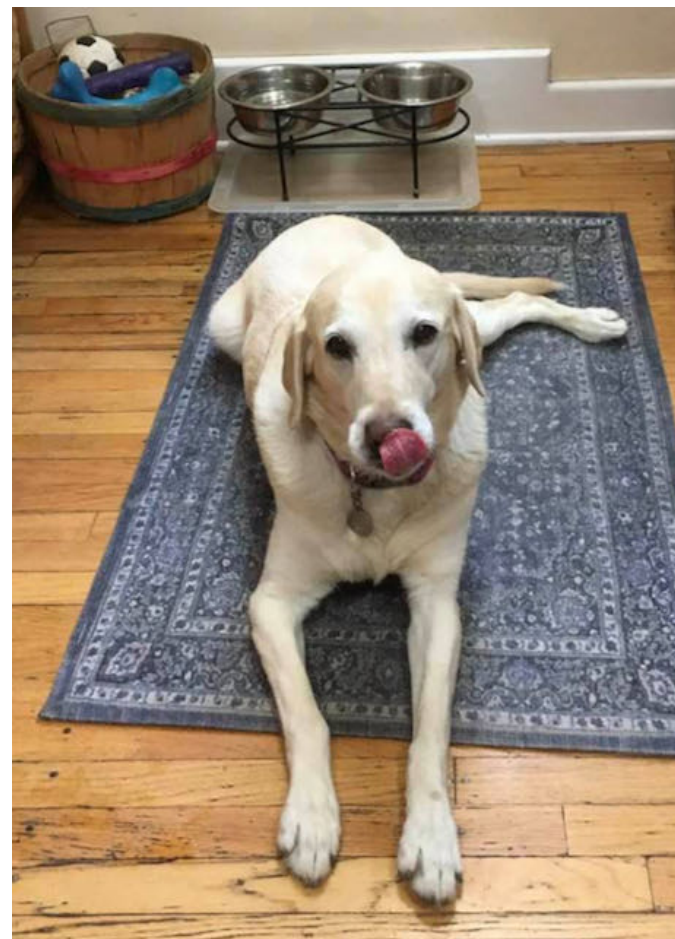
https://el-una.org/meetings/eluna-learns-2021/

- 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 <u>On Demand</u>
  - 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 <u>Office Hours</u>
  - <u>Implementing Acquisitions</u> Discussions
  - <u>Knowledge Days</u> Discussions
  - <u>Primo VE: Become an Expert</u> Discussions

- Named Users Count as of November 18: 3,562
  - Includes 644, temporary users for IHLS CMC staff;
    - without those: total is 2,918
  - Several institutions making changes after Fall Semester
    - Expecting another decrease of 75-80 users; maybe more?
  - More institutions have created shared users
- Names User Count goal in our contract: 2,162
- Target test accounts (15), users that login infrequently
- 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

Alma Title Count Reduction Project

- 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

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

- NZ enables sharing to all consortial members

  - Optimizes record, data sharing, and data correction

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

- Work is complete in all IZs!

- What about new stuff?

  - CARLI Collection Management Committee discusses collections for inclusion at NZ. Guidelines: https://www.carli.illinois.edu/products-services/collections-management/OA_eBooks

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E-Collections fully or partially funded by CARLI are being handled in separate phases for NZ management:

- First round of CARLI fully funded e-colls is complete:
  - Harper's Weekly, 1857-1912
  - Historical Statistics of the United States (from Cambridge University Press)
  - Sage E-Journal 2007 Deep Backfile
- Second round—removing E-Collections no longer funded by CARLI that were not continued by libraries— is in progress
  - Black Thought and Culture
  - Women and Social Movements in the United States, 1600-200
- Next round: Alexander Street Press e-collections

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Removing Bibs with no Inventory from IZs

- Announcement to Liaisons/Directors, reports of each IZ's records, and documentation has been posted.

  - These reports exclude Bibs that are part of boundwith relationships

- Institutions that elected to complete the work on their own should do so by November 24.

Removing Bibs with no Inventory from the NZ

- IHLS Alma Cleanup Team began deleting records on Oct. 14

As of November 16:

- E-Resource bibs deleted: 2,161,417

- Total bibs deleted: 4,278,348
    - Includes bibs with no inventory (IZ & NZ) and e-collections

- Consortial title count: 71,725,481
    - Target is 46,420,000

Bibliographic Title Counts (excluding EJournals)

	2020-Jun-24	2021-Jun-10	2021-Sep-02	2021-Oct-11	2021-Nov-02	2021-Nov-17
Bib Count	66,118,677	71,949,699	73,801,429	73,689,203	71,965,701	71,725,481

Bib Count

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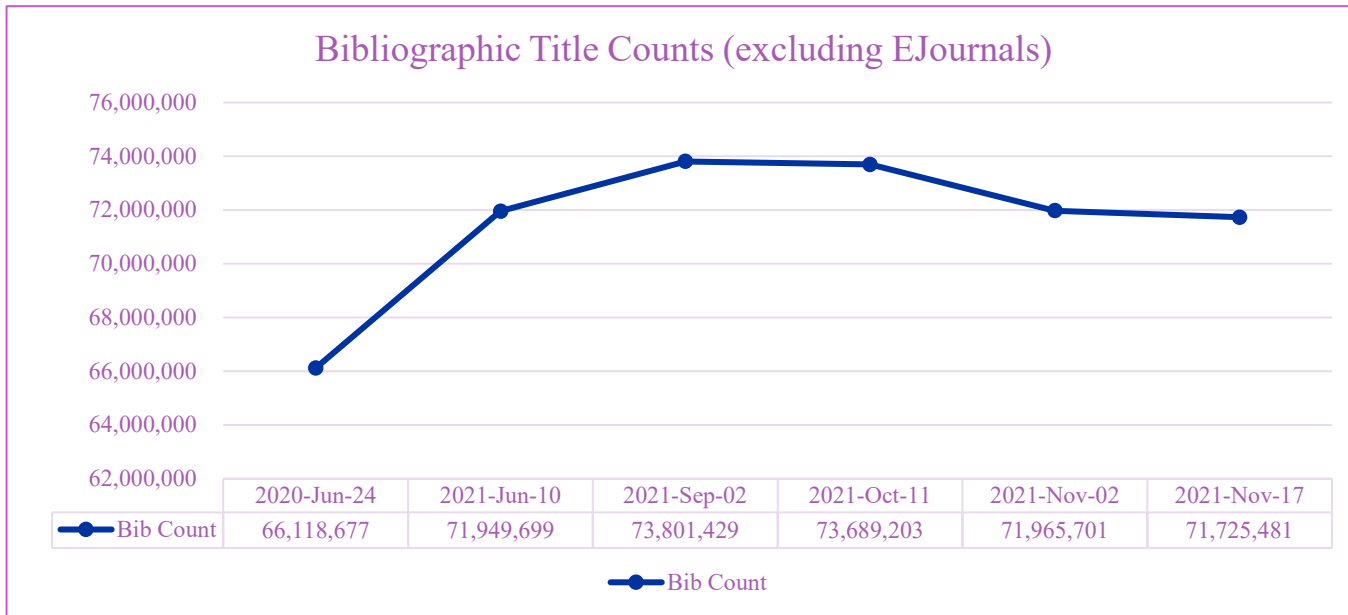
Related Records in Alma

What are Related Records in Alma?

- Bibliographic records can be related and linked together by MARC 76X, 77X, 78X, and 8XX fields

- Some of the most common fields are 773, 774, 776, 780, 785, and 830

- When any of these fields in a bib record in Alma refer to another bib record within Alma, a related record relationship is established by the system.

Related Record relationships display in Alma search results in two ways:

1. Other details tab > Related Records indicator

2. Physical inventory tab > Related Records column

AND Other details > Related Records -- only when 774, 786, 800, 810, 811, or 830 fields establish relationship

Did the FBI kill Martin Luther King? / by William Bradford Huie.

Edit Record | Order | •••

Book {Book - Physical} By Huie, William Bradford, (Nashville, Tenn. : T Nelson Inc, 1977)

Subject: King, Martin Luther,--Jr.,--1929-1968.

Creation Date: 06/15/2020 05:13:39 CDT

Modification Date: -

Language: English

Record number:
4664655-01carli_network

MMS ID:
9962107105851

● Physical (1)

1 Holdings | 1 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related Record
MAIN	stacks	HV6248.R39 H82	-	● 1 of 1 Available	✔ Related

Holdings Of Related Records | Items of Related Records

Other details

| Related Records | 1 | | Completed requests | 0 |

Publishing

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Note: The presence of the Physical inventory tab > Related Records column with
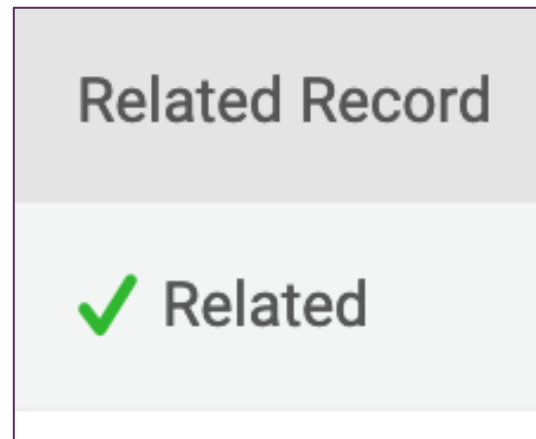
means that the holdings are not attached to bib record that you are viewing; they are attached to another related bibliographic record.

Viewing Related Records

- To see which other bib records in Alma are related, click the hotlinked number in the "Other details" tab after "Related Records"

- You can also click the "Holdings Of Related Records" or "Items of Related Records" links to see more about those records.

Why discuss Related Records in Alma?

- As part of the Title Reduction Count Project, CARLI has asked I-Share libraries to delete bibliographic records in your IZ with no holdings.

- Some of the bibs without holdings may have Related Records.

- If using the "Delete Bibliographic Records" job, CARLI recommends using the option to "Do not delete if related to other record"

- See also CARLI's webpage on how to Delete Institution Zone Bibliographic Records With No Inventory from a File

Evaluating Related Records

Example 1 – Microform record in JUD IZ

Example 2 – E-book record in PRC IZ

- "Check the shelf" to see if your library has a physical item and if so, add holdings.

- The Related Records indicators may not tell the whole story. Search in Alma for "duplicate" records (title or control numbers) that may not display as Related Records.

- If you do not have any inventory that should be on this bib, delete the bib from the IZ.

Reports of Bib Records With No Inventory

- CARLI provided I-Share libraries with reports of records in your IZs as of Sept. 29 in Box: XXX_Bibliographic_records_in_Institution_with_no_inventory_#.xlsx

  - These reports had Bound Withs REMOVED from them.

- Libraries can run the shared "Bibliographic Records with No Inventory" report in Analytics, but it will contain Bound Withs in the results.

- See the CARLI Shared Analytics: Title Count Reduction Project page

  - This page also contains information on another shared report to identify Bound Withs in your IZ.

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Bound Withs

Tip: search for MMS IDs as Keywords in Alma to reveal Bound Withs

Bound Withs

- Bound Withs are Related Records but do NOT need to be cleaned up as part of the Title Count Reduction Project
    - They were removed from the CARLI-provided reports
    - Bound With relationships legitimately have full bib records without any holdings attached in Alma and those bibs should not be deleted.
- CARLI's Bound With Practices webpage has recommendations for Bound Withs in Alma, including options for enhancing records that were migrated from Voyager, if you are interested.

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Questions?
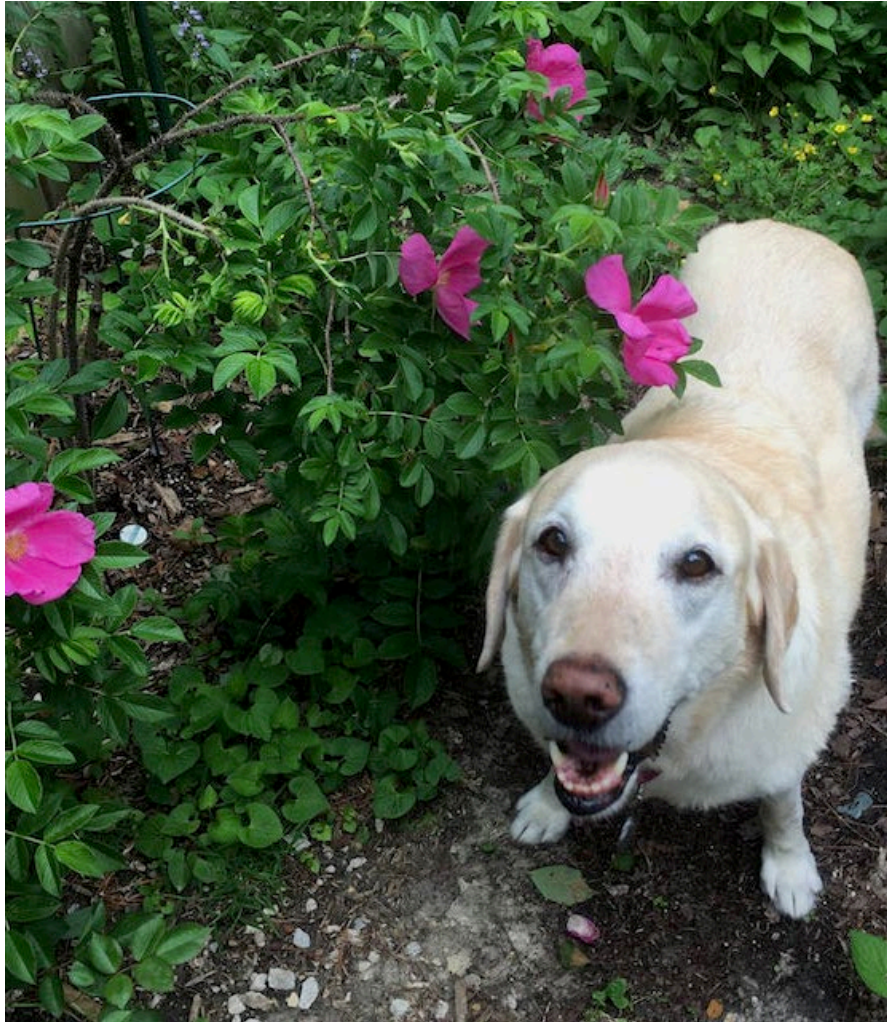
Join us December 16, 2021
at 2pm for another
Office Hour.

Contact CARLI at
support@carli.Illinois.edu