



Welcome!

Office Hours will start at 2pm and run until 3pm.

Please mute your microphone.

This session will be recorded and made available on the CARLI website.





CARLI

MAY ALMA/PRIMO VE RELEASE UPDATE

Alma/Primo VE Open Office Hours

05/09/2024



Today's Agenda

- Upcoming Events and Announcements
- Alma May Release Updates
- Primo VE May Release Updates



CARLI Calendar

<https://www.carli.illinois.edu/calendar/2024-05>

CARLI NEWS AND REGULAR PROGRAMMING

- Wednesday, May 22 – New Directors' Institute
- Thursday, May 23 – Technical Services Q&A: Annual Acquisitions Activities
- Monday, May 27 – CARLI Office Closed for Memorial Day

OPEN EDUCATIONAL RESOURCES (OER)

- Friday, May 10, 17, & 24 – Virtual Course: Understanding and Promoting Open Educational Resources
- Wednesday, May 15, 22, 29 – OER Grants Weekly Office Hour
- Thursday, May 23 – Florida OER Summit: Innovations and Trends

HIGHLIGHTED PROGRAMS

- Friday, May 10 – Weeding and Shifting Series: Panel Presentations and Discussions
- Thursday, May 16 – EBSCOHost's new user interface for Public Services Staff
- Wednesday, May 29 – Alma: Overview of Alma Anonymization



About Release Note Updates Highlights Sessions

- We encourage library staff to review the Release Notes.
- CARLI Staff review the [Alma](#) and [Primo VE](#) release notes for new features that we want I-Share libraries to be aware of:
 - New features that may help your workflows
 - New features that may change your workflows
 - Fixes to the software
- Items not covered during our sessions:
 - May not apply in our consortial environment
 - Are minor updates that don't warrant mentioning
 - Or are updates we don't recommend taking advantage of





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ALMA MAY RELEASE UPDATE





Alma – Automatic Upload Electronic Holdings Updates

Autoholdings now available for the following:

- JSTOR Books
- Project Muse – Gratis/Free Journal Content

Update to Taylor & Francis Autoholdings:

- Is now based on Unique ID
- When a multi-match on ISBN/ISSN occurs, a portfolio will need to be activated manually ONE TIME. Subsequent autoholdings jobs WILL NOT remove these manual activations.





Alma – Advanced Searching

You can now do **advanced searching** on General Notes in Alma.

For Electronic collection searches:

- “Notes tab – General Notes (Electronic Collection)”
- “Notes tab – General Notes (Service)”

For Electronic portfolio searches:

- “Notes tab – General Notes”



Filtering for History in User Details

1 - 20 of 30

Filter: LAST_MONTH

Date	Field Name	Old Value	New Value
1.. 05/07/2025 10:27:48	Purge date	-	05/01/2026
2.. 05/07/2025 10:27:25 CDT	Expiration date	-	05/01/2026

1 of 2

Figure: Screenshot showing a sample user record history tab, with the Filter values highlighted.

- New filter on the user record History tab
- May default your view to “Last month”

Changes to Fulfillment> Resource Sharing> Borrowing Requests Facets

- Applied facets listed at top of Facets pane
- Ability to search facets

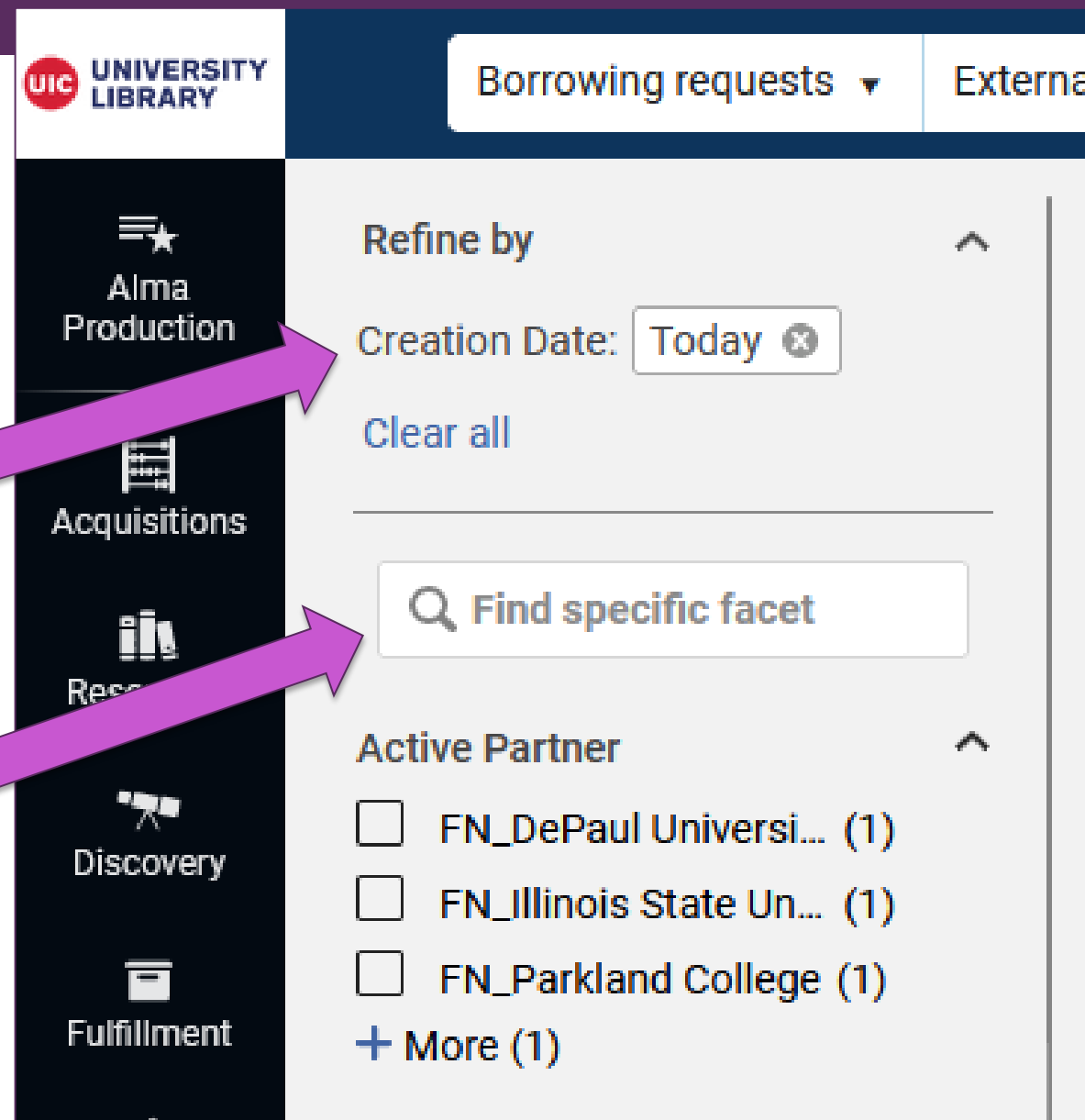


Figure: Screenshot of the Alma Fulfillment> Resource Sharing> Borrowing Requests area, showing the Facet Search and Applied Facets list.

Changes to Fulfillment> Resource Sharing> Borrowing Requests Facets

- Ability to exclude results using the checkbox to the right of the facet option
- Must click “Apply” button for facet to take effect

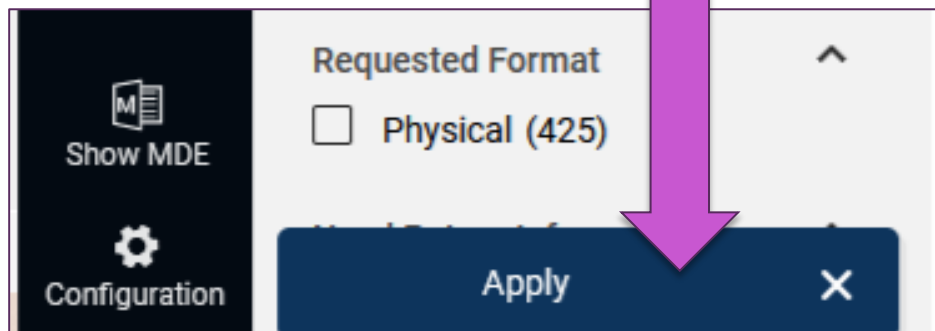


Figure: The Alma Fulfillment> Resource Sharing> Borrowing Requests area, highlighting the “Apply [facet]” button

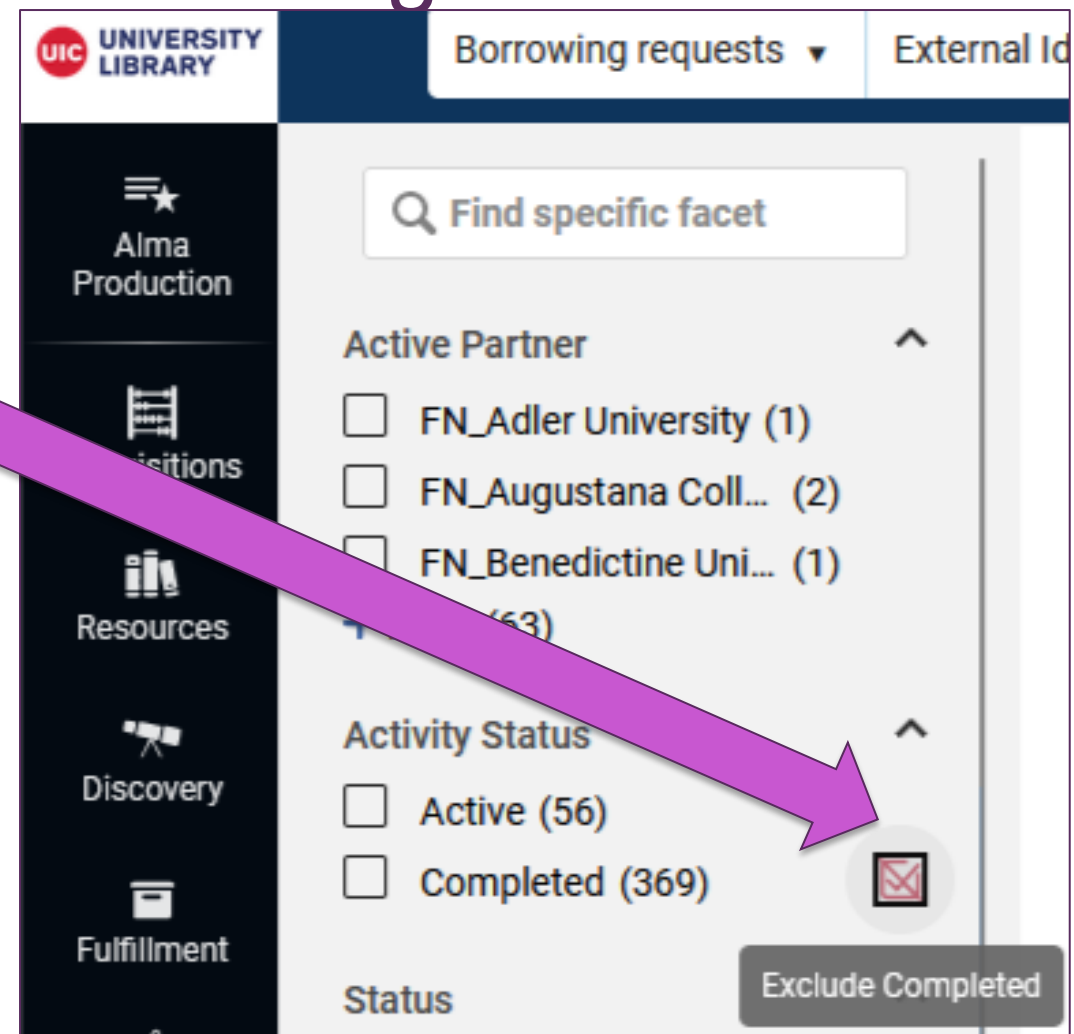
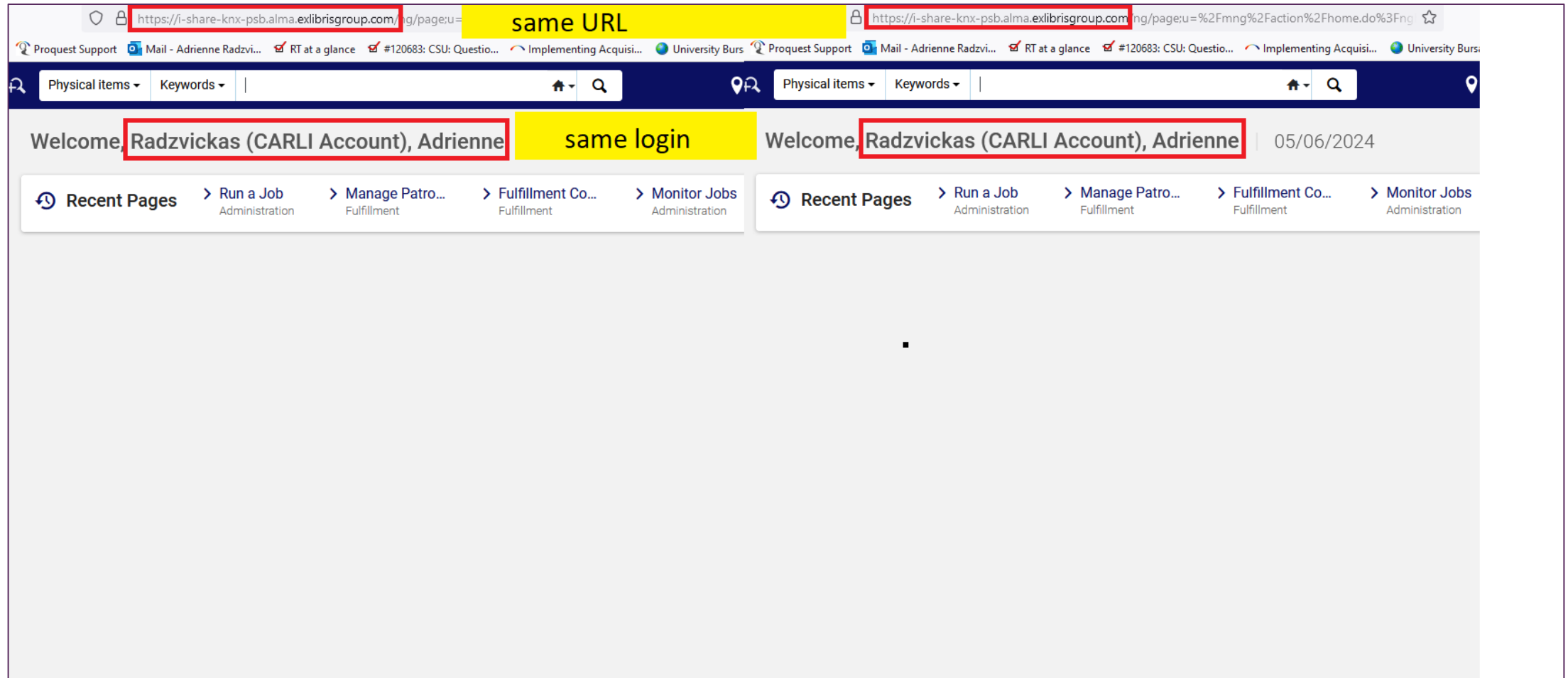


Figure: The Alma Fulfillment> Resource Sharing> Borrowing Requests area, highlighting the “Exclude Completed” option

Auto Renewal after Due Date

- Note: All of the “Fulfillment Jobs Configuration” settings in each library’s Alma Configuration settings have consortial standards and are managed by the CARLI Office staff.
- May Release Notes explain new functionality to run the job “Daily within range without repeating notification”; CARLI Staff will discuss this new setting option with the CARLI Resource Sharing Committee.

Login in Multiple Tabs in Browser



Screen capture of two Alma instances open side by side

SCHEDULING JOBS TO RUN LATER

Run a Job - Review and Confirm

General Information

Job Name

Set Information

Set ID 2366411130005858

Name Test1

Set Size 124

Schedule

SCHEDULE THE JOB TO RUN REGULARLY WITH THESE PARAMETERS

Frequency Hourly Daily Weekly Monthly Once Run Now

Date 05/06/2024

Schedule Name 16 : 15 Test1 - Scheduled

API Information

Task Parameters: Update It

Change permanent location information

No Permanent location Resource Sharing Library: Borrowing Resource

Sharing Requests (OUT, RS, RFO)

A screen capture of the scheduling widget for jobs in Alma

Monitor Jobs

Scheduled Scheduled Manual Jobs Running History

The 'Scheduled Manual Jobs' tab lists all manual jobs that the user has scheduled to be run later using the 'Run a Job' flow

1 - 1 of 1 Schedule Name Change Physical items infor

Content type: All Active: All

Active	Schedule Name	Job	Content Type	Set Name	Creator	Schedule	Next Run
<input checked="" type="checkbox"/>	Change Physical items information - Test1 - Scheduled	Change Physical items information	Physical item	Test1	carl_lajr58	Once at 05/06/2024 16:15	05/06/2024 16:15:00 CDT

ExLibris © Ex Libris, Part of Clarivate 2024

A screen capture of a scheduled job in Alma



Facets «

Library Scope: **All**

Item Material Type

- Blu-Ray And DVD (2)
- Book (2945)
- DVD (1)
- [+ More \(7\)](#)

Library

- Seymour Library (3031)
- Special Collections ... (46)

Collection

- Fiction by Knox Auth... (7)
- Middle East Conflict (1)
- PRIDE Display 2022 (1)

Process Type

- Hold Shelf (1)
- In Process (2)
- Loan (14)
- [+ More \(3\)](#)

Items are now sorted within each facet in alphabetical order.

Screen capture of facets in Alma



Status	Set Name	Type	Content Type	Content Origin	Create
1	Test Set for Manage Sets Customizati...	Itemized	Physical items	Institution only	Re
2	Test Set for Scheduling a Job	Itemized	Physical items	Institution only	Re

Customization

- User Customization
- Sections Customization
- Records Customization
- Table customization
- Facets Customization

A screen capture of the table view in Manage Sets in Alma

Records Customization

Main Columns

First Column
Use this column for primary data. It will always be displayed.

- 1 Set name
- 2 Type

Second Column
Use this column for secondary data. It will not be displayed in narrow list.

- 1 Content type
- 2 Content origin
- 3 Created by
- 4 Created on

Badges and Icons

Third Column
This column contains badges and indications. It will be displayed as icons in narrow lists.

- Notes
- Badges and Icons

Apply

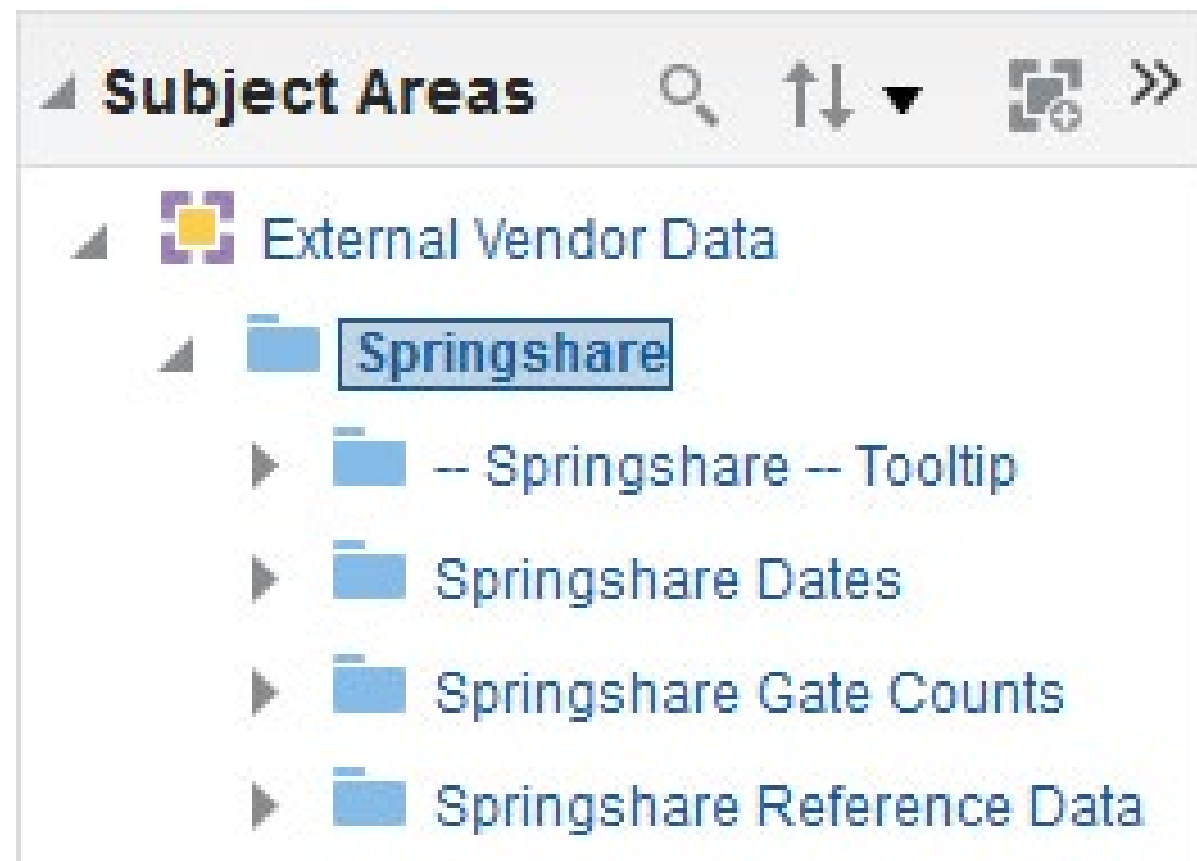
A screen capture of the Records Customization in Manage Sets in Alma

- You can view a list of your sets in a table view and can toggle the sets' status to active and inactive.
- Select Actions > Customize to view the various forms of customization.
- The bottom screen capture shows Records Customization.

You can import Springshare gate counts and reference data for use in Alma Analytics.

Detailed instructions:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/Springshare_Integration](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/010Introduction/The_Basics_of_Working_with_Analytics/Springshare_Integration)



Screen capture of the new Springshare dimensions in the External Vendor Data subject area of Alma Analytics

- New Design Analytics roles were added that are limited to specific subject areas in Acquisitions, Fulfillment, and Resources. To enable these roles, set the support_partial_analytics_designer parameter (Configuration > Analytics > General Configuration > Other Settings) to true.

6	<input type="checkbox"/>	Designs Analytics – Acquisition	Write access to analytics reports, analyses, dashboards, DV projects, etc. Limited to Acquisition, Usage, Users, Analytics Objects and Usage Tracking, DARA and API
7	<input type="checkbox"/>	Designs Analytics – Fulfillment	Write access to analytics reports, analyses, dashboards, DV projects, etc. Limited to Fulfillment, Resource Sharing, Courses, Users, Analytics Objects and Usage Tracking, DARA and API
8	<input type="checkbox"/>	Designs Analytics – Resources	Write access to analytics reports, analyses, dashboards, DV projects, etc. Limited to P, E & D resources, Users, Analytics Objects and Usage Tracking, DARA and API

Screen capture of the new Analytics roles in Alma.

- The Public Access Model field was added to the E-Inventory > Electronic Collection and E-Inventory > Portfolio Details for Consortia Members > Electronic Collection.





Community Zone records identified in editor header

- Image below shows a magenta box stating Community Record
- MDE may also alert users when saving changes that could affect community

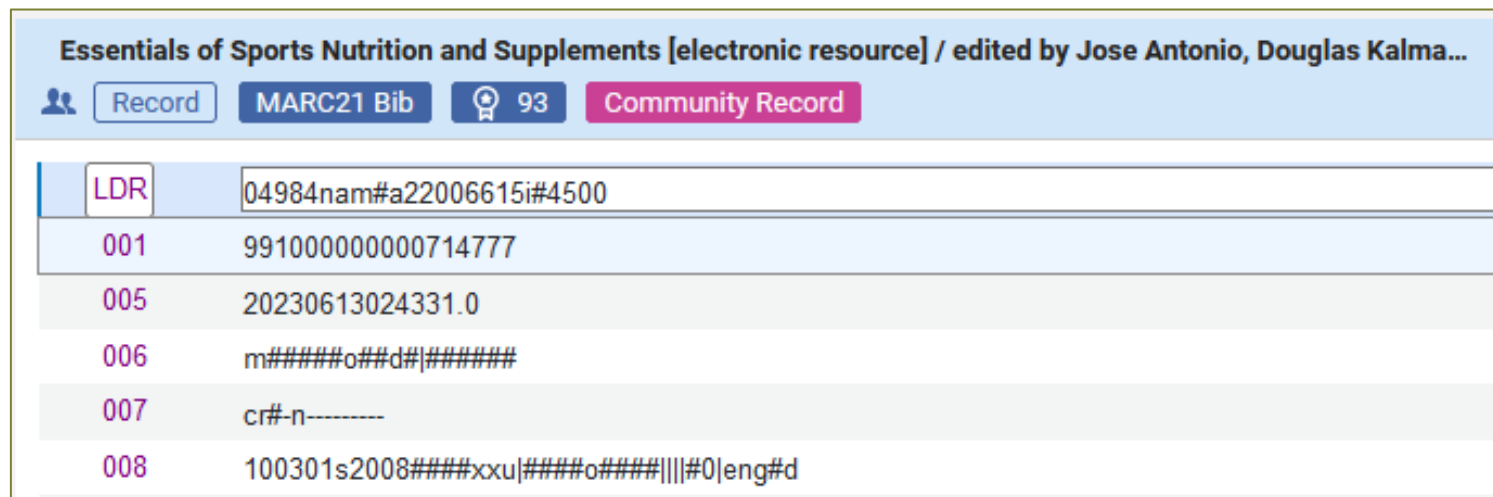


Image of the record header and initial fields of a MARC record in the Alma metadata editor that comes from the Community Zone. A new magenta “Community Record” tag calls out this record as a community record.

Record version history includes management tags

- Useful when troubleshooting data sync and publishing
- Below image shows that the previous version had no bibliographic suppression, no search suppression, and no publishing to data sync.

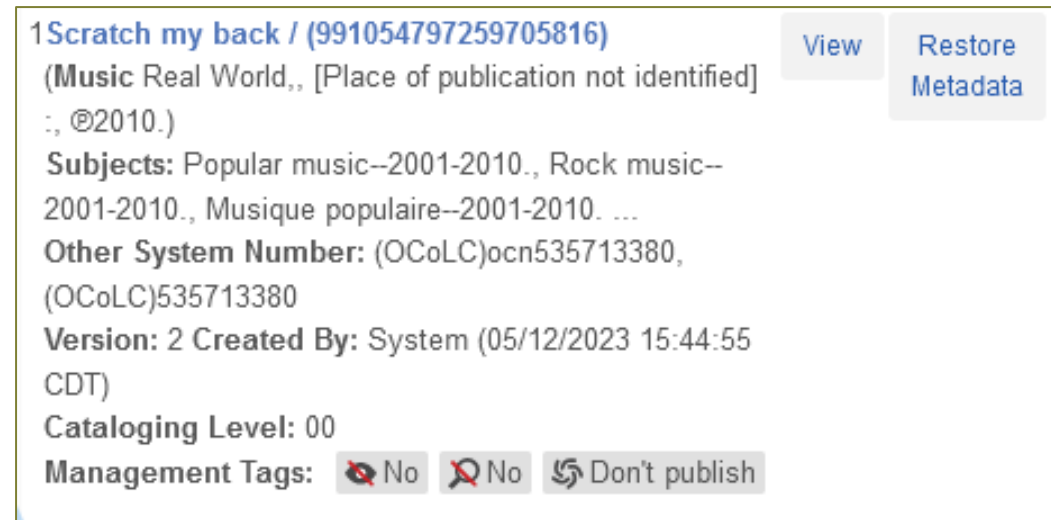


Image shows a summary of the previous record version for the Compact Disc Scratch My Back. The new management tags show no bibliographic suppression, no suppression from Z39.50 searching, and Don't publish to the OCLC data sync.

Browse Shelf List enhanced to index full call number

- Search and Browse > Browse Shelf Listing
- Depends on position of cursor in a specific bib or holding tag
 - In image below, cursor is in the 852 field of the holding record.
- Note: Holding call number (852\$h \$i) contains *your* call number

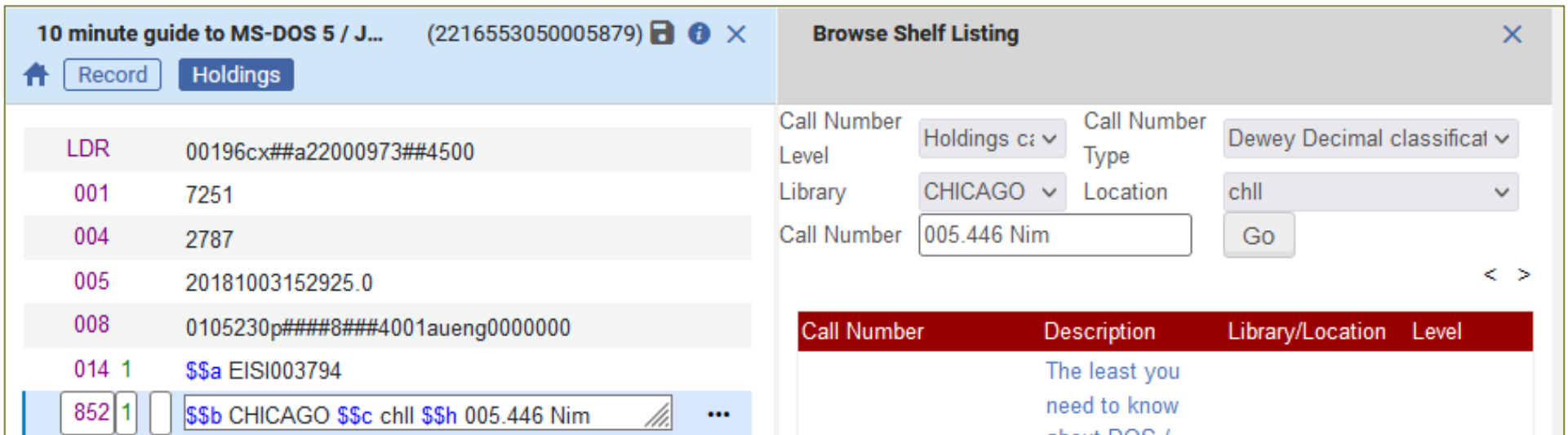


Image of the Alma metadata editor view with a holding record on the left and the browse shelf listing box on the right.

Create an item template from an existing item

- Use Save as Template button (highlighted below) to store the template.

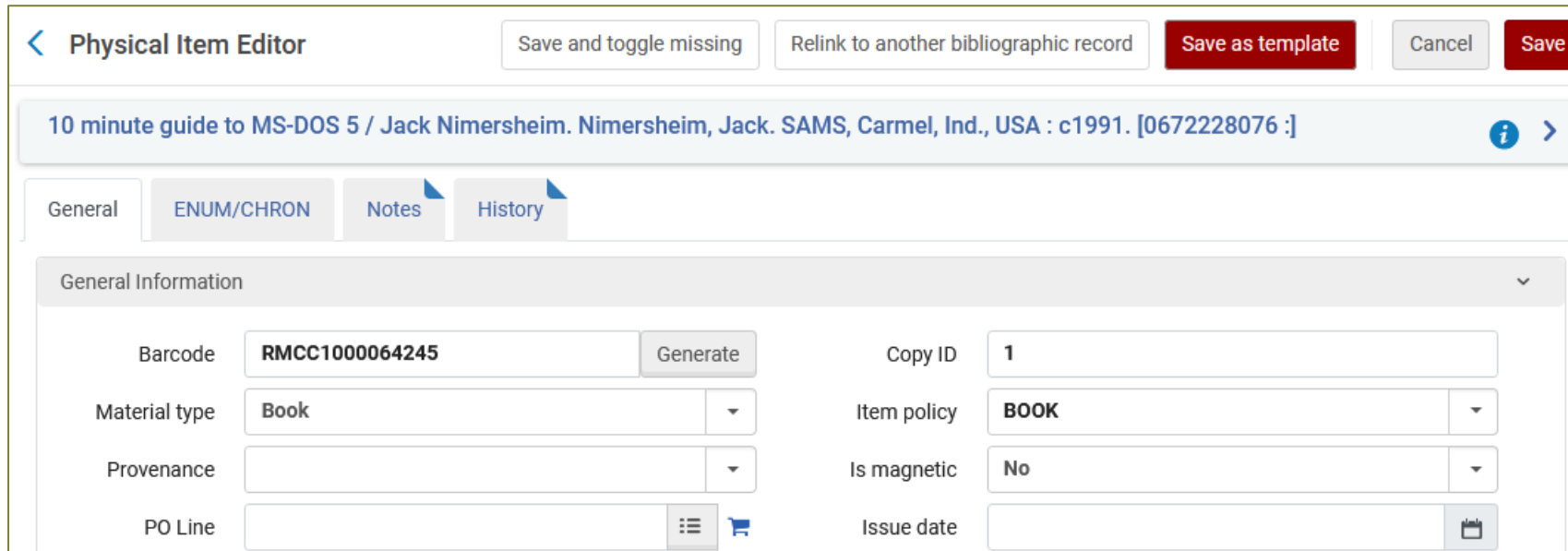


Image showing the top section of the physical item editor with the Save as Template button highlighted by the mouse cursor.

Physical Item Templates

Create a template by adding a name

Public template = usable by anyone at institution

- See below, creation of a public template “Book c1”

Save as template

Note that all item fields that were filled in will be kept in this template, except for the following: Barcode, Inventory number, Pattern information, Process type, At (request department), Item call number prefix/suffix, and Temporary call number prefix.

Template Name *

Existing Templates

Public template? * No Yes

Image of the Save as template dialog, prompting for a new template name and whether the template is public or not. A note will appear that states which fields will not be retained in the template.

Add Item from Template available from items list and MDE

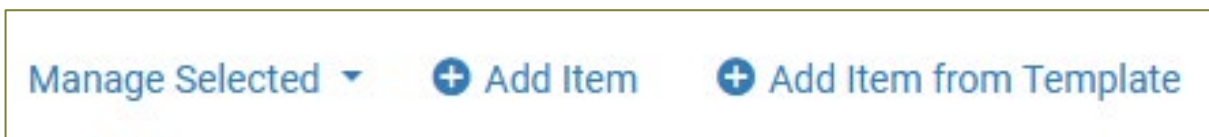


Image of actions available for the list of items screen, including Add Item from Template on the right

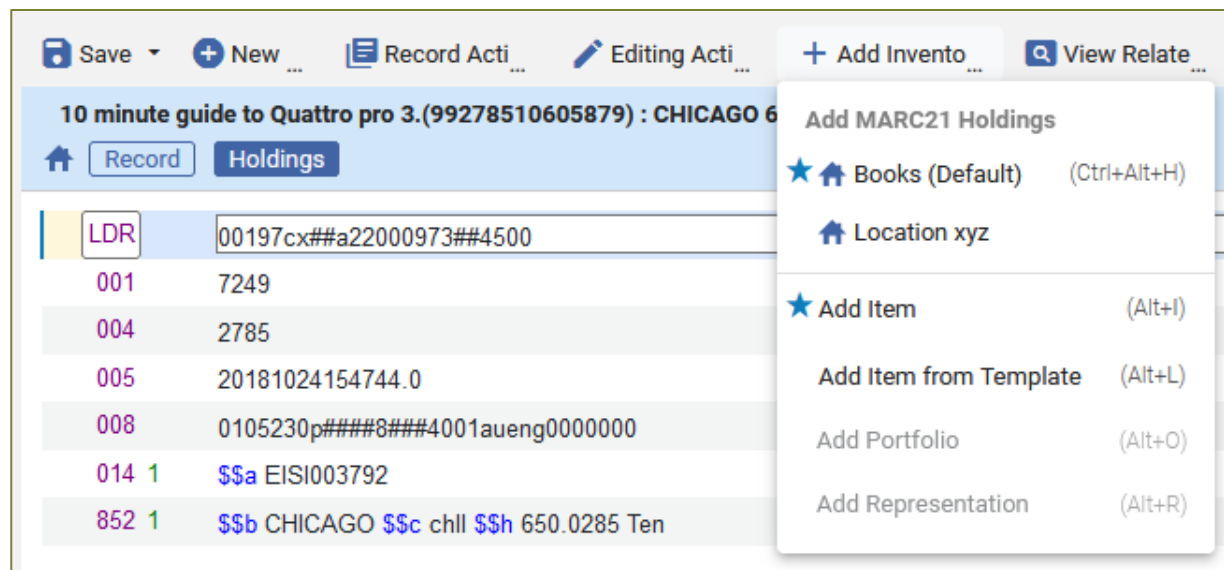


Image of the Alma metadata editor with a holding record in the editor and the add inventory menu expanded. The Add Item from Template option is active, and shows the shortcut Alt+L.

- BIBFRAME records now supported by the Alma platform
 - BIBFRAME records may be used in existing searches and workflows
 - Importing and editing BIBFRAME records will be different
- BIBFRAME support is off by default in each IZ
 - Possible exploration by CARLI later in the year
- Linked Open Data enrichment configuration
 - Select vocabularies and linking field (\$0 or \$1)
 - Use with Alma Refine, metadata editor, or other tools
 - Vocab: Homosaurus, Getty, WikiData, ORCID, Geonames





- Browse authority headings list displays if heading is “local”
- Search resources includes standard number (e.g., 024, 028)
- Full call number, including \$b, added to search indexes
 - Applies indexing improvements to All Titles and other searches
- MARC21 Profile updated with new MARC tags and subfields





Quick Ordering from Amazon

- Combines New Order API with a browser plugin, “Order It!”
 - Some assembly required: integration, browser, testing match settings
- Users with Purchasing roles may add the plugin as a bookmark.
 - Go to Acquisitions menu > Advanced Tools > Order It! Bookmark
 - Drag to your bookmarks/favorites location.
- Search Amazon for selected item, then call bookmark.
 - *Order It!* fills in title details.
 - Excellent use case for PO line templates for the rest of the POL.
- More in the Alma Highlights video on [Order It!](#)



- EDI enhancements to include quantity and Access Model
- View PO Lines that are Assigned to Others
- More alerts on Receive Item pop-up for receiving from POL
- MARC21 Profile updated with new MARC tags and subfields





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PRIMO VE MAY RELEASE UPDATE

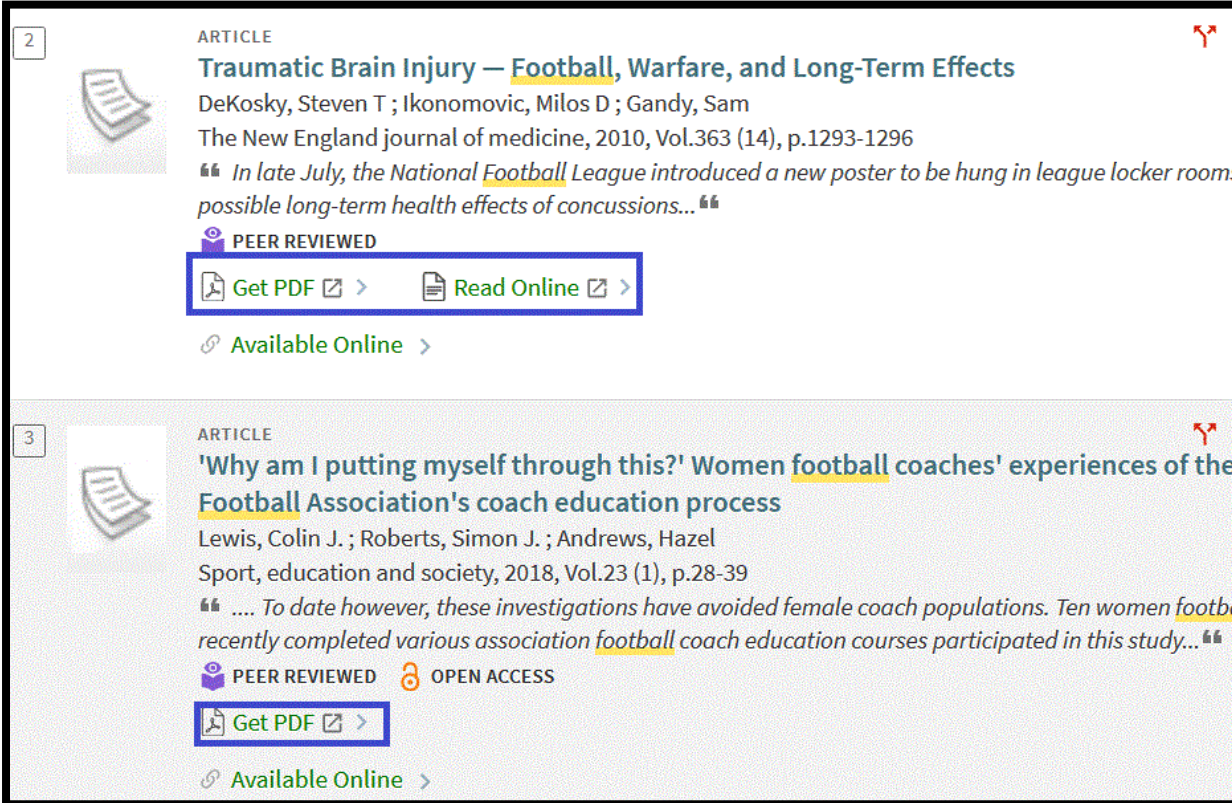


Primo VE – QuickLinks Major Change

Automatically Enabled QuickLinks

- QuickLinks option now at Institution level with this change in May 2024. (Was at “View” level)
- Alma made “QuickLinks in brief results displays” the **_default_** in May 2024
- Can opt out of this new Institution level parameter via Alma Configuration > Discovery > Other > Customer Settings > auto_switch_quicklinks
- More [information on QuickLinks](#)
- QuickLinks’ [cooperating vendors](#).

Primo VE – QuickLinks Examples



The screenshot displays two article entries from a Primo VE search results page. Each entry includes a document icon, a title, author information, journal information, a quote, and action buttons. The 'Get PDF' and 'Read Online' buttons in the first entry are highlighted with a blue box. The 'Get PDF' button in the second entry is also highlighted with a blue box.

Entry 2:
ARTICLE
Traumatic Brain Injury – Football, Warfare, and Long-Term Effects
DeKosky, Steven T ; Ikonovic, Milos D ; Gandy, Sam
The New England journal of medicine, 2010, Vol.363 (14), p.1293-1296
“ In late July, the National Football League introduced a new poster to be hung in league locker rooms, possible long-term health effects of concussions... “
PEER REVIEWED
[Get PDF](#) > [Read Online](#) >
[Available Online](#) >

Entry 3:
ARTICLE
'Why am I putting myself through this?' Women football coaches' experiences of the Football Association's coach education process
Lewis, Colin J. ; Roberts, Simon J. ; Andrews, Hazel
Sport, education and society, 2018, Vol.23 (1), p.28-39
“ To date however, these investigations have avoided female coach populations. Ten women football recently completed various association football coach education courses participated in this study... “
PEER REVIEWED OPEN ACCESS
[Get PDF](#) >
[Available Online](#) >

A screenshot of Primo VE article results with QuickLinks examples of “Get PDF” and “Read Online” highlighted

Primo VE – New Linking Template for InfoBase

Template Name	Syntax
infobase_pub_linking (All InfoBase collections <u>except for Films on Demand</u>)	http://online.infobase.com/Auth/Index?aid={customerID}&itemid={{control/addsrcrecordid}}&articleId={{control/sourcerecordid}}

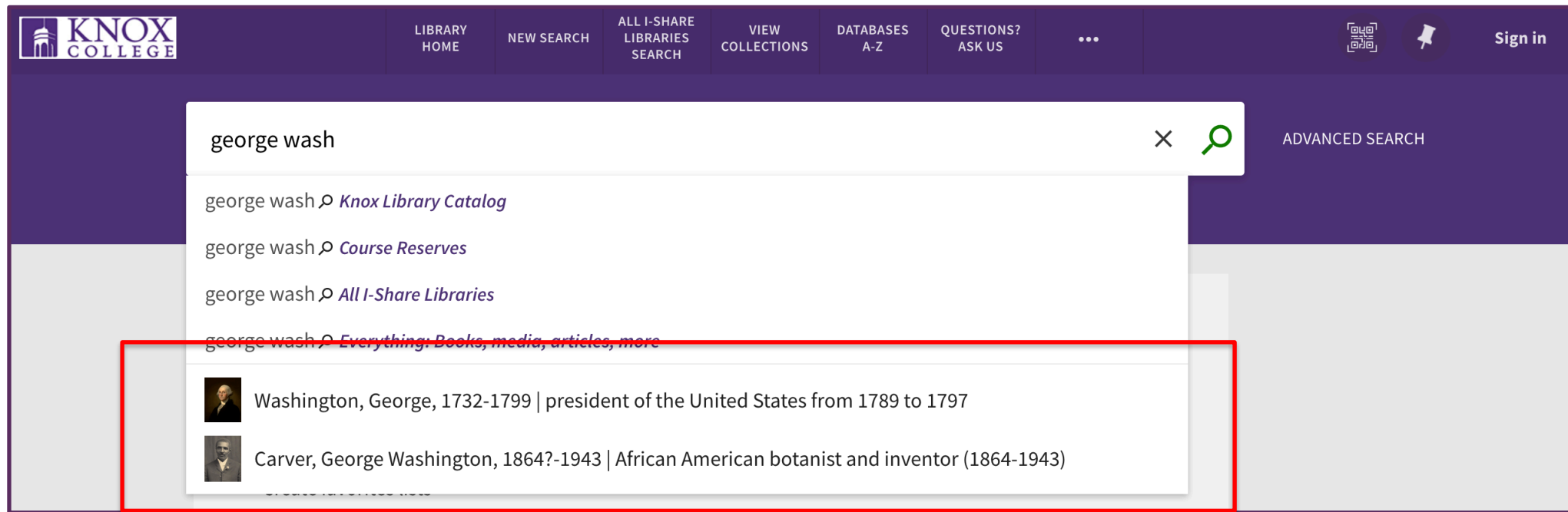
A screenshot of the linking template name and syntax

More information on [Configuring the Central Index Linking Templates](#)



Primo VE can now associate person entities in bibliographic records using LC Names Authority headings through Linked Open Data to provide two new discovery features:

1. Person entity suggestions at the bottom of Auto Complete in the simple search box



A screenshot of a simple search for George Wash showing how autocomplete suggests Person Entities





2. Person entity info cards for Related Persons in the Full Record display

BOOK
George Washington in the American Revolution, 1775-1783
Flexner, James Thomas, 1908-2003.; Washington, George, 1732-1799.
1968
[Available at Seymour Library Main Stacks \(E312.25 .F69\) >](#)

TOP
TOOLS
GET IT
LINKS
DETAILS
VIRTUAL BROWSE

Tools

QR EXPORT RIS PRINT RECORD CREATE CITATION EMAIL RECORD PERMALINK

Get It


REQUEST: [Request It For Pickup](#) / [Request Item via I-Share](#)


LOCATIONS

Seymour Library
[Available](#), Main Stacks ; E312.25 .F69 >

[GET IT FROM OTHER INSTITUTIONS >](#)

Related Persons


Flexner, James Thomas, 1908-2003
American biographer (1908-2003)
[Show more](#) v


Washington, George, 1732-1799
president of the United States from 1789 to 1797
[Show more](#) v

A screenshot of the Full Record page in Primo VE showing Related Persons entities





Both of these options lead to the Person Page with more information enriched from Wikidata, including titles by person and titles about the person, as well as other people associated with that person.

Washington, George, 1732-1799

president of the United States from 1789 to 1797

George Washington (February 22, 1732 – December 14, 1799) was an American Founding Father, military officer, and politician who served as the first president of the United States from 1789 to 1797. Appointed by the Second Continental Congress as commander of the Continental Army in 1775, Washington led Patriot forces to victory in the American Revolutionary War and then served as president of the Constitutional Convention in 1787, which drafted and ratified the Constitution of the United States and established the U.S. federal government. Washington has thus become commonly known as the "Father of his Country". Washington's first public office, from 1749 to 1750, was as surveyor of Culpeper County in the Colony of Virginia. He subsequently received military training and was assigned command of the Virginia Regiment during the French and Indian War.
[See more in Wikipedia](#)

Born	1732-02-22, Westmoreland County (Va.)
Died	1799-12-14, Mount Vernon (Va.)
Field Of Work	United States--Politics and government
Occupation	Founding Fathers of the United States, Presidents, Statesmen, Politicians, Generals
Source	Library of Congress Name Authority and Wikidata

Titles in the Library By Washington, George, 1732-1799

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[See All Titles](#)

Titles in the Library Written About Washington, George, 1732-1799

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[See All Titles](#)

People Associated With Washington, George, 1732-1799

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Screenshot of the Full Record display page with Person Entity Linked Open Data



These features are not on by default. You can turn each of them on independently, if desired, and it will apply to ALL Primo VE Views:

Configuration > Discovery > Other > Customer Settings

1. **enable_person_entity_info_card** – Set this parameter to **true** to enable the Person Info Card on the Full Display page.
2. **enable_person_entity_autocomplete** – Set this parameter to **true** to enable autocomplete for person entities. (Note that Auto Complete must be Enabled in the View Configuration first.)

You can adjust the labels of the new sections, if desired.

Feature only works with Library of Congress Name Authorities in this iteration.





Before May release: could limit CDI search scopes to INCLUDE only records of specific [CDI Resource Types](#) (up to five types).

After May release: can instead limit CDI search scopes to EXCLUDE records of specific [CDI Resource Types](#) (up to five types).

In Alma Configuration > Discovery > Search Configuration > Search Profiles > Edit the CDI search profile > click the Row Action menu (ellipsis) > Edit Resource Type selection

Define CDI search scope - Resource Types

Select type of scope: All CDI resource types Selected CDI resource types

Include resource types Exclude resource types

+ Add ▾

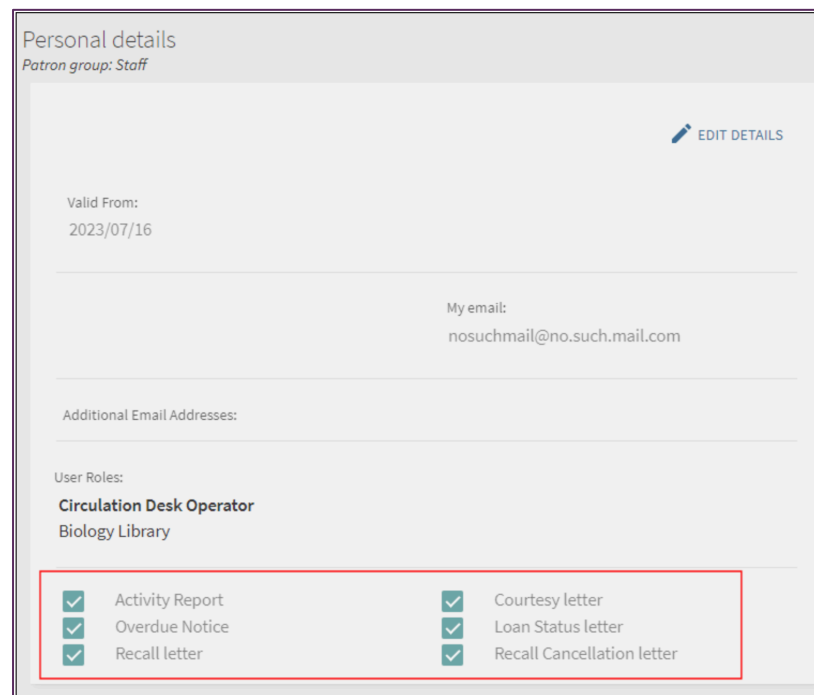
No records were found.

Cancel Save

Screenshot of the CDI search scope Resource Types include/exclude options



Library Card Options to Allow Users to Opt Out of Receiving Notices



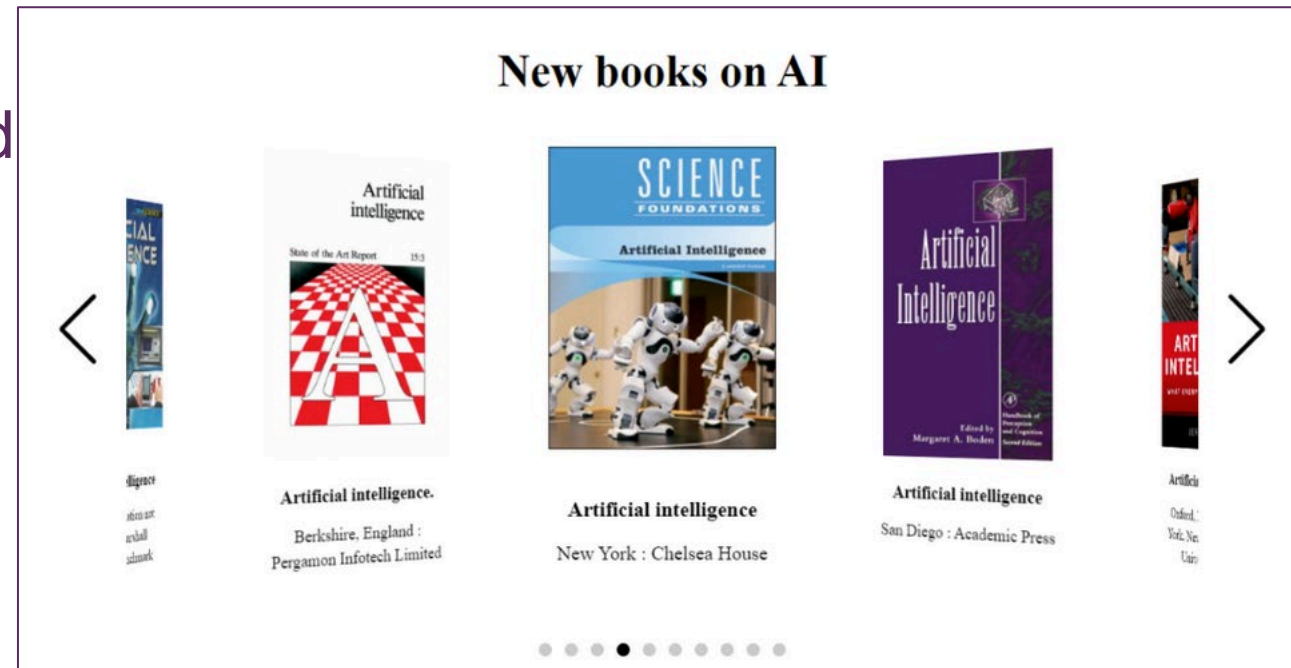
A screenshot of My Library Card showing the undesirable options to opt out of notices.

Please do not enable these options in the patron's Library Card.





- Can now be embedded within Primo VE, not just on external websites.
- Number of items has been increased to 20 (from 10).
- Now supports local thumbnails.
- Ex Libris has made several Accessibility improvements.
- CARLI Discovery Primo VE Committee's June 11, 2024 webinar [Connecting to Your Best Stuff: Elevating Resources in Primo VE](#) will discuss the Showcase, Resource Recommender, and Search Ranking. Register now!



An example Primo VE Showcase showing new books on AI

Thank you for attending!

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



Decoration: A bouquet of brightly colored spring flowers in a glass jar sitting on a gold-colored table. A library card file is in the background, out of focus.

