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. Slides and references for today are available at

https://www.carli.illinois.edu/alma/primo-ve-quarterly-release-update

CARLI

I-SHARE QUARTERLY ALMA PRIMO VE UPDATE: AUGUST 2024 FEATURE RELEASE

AUGUST 1, 2024

Agenda – 8/1/2024

- Announcements and Reminders

- Upcoming events

- Today's Topic: August 2024 Feature Release

Announcements and Reminders

Sandbox update

- Sandbox Refresh will occur on **August 11**.

- An email with details about backing up your work and ceasing work on third party integrations was shared last week.

New I-Share Libraries are live in Alma, Primo VE, and AFN!

(Chicago Theological Seminary, City Colleges of Chicago, College of Lake County, Elgin Community College, and Prairie State College)

Upcoming Events

https://www.carli.illinois.edu/calendar

- 8/15/24 - Newberry Library Tour Invitation for those attending SAA annual meeting

- 8/20/24 – 8/21/24 – Free People Read Freely Symposium https://www.carli.illinois.edu/Free-People-Read-Freely
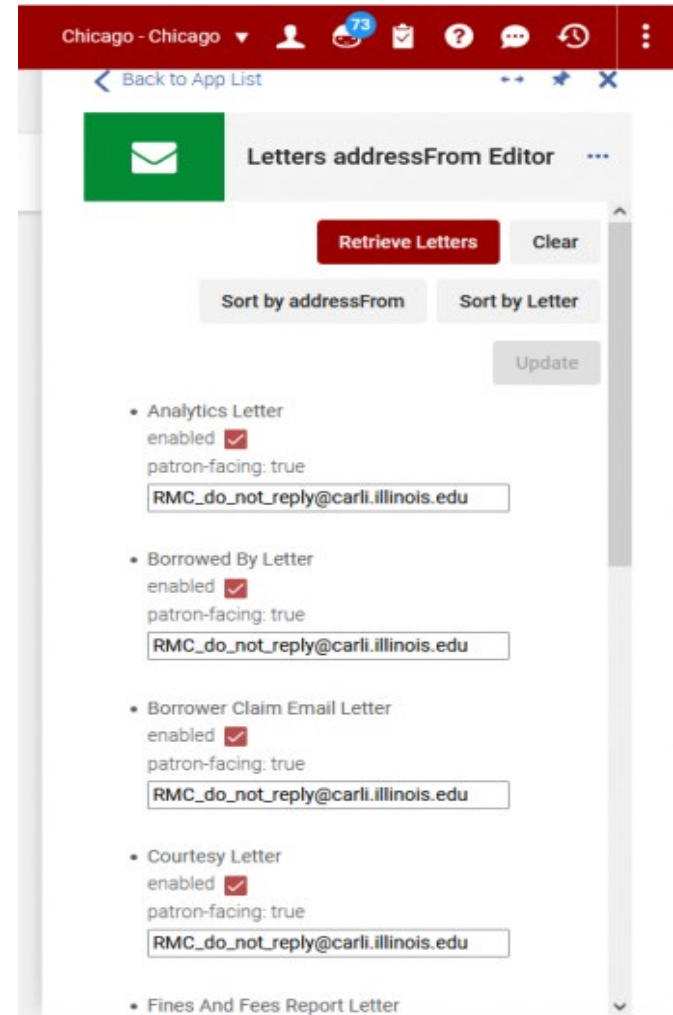
[Image Description: Free People Read Freely logo]

Cloud Apps are applications written by members of the Alma community that run inside Ex Libris products such as Alma, Primo VE, and Leganto. These apps add features beyond the core functionality found in the products themselves.

[Image Description: A screen capture of CARLI's Letters addressFrom Editor cloud app]

Cloud App config now includes two new options for controlling usage of cloud apps in the institution. Admins can configure one, both, or neither of these options.

1. The admin can configure cloud apps to be available for activation only by users with the relevant role/s required by that cloud app.

2. The admin can control which users can activate and use cloud apps by giving specific users the new Cloud App Operator role.

Additional Information

Configuring and Working with Cloud Apps (ExL Knowledge Center)
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/Configuring_Cloud_Apps

Cloud Apps in Alma (CARLI Documentation)
https://www.carli.illinois.edu/products-services/i-share/external-system/cloudapps
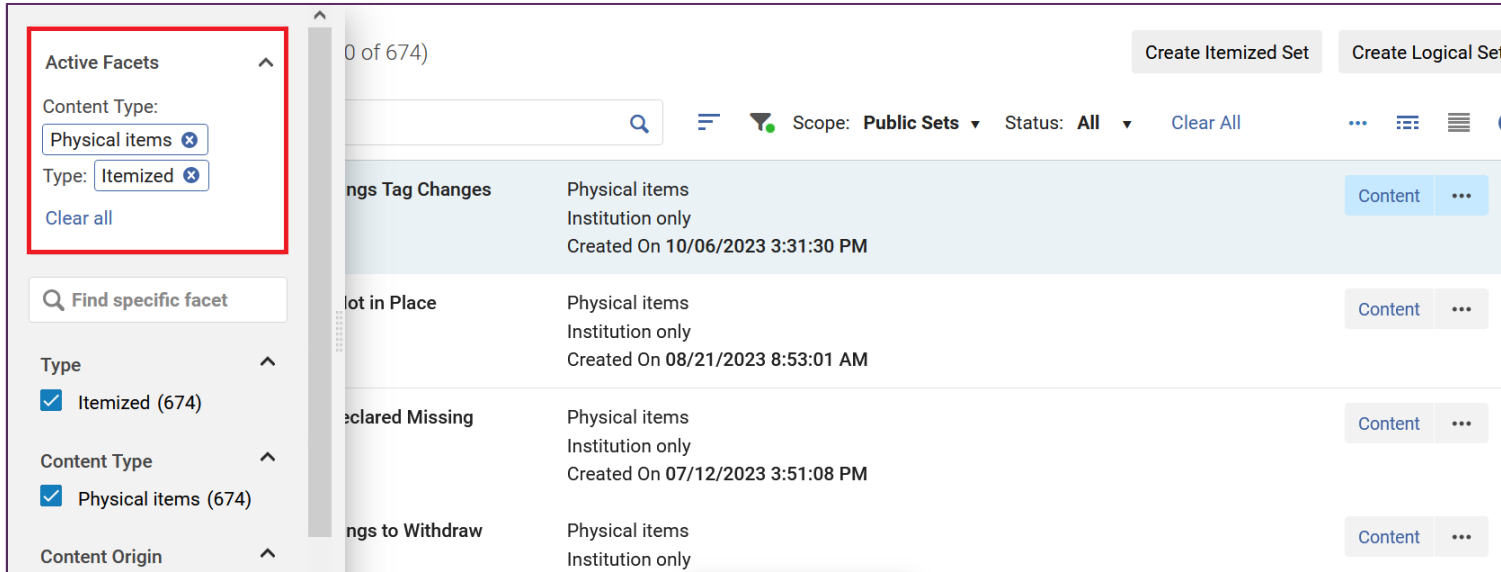
[Image Description: A screen capture of the search facets showing active facets]

A section was added to the facets for certain searches that displays the actively selected facets. This applies to PO lines, resource sharing requests, sets and relevant searches such as physical holdings.
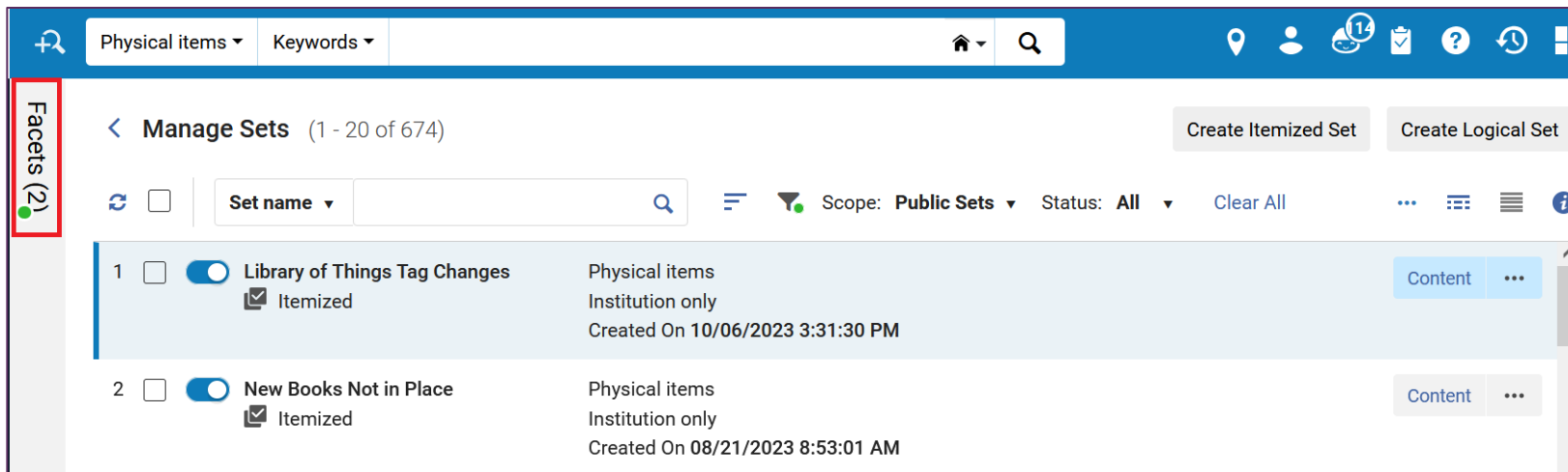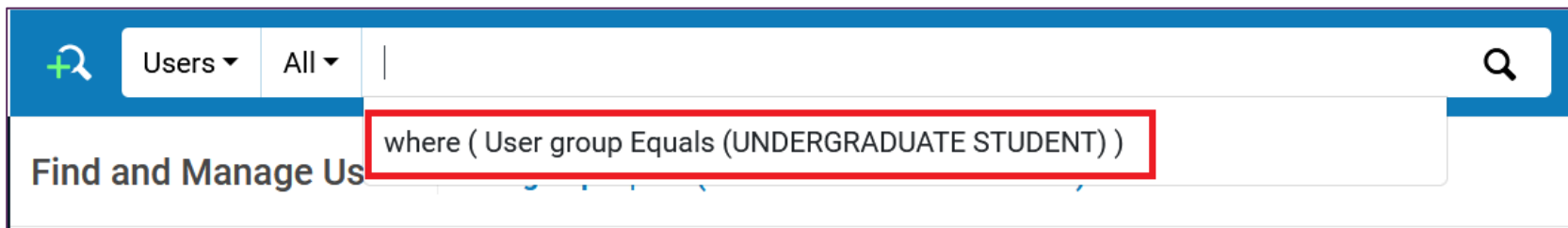
[Image Description: Screen capture of active facets in collapsed pane]

- When you collapse the facets pane with active facets, it will show an indicator that there are active facets and the number of them.

- If you hover over the indicator, a tooltip shows which facets are selected.
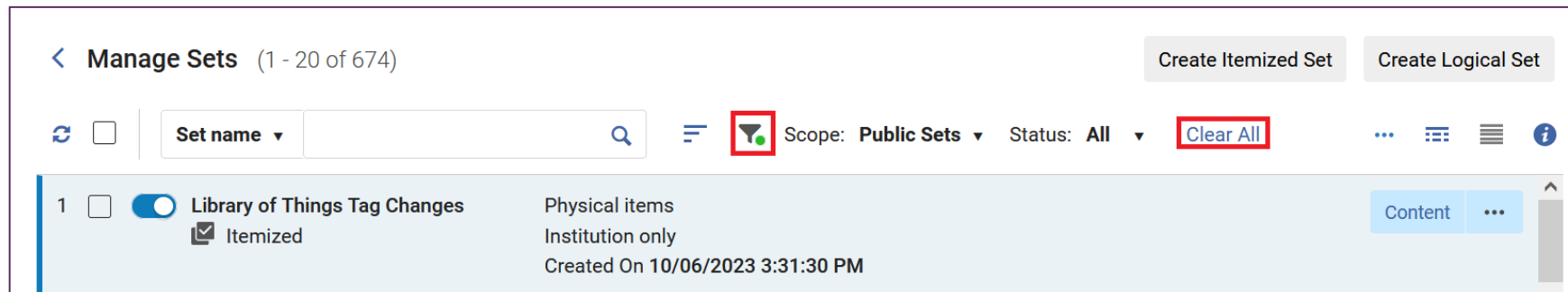
[Image Description: Screen capture of the Filter icon with a green dot and the Clear All link in the Manage Sets window]

- When you have selected a non-default filter, such as My Sets in the Manage Sets window, a green dot is displayed by the Filter icon.

- Also, the Clear All link is provided to easily clear all filters.

[Image Description: Screen capture of dropdown in search box.]

The simple and advanced searches contain recent searches in the dropdown from the search box.

- New setting will be tested in sandboxes, then in production.
- If all goes as planned, the "How To: Request Maintenance" page will be updated.
- Fall webinar TBA on reviewing the request maintenance steps in Alma.

[Image Description: Screenshot shows the Alma parameters screen of the Change Physical items information job.]

[Image Description: The Summary bar for funds.]

- When using multiple funds for a POL, the total for the funds will be displayed in the "Funds and Pricing" section.

New Fields Added to "Update PO Lines Information" Job

- Additional PO line reference field
- Cancellation Restriction
- Cancellation Restriction Note
- Add labels from list
- Remove labels
- Create new label
- Reclaim interval
- Subscription interval
- Note to vendor
- Vendor reference number type

- Routing during receiving
- Binding during receiving
- Activation note
- Renewal date
- Subscription from
- Subscription to
- Renewal reminder period (days)
- Renewal note
- Internal note

- New Fields added to Transactions Tab of Funds and Ledgers
  - PO Line Description
  - Creator

[Image Description: The PO Line Description and Creator fields.]

- To display these fields select the "Table Customization" gear on the right and tick the field names.

Two new POL Types to support Open Access Workflows:

- Article Processing Charges (APC) – One Time
- Article Processing Charges (APC) – Subscription

These new POL types are without inventory. They can be linked to the appropriate vendor, relevant license, price, and funding source.


[Image Description: Two APC PO Lines.]

- When creating a new POL Alma can copy the POL price to the replacement cost field.

- This can happen when:
    - A new POL is created
    - A POL list price is edited
    - The quantity ordered is changed

- To activate:

    - Configuration > Acquistions > General > Other Settings > replacement_cost_copied_from_POL
        - 0 – False (DEFAULT)
        - 1 - Copy the price from the PO line's List price field
        - 2 - Copy the price from the PO line's Net price field and divide by number of items in the Ordered Items section.

Contributor Pages for Name Authorities
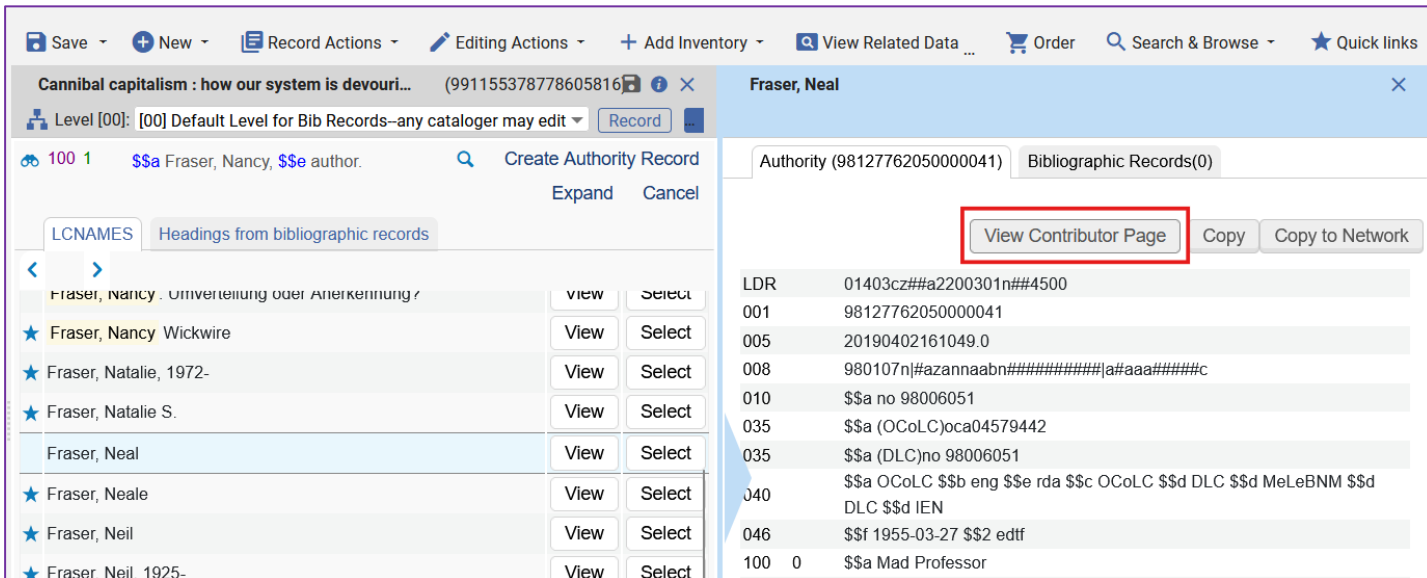
[Image Description: A screenshot of the Alma metadata editor displaying a list of name headings and a single name authority record. The name authority record includes a button for View Contributor Page.]

When linking or validating name authorities in the metadata editor (F3), the authority record view *may* link to a Contributor Page.

Contributor Pages for Name Authorities (continued)

[Image Description: A screenshot of Alma's Contributor Page for an individual. The page includes a brief description of the person, a button to generate a new search, and a list of titles if they are available.]

Create Multiple Items with Item Template

[Image Description: A screenshot of Alma's add item from template window, with the new Create multiple items option selected and a number of items box filled in.]

The Add item from template window now includes an option to create multiple items.

Fields for Physical Items Results Screens

New fields added to Physical Items search results screen

- Receiving Date
- Receiving Operator
- Public Note
- Fulfillment Note
- Internal notes 1-3
- Statistical notes 1-3

To activate and arrange these fields, click the "table customization" gear icon above the list of results.

Fields for Physical Items Results Screens (continued)

[Image Description: A screenshot of Alma's physical search results screen showing an item record. The customization gear appears above and right of the results list, and the item in the result includes details for Internal Note 3, Receiving Date, and Receiving Operator.]

New fields—if activated with the gear icon—appear only when data are present.

Fields Available for List of Items Screen

[Image Description: A screenshot of Alma's list of items table showing two items for a resource, and showing the configuration list expanded to show the new fields: condition, fulfillment note, internal note 1, statistics note 1, and public note.]

Click the gear icon to customize the columns shown in the list of items table; scroll to the bottom of the list and click Done to save changes.

- In Analytics Objects, the feature to select the Alma roles that have access to an analytics object were enhanced.
  - You can now open a dialog box and select the roles with which you want to share the analytics object.
  - The roles are categorized to make it easier to find specific roles.
  - You can select all of the roles in the category or select specific roles within a category.

- The next slide will show a side-by-side comparison between the previous Analytics Objects method of selecting a role in comparison to the new enhanced method.

Below displays the "share" pane after an Analytics object is selected, in a side-by-side comparison between the previous Analytics object and the enhanced Analytics object

- ## Previous Analytics Object view
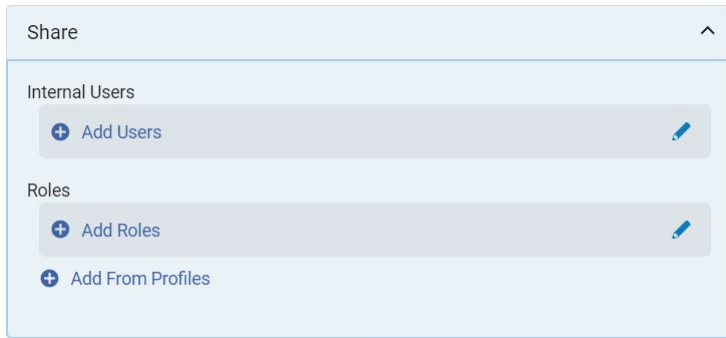
[Image Description: Previous Analytics Object's "Share" pane.]
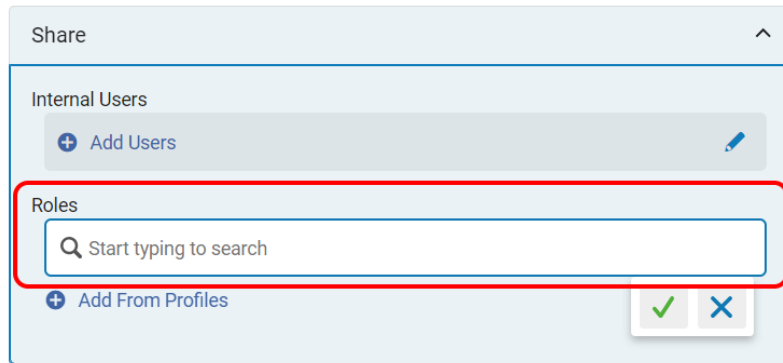
[Image Description: Previous Analytics Object's "Share" pane after clicking into the Roles field. The Roles field is enclosed in a red rectangle.]

- ## Enhanced Analytics Object view
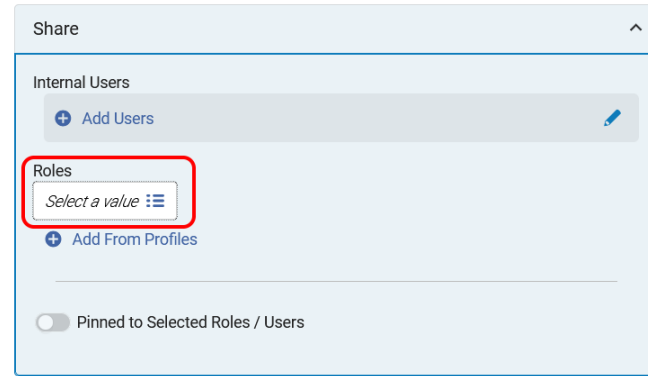
[Image Description: Enhanced Analytics Object's "Share" pane. The new Roles selection is enclosed in red.]
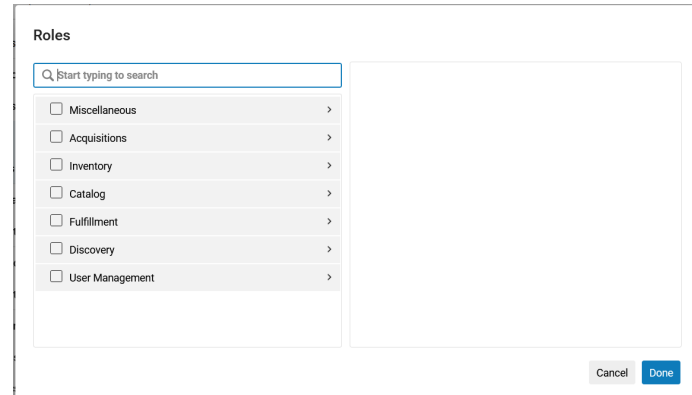
[Image Description: Enhanced Analytics Object's Roles pop-up window allows for enhanced selection of the Alma roles to share this object.]

- One possible option, selecting all of the Alma roles in a particular category, i.e. all of the acquisitions related roles in Alma are selected.

- A second possible option, choosing just a single Alma role, i.e. just "Acquisitions Administrator" is selected.
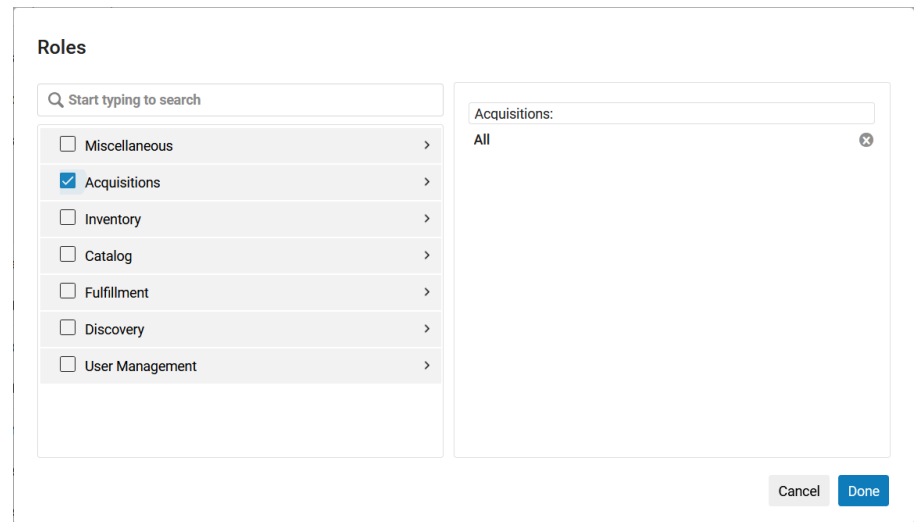
[Image Description: The roles pop-up window showing the entire category of "Acquisitions" is selected.]
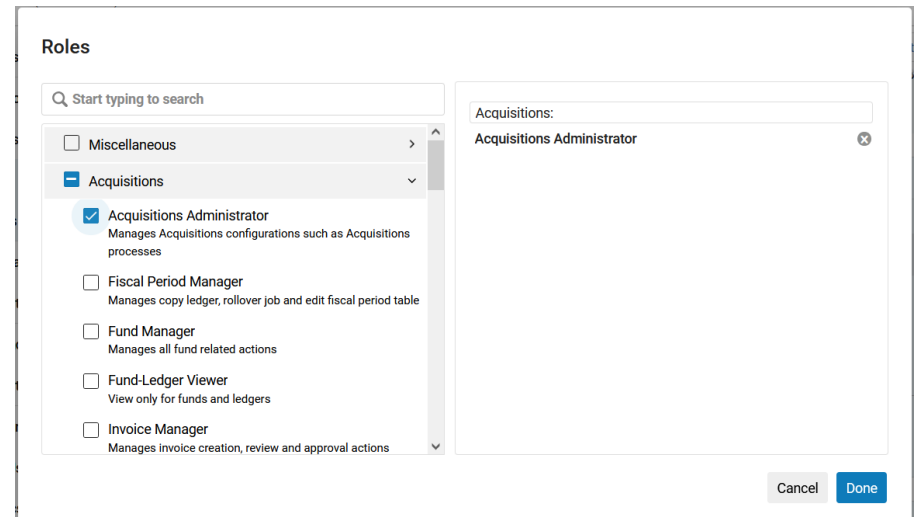
[Image Description: The roles pop-up window showing only the role of "Acquisitions Administrator" is selected.]

- In this new enhanced role selection feature, the role of "Acquisitions Administrator" has been selected for this analytics object.
    - This Analytics object will be shared with all Alma users at this institution who have the role of Acquisitions Administrator.
    - Note the "Pinned to Selected Roles / Users" toggle can now be toggled. This toggle is only enabled after roles or users are selected.
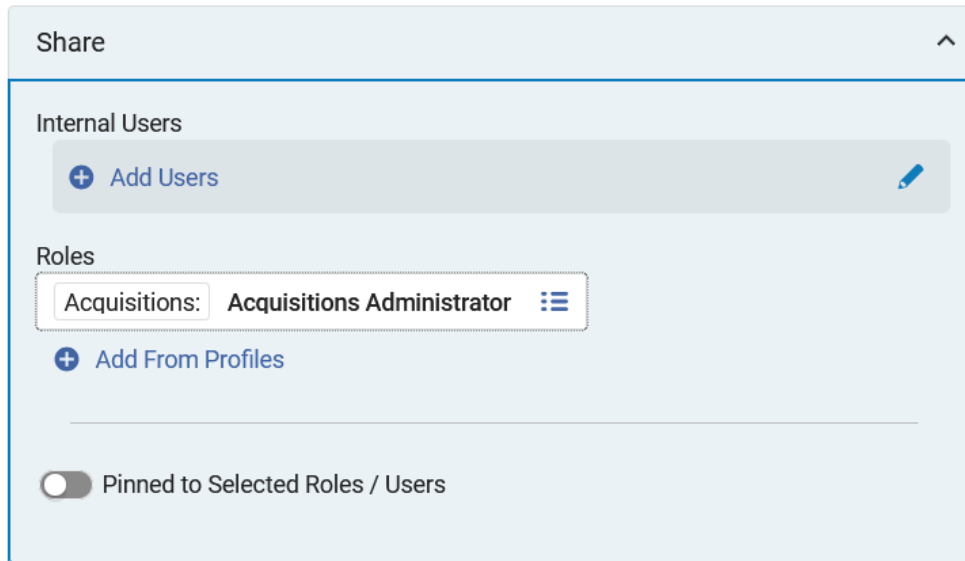
[Image Description: Enhanced Analytics Object's "Share" pane showing the role of "Acquisitions Administrator" is selected.]

- In addition to being able to more easily select the Alma user roles that you want to share an Analytics object with, it is now also possible to pin that particular Analytics object for those specific roles (or users) with whom you shared the object.

- In the previous example, the Analytics object was shared with all users who have the role of Acquisitions Administrator at this institution.
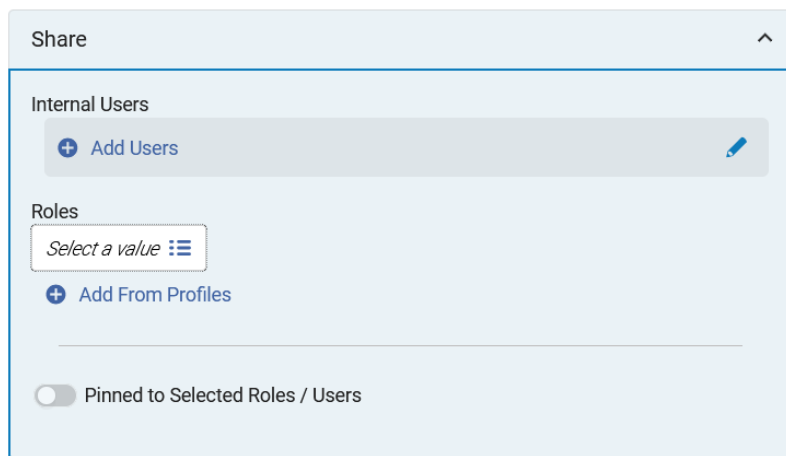
- Toggling the "Pinned to Selected Roles / Users" button will "pin" this Analytics object for all Alma users who have the Acquisitions Administrator role.

[Image Description: Enhanced Analytics Object's "Share" pane with no roles or users selected, thus the "Pinned to Selected Roles / Users" toggle is inactive.]
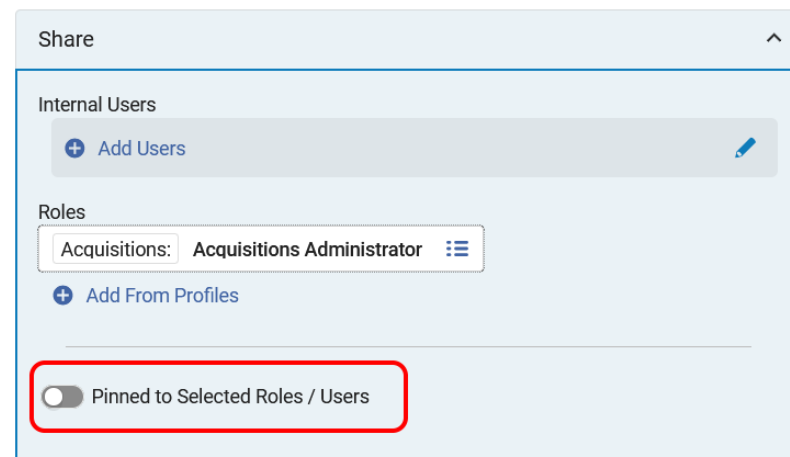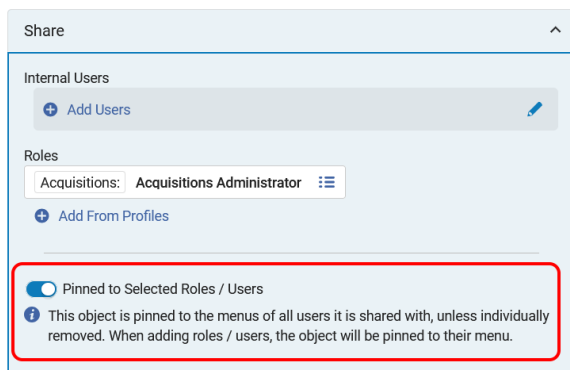
[Image Description: The "Acquisitions Administrator" role is selected. The "Pinned to Selected Roles/Users" (highlighted in a red rectangle) is now active and can be enabled.]

- In this example, toggling "Pinned to Selected Roles/Users", pins that specific Analytics Object for all users with the Acquisitions Administrator role.
  - The object is pinned to the menu of all users it is shared with, unless individually removed by that user.
  - When roles or users are added, the object will be pinned to their Analytics menu.
  - Users are able to remove pinned items that were shared by an administrator.
  - Below is an image (left) of the toggle enabled and an image (right) of the Alma Analytics Object List that shows the "Active Block Report Widget" pinned for this user by the administrator.

[Image Description: The "Acquisitions Administrator" role is selected. The "Pinned to Selected Roles / Users" toggle is enabled and is highlighted with a red rectangle.]
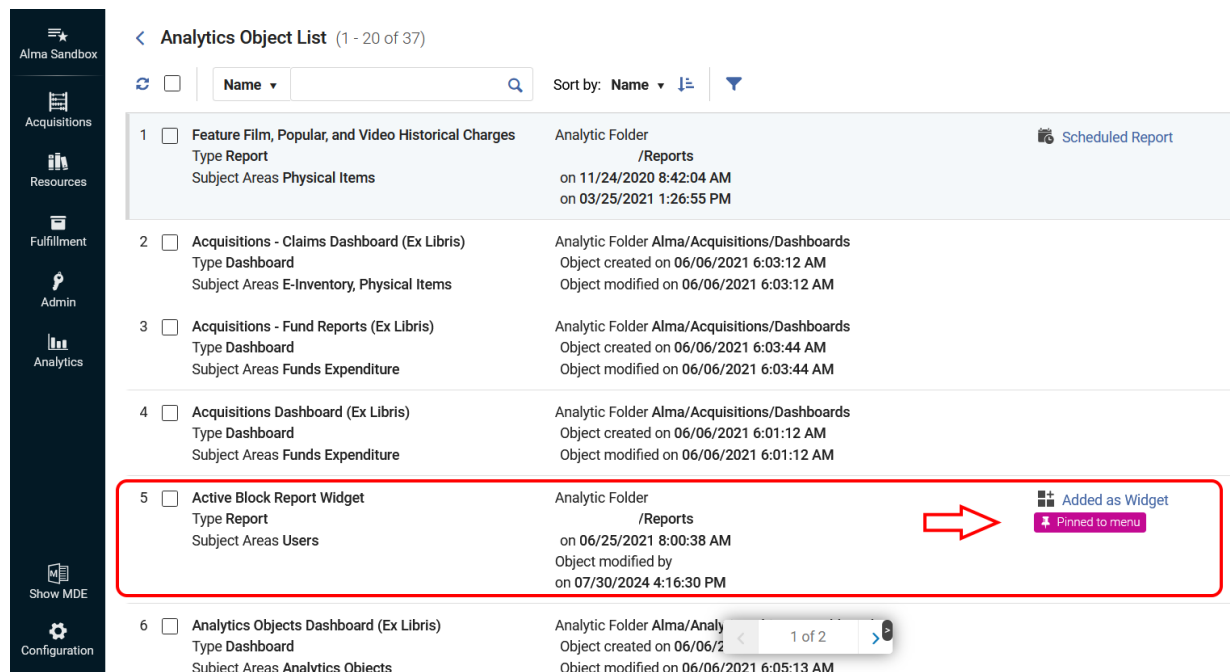
[Image Description: The "Active Block Report Widget" is highlighted with a red rectangle. A red arrow is pointing to the purple "Pinned to menu" indicator.]

- Below is an image of the Alma Analytics menu that shows the new sections for pinned objects.
    - The Analytics Object titled "Active Block Report Widget" has been pinned for this user.
    - To unpin it, you would click the small X to the far right of the Analytic object name.
    - To move the pinned object to the "My Pinned Analytics" section, click on the thumbtack icon that is found immediately to the left of the Analytic object name.
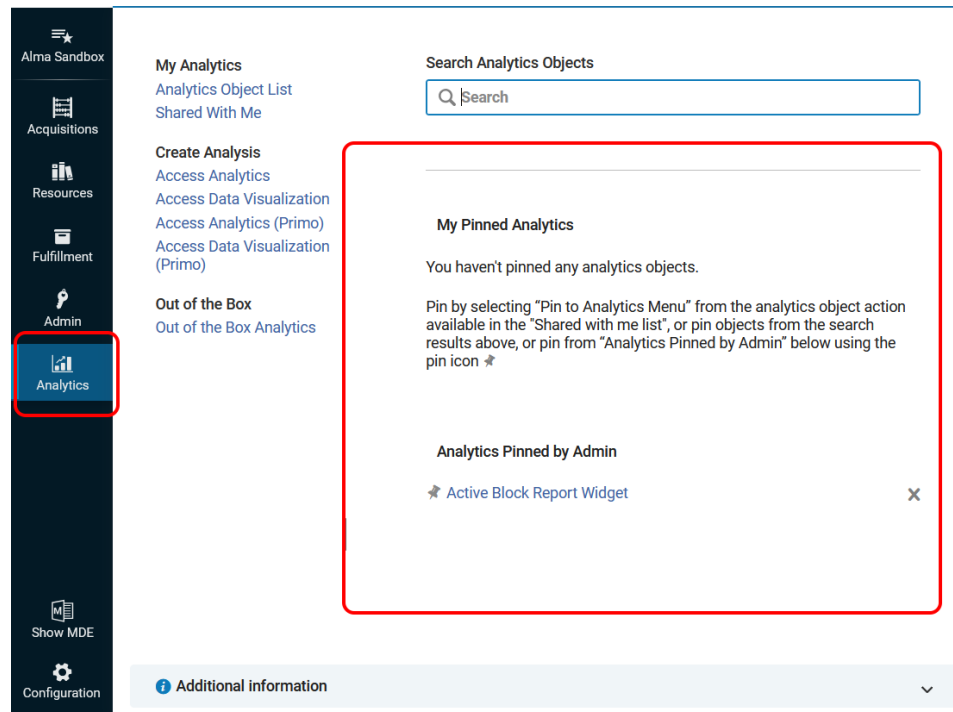
[Image Description: Alma Analytics menu with the new "My Pinned Analytics" and "Analytics pinned by Admin" sections highlighted with a red rounded rectangle.]

- IZs can now enable **Multi-Factor Authentication** (MFA) for users who sign in to Alma with a local-to-Alma login.
  - Username and password are both stored directly in Alma
  - Not for users authenticating with single sign-on systems
- Relies on the email address in the Alma user record to receive a message (Alma Letter) with a link to log in.
- Three configuration options in: Configuration Menu > User Management > General > Other Settings > mfa_for_alma_hep
  1. none - the default; means it is disabled
  2. suggest – Alma recommends MFA every time user logs in; allows the user to choose to opt in/out to MFA
  3. force – all users will be forced to use MFA and log in with a link received in email

CONSIDERATIONS BEFORE ENABLING MULTI-FACTOR AUTHENTICATION (MFA)

1. How many and what kinds of users will be affected?

    - Does not affect single sign-on
    - Will affect any Backup Administrators in your IZ
    - Will affect all CARLI Staff

2. The email address in the user record must be correct in order for the user to receive the login link.

    - PLEASE DO NOT ENABLE this setting in our shared Sandboxes

3. The email is sent by Alma Letter (*Login Using One Time Token* Letter); email configurations must be working with Alma; may wish to customize the Letter and addressFrom email address.

4. If you do decide to investigate this feature in your IZ, start with "suggest" to see how it works and coordinate with some staff for hands-on testing.

Two Primo VE Items

- Support Bulk Export of All Search Results

- Improvements to Linked Data

  - Improved display of thumbnails

  - Link to copyright information on person page

- Full Primo VE Release notes can be found at:

  https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2024/010Primo_VE_2024_Release_Notes?mon=2024 08BASE

Support Bulk Export of All Search Results

- Uses can now export all (or almost all) search results
  - Limit of 5,000 records exported from local searches
  - Limit of 10,000 records when using a blended search that includes CDI records
- User must be signed into Primo VE to use
- Export formats of Excel/CSV, RIS, or BIBTEX only
- Not supported on mobile devices
- Functionality enabled by default
  - Disable from Brief Record Display tab - clear the **Enable Export All option** check box.
- Labels may be changed. See Primo VE release notes for all label codes.

When a user is logged in and has performed a search in Primo VE, select at least one search result. The new option of "Export All Results" will appear at the top of the results list. Click on the link to display options.

[Image Description: Screen capture of Primo VE search results with new Export All Results option highlighted]

Export format
Export BibTeX

Encoding

Subject:
Item(s) sent by Ex Libris Discovery

★ To:

Note:

The number of search results exceeds the maximum number
of allowed exported records. 10,000 records will be sent to the
email address provided.
The email will be sent upon completion.

➤ SEND

CLOSE

- After clicking "Export All Results" user then chooses export format, encoding, and email address for results.
- A warning is also displayed about the maximum number of results that will be sent.

[Image Description: Screen capture of search results email options, including format, email address, and warning about records]

- Improved thumbnails

- Link to copyright information on Person page

[Image Description: Screen capture of C. S. Lewis person page from Primo VE]

For more information about the Person page, see Ex Libris documentation:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/150End_User_Help/Searching_Linked_Open_Data_-_Person_Entity#Person_Page

Questions?

[Image description: A fuchsia long stem flower grows next to a white wall.]