



*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.



CARLI

## MAY 2023 NEW FEATURES RELEASE

Alma/Primo VE Open Office Hours

May 11, 2023

# Today's Agenda

- Announcements
- Alma May 2023 Release Highlights -  
[https://knowledge.exlibrisgroup.com/Alma/Release\\_Notes/2023/Alma\\_2023\\_Release\\_Notes?mon=202305BASE](https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2023/Alma_2023_Release_Notes?mon=202305BASE)
- Primo VE May 2023 Release Highlights -  
[https://knowledge.exlibrisgroup.com/Primo/Release\\_Notes/002Primo\\_VE/2023/010Primo\\_VE\\_2023\\_Release\\_Notes?mon=202305BASE](https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2023/010Primo_VE_2023_Release_Notes?mon=202305BASE)
- Q & A

# CARLI Announcements

Do you know about CARLI's monthly newsletter?



April: <https://www.carli.illinois.edu/carli-news-april-26-2023>

CARLI Email Lists: <https://www.carli.illinois.edu/email-lists>

CARLI Calendar shows all upcoming events:  
<https://www.carli.illinois.edu/calendar>

# Alma May 2023 Release Highlights

- **Resource Sharing**

- New Layout for Borrowing Requests
- New Fields in Borrowing Requests

- **Resource Management**

- Metadata Editor
- Import Profiles
- Material Types

- **Electronic Resources**

- Collection Level Management indication
- Overlap Analysis Tool

- **Acquisitions**

- Editable lines in closed invoices

- **Analytics**

- New Interface Rollout



# Resource Sharing – New Layout for Borrowing Requests

– Now the only interface

– Features:

- Details pane
- Multiple facet selection
- Status and assignee information as facets

The screenshot displays the Alma Borrowing Requests interface. The main area shows a list of borrowing requests with columns for item details, requester information, and request status. The details pane on the right is open for the second request, 'Altered inheritance : CRISPR and the ethics of human genome editing / by Baylis, Françoise'. The details pane includes fields for Volume, Chapter title, Chapter author, Chapter number, Publication date, and Note. The interface also features a left sidebar with navigation options and a top navigation bar with search and filter options.

Item	Requester	Status
Historia de la nueva México / by Villagrá, Gaspar Pérez de, FN_University of Illinois at Urbana-Champaign	TiekRendu, NduhRie	Request sent to partner
Altered inheritance : CRISPR and the ethics of human genome editing / by Baylis, Françoise, FN_Illinois Math and Science Academy	IalcWorlmo, BmodErial	Request sent to partner
India : brief history of a civilization / by Trautmann, Thomas R., FN_Illinois State University	AtanAruge, UgesAilata	Request sent to partner
Autotheory as feminist practice in art, writing, and criticism / by Fournier, Lauren, FN_University of Illinois at Urbana-Champaign	ThazTrebo	Request sent to partner

# Resource Sharing – New Fields in Borrowing Requests

< Record customization i Apply x

### Main Columns

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

- 1  Title
- 2  Author
- 3  Partner
- 4  Status
- 5  OCLC Number
- 6  LCCN
- 7  Issue
- 8  Volume
- 9  Pages
- 10  Request note
- 11  MMS ID

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

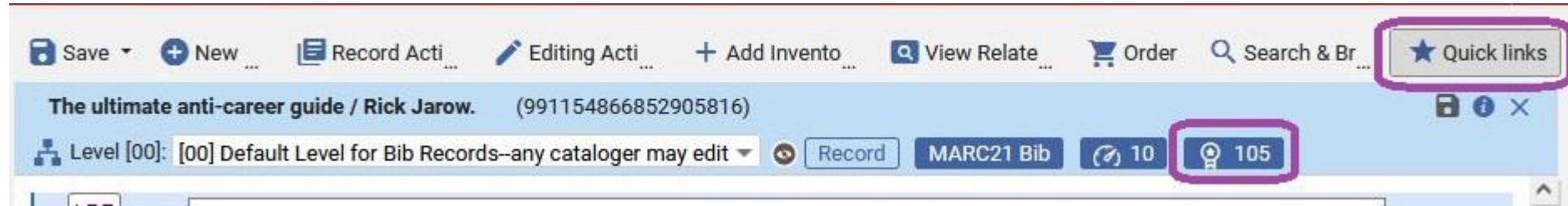
- 1  Requested Format
- 2  ISBN
- 3  ISSN
- 4  Requester
- 5  Create Date
- 6  Due Date
- 7  Loan Due Date
- 8  External Identifier
- 9  Assignee
- 10  Internal identifier
- 11  Additional info
- 12  Pickup location
- 13  Level of Service
- 14  Barcode
- 15  Date for Reply

**Badges and Icons**

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

- Labels
- Notes And Messages
- Query To Patron
- File Available
- Alerts

# Resource Management – Metadata Editor



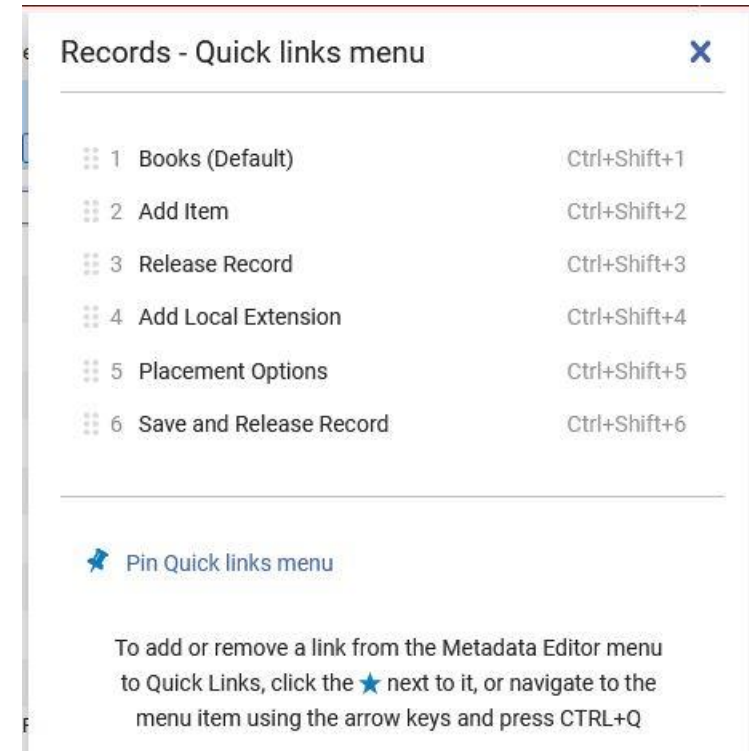
## R.I.P. Alma Classic Metadata Editor

### New Quick links Menu for MDE

- User-specific preferences
- Slides out from right
- Automatic shortcut keys

### Bibliographic Rank

- Scores record [depth and breadth](#)
- Rank is searchable





# Resource Management – Import Profiles

Import profiles: Skip validation issues

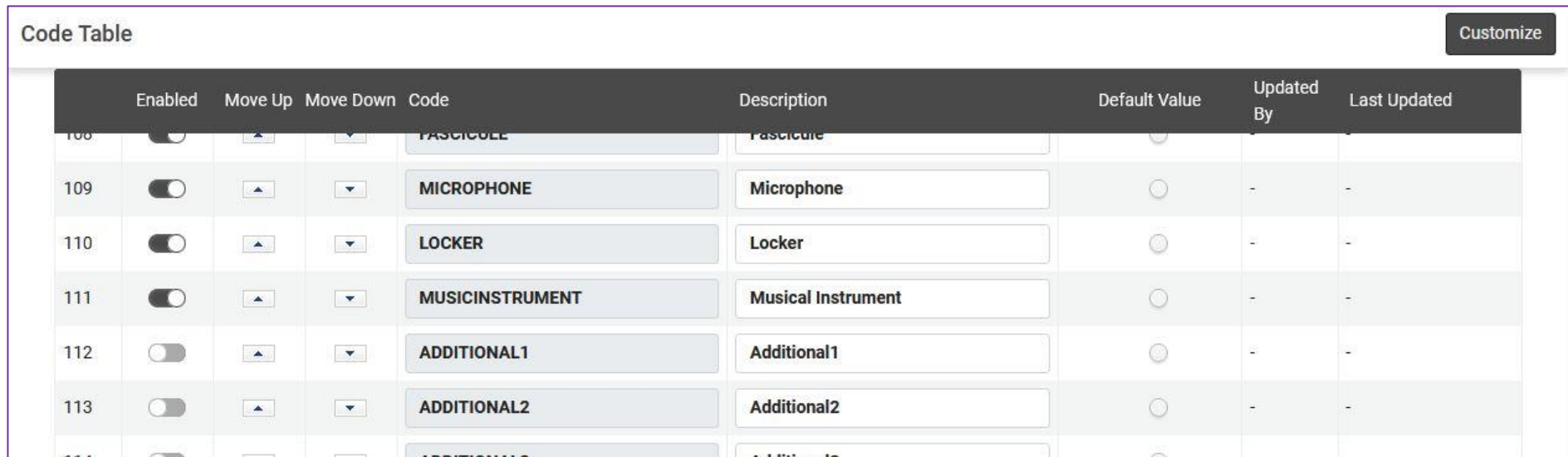
- Don't force manual handling
- Skipped records found in job report

The screenshot shows a software interface with four tabs: 'Profile Details', 'Normalization & Validation', 'Match Profile', and 'Set Management Tags'. The 'Normalization & Validation' tab is active. It contains three main sections: 'Filter', 'Normalization', and 'Validation Exception Profile'. The 'Filter' section has a dropdown menu for 'Filter out the data using' with an 'Alt + 2' tooltip. The 'Normalization' section has two dropdown menus: 'Correct the data for matching and cataloging using' and 'Change the data for PO line and inventory using'. The 'Validation Exception Profile' section has a dropdown menu for 'Handle invalid data using' set to 'MarcXML Bib Import'. Below this, there is a checkbox labeled 'Skip records with validation issues' which is highlighted with a red box. An information icon is visible next to the checkbox.

# Resource Management – Material Types

## Physical Material Types

- Config > Resources > General > Physical Material Type Descriptions
- Fixed size list of codes (ExL) and descriptions (institutions) applied to items
- Size of list increased from 107(-ish) to 127
- 15 generic types customizable to any local definition



The screenshot shows a 'Code Table' interface with a 'Customize' button in the top right corner. The table has the following columns: Enabled, Move Up, Move Down, Code, Description, Default Value, Updated By, and Last Updated. The rows are numbered 108 through 114. The 'Code' column contains values like 'FASCICOLE', 'MICROPHONE', 'LOCKER', 'MUSICINSTRUMENT', 'ADDITIONAL1', and 'ADDITIONAL2'. The 'Description' column contains corresponding descriptions like 'Fascicule', 'Microphone', 'Locker', 'Musical Instrument', 'Additional 1', and 'Additional 2'. The 'Default Value' column has radio buttons, and the 'Updated By' and 'Last Updated' columns have dashes.

Enabled	Move Up	Move Down	Code	Description	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	▲	▼	FASCICOLE	Fascicule	<input checked="" type="radio"/>	-	-
<input checked="" type="checkbox"/>	▲	▼	MICROPHONE	Microphone	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	▲	▼	LOCKER	Locker	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	▲	▼	MUSICINSTRUMENT	Musical Instrument	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	ADDITIONAL1	Additional 1	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	ADDITIONAL2	Additional 2	<input type="radio"/>	-	-
<input type="checkbox"/>	▲	▼	ADDITIONAL3	Additional 3	<input type="radio"/>	-	-

# Electronic Resources

CZUTL updates include collection level management

Community Zone Updates Task List

Review All

Submit Date Range 05/04/2023 - 05/10/2023

Collection Name

Report Type: Look-up or select

Is Free: All

- All
- Electronic Collection 'CDI full text linking' field updated
- Electronic Collection 'CDI full text rights' field updated
- Electronic Collection 'CDI search activation' field updated
- Electronic Collection 'CDI search rights' field updated
- Electronic Collection 'CDI type' field updated
- Electronic Collection 'Management Level in Community Zone' field updated

# Electronic Resources

- Alma's Overlap Analysis Tool now supports physical titles as well as electronic titles
- This allows you to load a list of titles and check if they exist in your physical or electronic inventory

(Brief Demo)



# Acquisitions – Editable lines in closed invoices

Selected fields within lines of closed invoices may now be edited.

- Handle data corrections from errors or migration surprises (especially subscriptions)
- Allows you to make invoice lines more identifiable
  - Subscription dates range
  - Additional information
  - Subscription date overlap
  - Price note
  - Note
  - Reporting Codes 1-5
- Enable/disable in Configuration
  - Configuration > Acquisitions > General > Other Settings: allow\_edit\_closed\_invoice\_line

# Analytics – New Interface Rollout

New Analytics interface rollout began in February 2023.

- “New” = *analytics-in-the-Alma-UI* for users, not designers
- Largely associated with widgets, scheduled reports, and dashboards delivered to users
- Updated schedule
  - May: new interface is optional, per user details menu > feature rollout configuration
  - August: new interface becomes institution default; may display old via user details menu
  - November: new interface becomes standard; old version is retired
- [Known issues](#) with scheduling reports between old and new interfaces

This is not a change to the Analytics interface for designing reports.



# Primo VE May 2023 Release Highlights

- Improved timeout experience
  - User receives 60 seconds warning before timeout with option to extend their session.
- Exact phrase searching
  - New “Equals exact phrase” option in Advanced Search for the Author, Title, or Subject.
- Resource type filter bar
  - New option under the basic search box allows users to narrow their search results by resource types
- Filter fines by type on My Library Card
  - New Fine Type filter in My Library Card to filter fines based on fine types: Active, All, Closed, In Dispute, and Transferred.



# Primo VE – Improved Timeout Experience

- All of these are disabled by default; **must be enabled**
  - Find under: Configuration > Discovery > Authentication > User Authentication > Authentication settings at bottom of page

Authentication Settings

Single Sign Out Upon Timeout	<input type="checkbox"/>	Enable Silent Login	<input type="checkbox"/>
Enable extending the session	<input type="checkbox"/>	Enable extending the session to maximum	<input type="checkbox"/>
Enable user setting for extending the session	<input type="checkbox"/>		



# Primo VE – Timeout Experience options

- Extend the session
  - User receives message 60 seconds before timeout, and it will allow them to extend the session for another session period.
- Extend the session to maximum
  - Timeout message, PLUS allows user to extend session to the maximum period of 7 days (this maximum not configurable).
  - This setting takes precedence if both “Extend the session” and “Extend the session to maximum” options are enabled.
- User setting for extending the session
  - Adds the **Automatically extend my session** option to the My Library Card > Personal Details and Settings tab.
  - To enable, the **display\_user\_settings** parameter must also be set to **true** in the Discovery Customer Settings mapping table (Configuration > Discovery > Other > Customer Settings).

# Primo VE – Exact Phrase Searching

## Advanced Search option changes:

- Previously, the “**Is (Exact)**” option for Author, Title, and Subject field searches returned results that included the exact phrase but might also contain other words.
- NEW: Name of the “**Is (Exact)**” option changed to “**Contains exact phrase.**” Behavior is the same.
- NEW: Users can now also choose a new “**Equals exact phrase**” option that returns results in which the specified Author, Title, or Subject field contains **only** the exact phrase.

# Primo VE – Enabling Exact Phrase Searching

- Must enable the new “**Equals exact phrase**” option in Configuration > Discovery > Display Configuration > Configure Views > Choose View > Advanced Search tab > Search Operators section (bottom of page)

Search Operators			
1 - 4 of 4			
	Active	Code	Search Profile Slots
1	<input checked="" type="checkbox"/>	Contains	ALL
2	<input checked="" type="checkbox"/>	Contains exact phrase	ALL
3	<input checked="" type="checkbox"/>	Starts with	ALL
4	<input type="checkbox"/>	Equals exact phrase	ALL

# Primo VE – Exact Phrase Searching in Primo VE

“**Equals exact phrase**” enabled for Author, Title, or Subject in Primo VE Advanced Search box:

The image shows a screenshot of the Primo VE Advanced Search interface. The search filters section is visible, with the following elements:

- Search filters**
- Author/Creator** (selected field)
- AND** (selected operator)
- Any field** (selected scope)
- + ADD A NEW LINE** (button)

A dropdown menu is open, showing the following options:

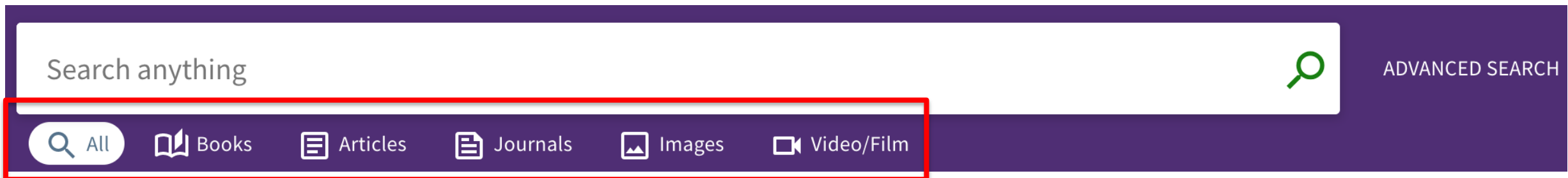
- contains
- contains exact phrase
- starts with
- equals exact phrase** (highlighted with a red box)

The search term input field is visible on the right side of the interface.

# Primo VE – Resource Type Filter Bar

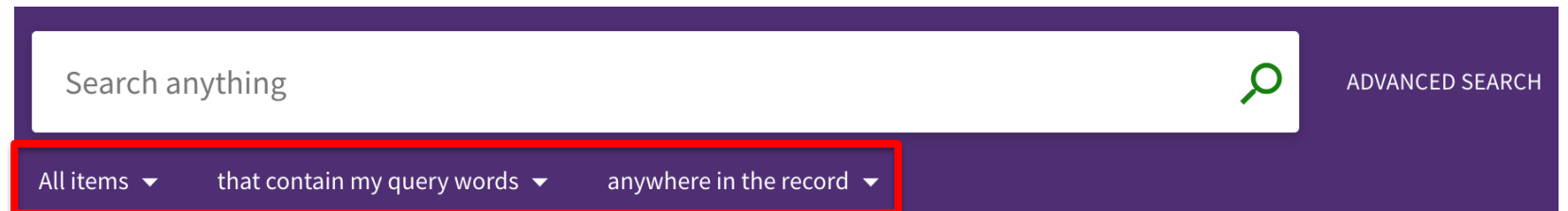
New filter bar option for Resource Types below the Simple Search Box

- Shown below with the new filter bar enabled and five resource types added.
  - The default search is for “All” resource types
- Allow user to **pre-filter** results by Resource Type
- Only the enabled resources (up to a maximum of 10 — 6 in the ribbon, then a More dropdown button) will appear for basic searches.
- Resource Types in the ribbon are **not dependent** on whether the search results **contain** items matching that resource type



# Primo VE – Resource Type Filter Bar details

- Note: Due to variances in queries and indexing, results from selecting Facet resource types **may differ** from selecting the same type with the new Resource Type Filter Bar.
- Not on by default, must be enabled.
- Note: This new filter bar **cannot be enabled** when the Basic Search pre-filter for resource types or indexes is already enabled on the Advanced Search tab of the View configuration.

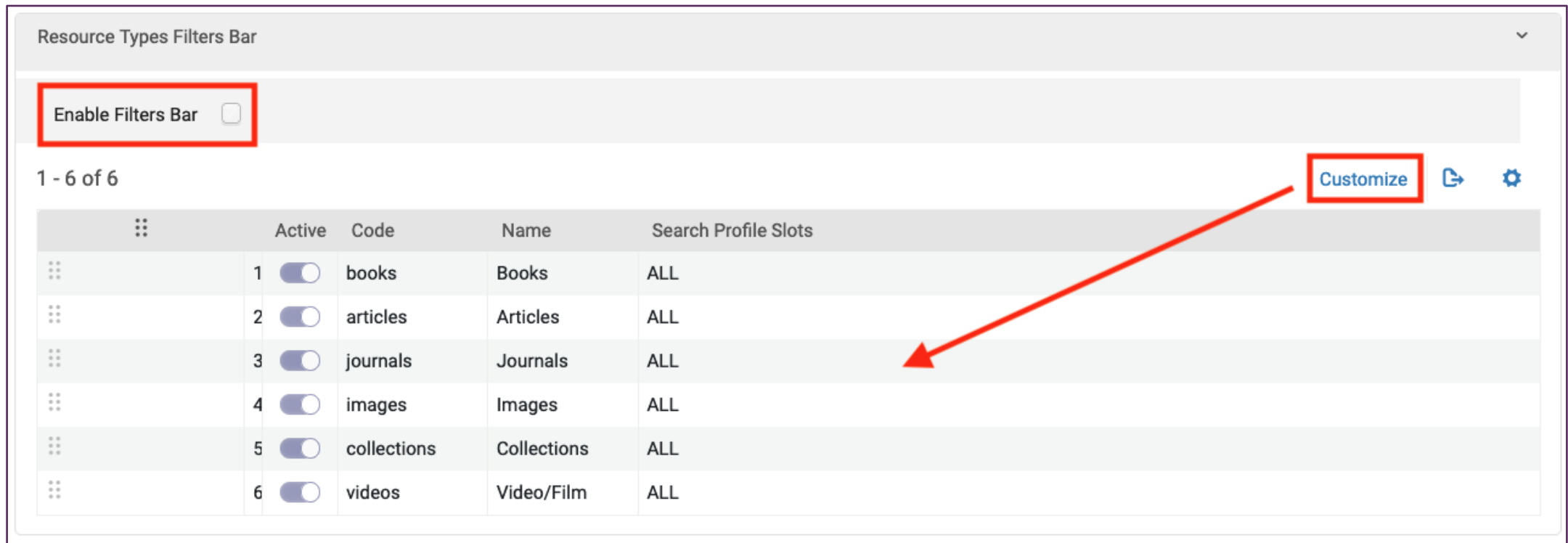


The screenshot displays the search interface with a search bar containing the text "Search anything" and a magnifying glass icon. To the right of the search bar is the text "ADVANCED SEARCH". Below the search bar is a filter bar with three dropdown menus: "All items", "that contain my query words", and "anywhere in the record". The filter bar is highlighted with a red border.

# Primo VE – Resource Type Filter Bar configuration

To enable: Configuration > Discovery > Display Configuration > Configure Views > Choose View > Brief Results tab > Resource Types Filters Bar section (bottom of page)

- Check the box to Enable; Customize to edit Resource Types in the bar





Resource Types Filters Bar

Enable Filters Bar

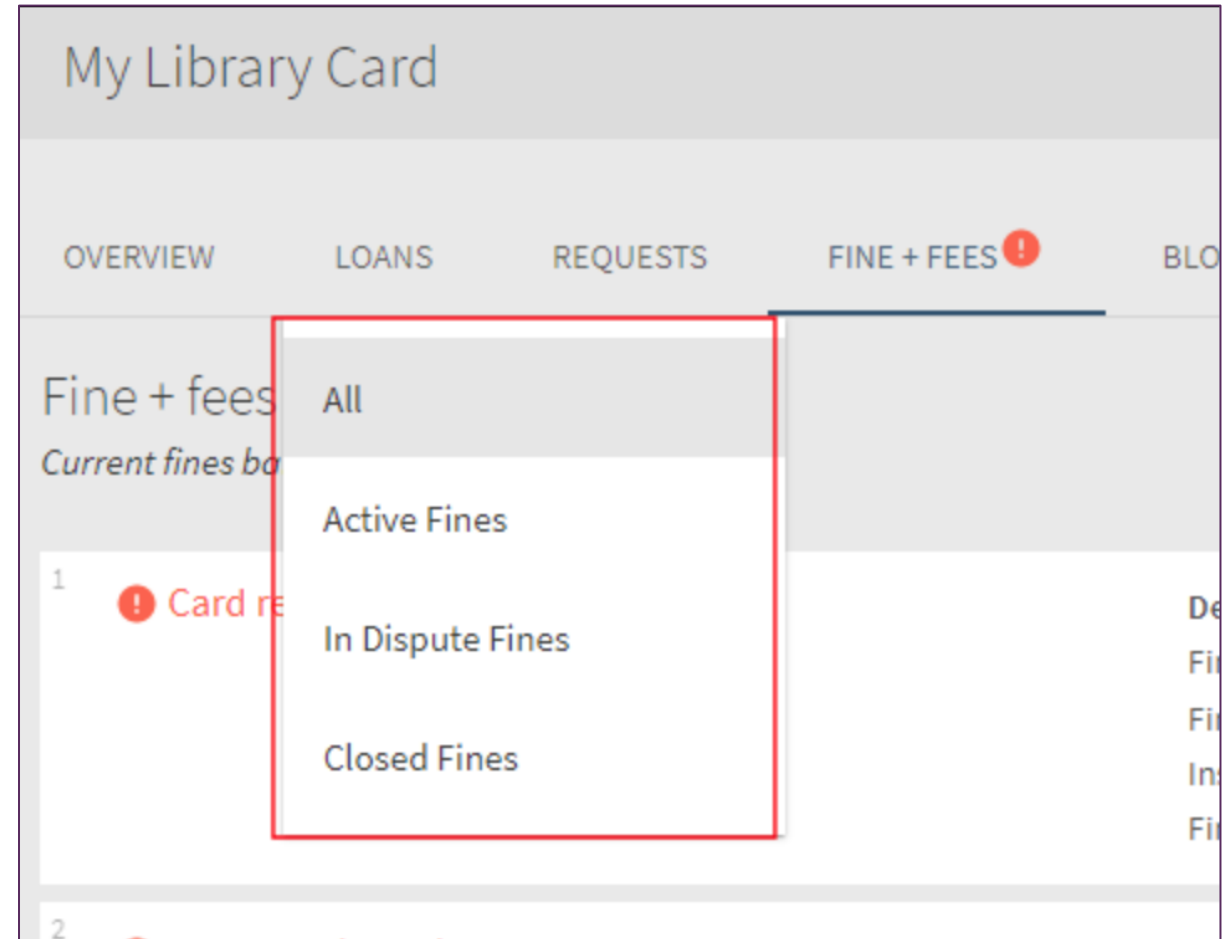
1 - 6 of 6

⋮	Active	Code	Name	Search Profile Slots
⋮	1 <input checked="" type="checkbox"/>	books	Books	ALL
⋮	2 <input checked="" type="checkbox"/>	articles	Articles	ALL
⋮	3 <input checked="" type="checkbox"/>	journals	Journals	ALL
⋮	4 <input checked="" type="checkbox"/>	images	Images	ALL
⋮	5 <input checked="" type="checkbox"/>	collections	Collections	ALL
⋮	6 <input checked="" type="checkbox"/>	videos	Video/Film	ALL

Customize  

# Primo VE – Filter Fines by Type in My Library Card

- Allows user to filter fines based on the following fine types: **Active**, **All**, **Closed**, **In Dispute**, and **Transferred**.
  - The filter does not include all possible fine types, only those that are relevant to the user's current fines and fees.
  - If there are only active fines, the Fines Type filter does not appear.
  - This is available by default; no configuration required to enable.





# Primo VE – Customization of Resource Type Mapping

Also in the May release:

- Customization of default system Resource Type definitions is now possible.
- Number of Local Resource Types increased to 50 (from 20).
- Any changes require a job to be run to recalculate the Resource Types of bibs.
- **Please do not add Local Resource Types or customize the default system Resource Types** until CARLI and the Discovery Primo VE Committee (DPVEC) have a chance to review this new information and make consortial recommendations. Thank you!
- Watch for more information soon from DPVEC about consortial Local Resource Types!

# Questions & Answers

