



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

**ALMA / PRIMO VE FEBRUARY RELEASE REVIEW
OPEN Q&A**

Alma/Primo VE Open Office Hours

February 9, 2023

Today's Agenda

- Announcements
- Highlights of February 2023 Quarterly Release
 - Alma
 - Primo VE
- Open Q & A



Premium Sandboxes (PSB) Refresh

February 2023

- Refresh will occur on February 12 as part of Alma quarterly release update
- After the refresh CARLI staff will prepare the sandboxes for use
 - Refreshing the user accounts
 - Configuring AFN between the sandbox IZs
- Watch for an announcement from CARLI once the sandboxes are ready for use again.
- If you are currently using the PSB for testing be aware that any examples you've set up will need to be recreated after the refresh.
- [More information on the PSBs](#)

Alma February 2023 Quarterly Release

Highlights

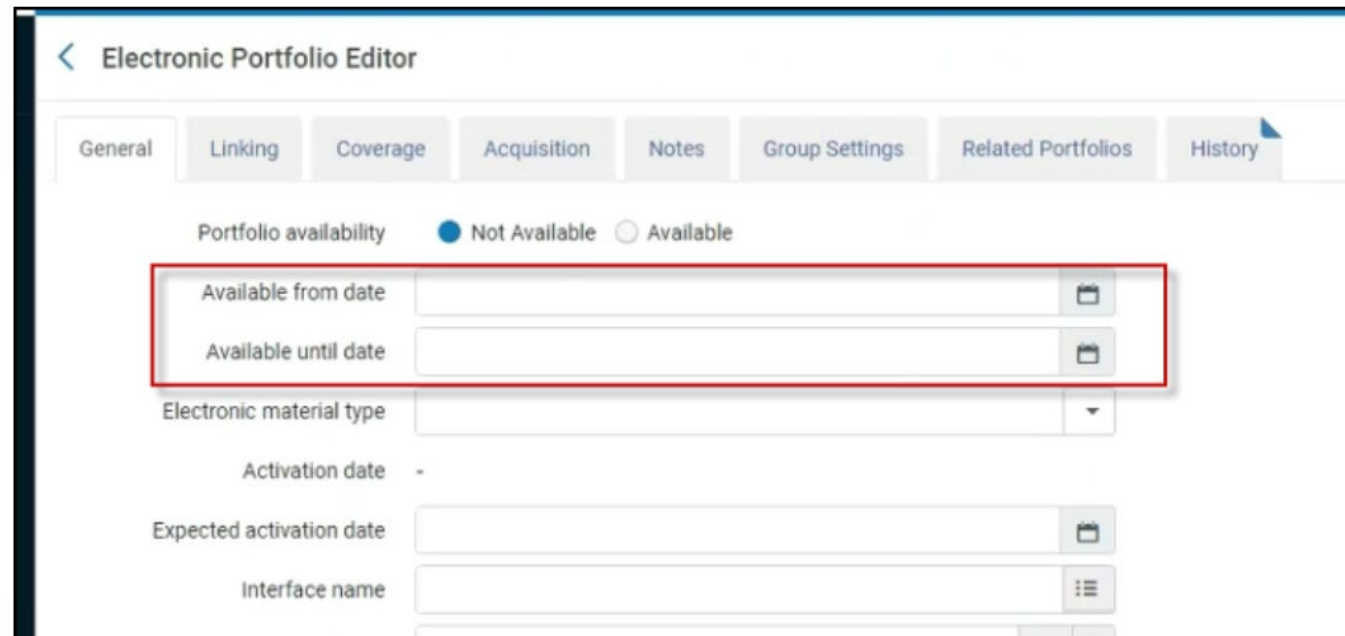
- Portfolio Availability Dates
- Metadata Editor Alt Key Shortcuts
- Analytics
- Automatic Loan Renewal Parameters
- Customize Request Cancellation Reasons
- Customize Resource Sharing Task List Options
- PDF Packaging Software Change

More information and additional enhancements are on the Ex Libris website:

https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2023/Alma_2023_Release_Notes?mon=202302BASE

Alma Update: Portfolio Availability Dates

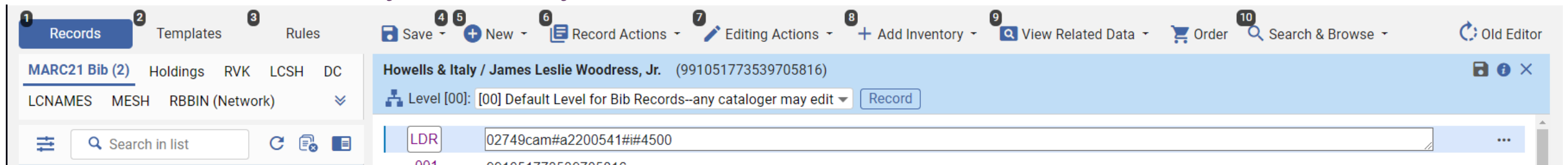
- Control the Availability of Portfolios Automatically at a Pre-defined Date
- These two fields enable users to set a date which defines:
 - When the portfolio will become "Available"
 - When the portfolio will become "Not available"
 - A date-range in which the portfolio will be "Available"



The screenshot displays the 'Electronic Portfolio Editor' interface. At the top, there is a navigation bar with tabs for 'General', 'Linking', 'Coverage', 'Acquisition', 'Notes', 'Group Settings', 'Related Portfolios', and 'History'. Below the tabs, the 'Coverage' section is active, showing 'Portfolio availability' with radio buttons for 'Not Available' (selected) and 'Available'. Two date input fields, 'Available from date' and 'Available until date', are highlighted with a red box. Below these fields are other input fields: 'Electronic material type' (a dropdown menu), 'Activation date' (a text field with a hyphen), 'Expected activation date' (a date picker), and 'Interface name' (a text field with a menu icon).

Alma Update: Metadata Editor Alt Key Shortcuts

- Alt Key Menu Keyboard Shortcuts New Metadata Editor
 - It is now possible to easily and quickly access the menus in the new Metadata Editor using a keyboard only.
 - Press Alt Key to see keyboard shortcuts in Metadata editor



- Reports on Alma-L suggest this may cause issues if you use the Alt Keys for diacritics. If this is the case at your institution a case can be filed with Ex Libris to turn off the new feature in your IZ until a fix is implemented.

Short video on new feature from ExLibris: <https://youtu.be/55N0VYvuUgs>

Analytics Objects in Alma UI

- Users may opt in from their user menu link
- Aimed at helping to better serve “analytics consumers”
- No requirement to change how you use analytics at this time.
- Ex Libris video on new feature: <https://youtu.be/sfKZ2lidd-zA>

The screenshot displays the Alma UI interface. At the top, there is a navigation bar with the ExLibris logo, search filters for 'Electronic titles' and 'Electronic Collection Name', and a user profile icon. The main content area is titled 'Feature Rollout Configuration'. It contains a list of features:

- 1 New Analytics Category Analytics
- 2 New Resource Sharing Task Lists Category Resource Sharing

The first feature is highlighted with a red box. To the right, a user menu is open for 'Schwitzer, Theodore'. The menu items include 'English', 'Change Password', 'UI preferences', 'Feature Rollout Configuration' (highlighted with a red box), and 'Sign out'.

Alma Update: Automatic Loan Renewal parameters

Two new parameters to the Automatic Loan Renewal Rules:
Locations and User Statistical Categories.

Documentation on Automatic Renewals:

- CARLI documentation: Alma- Automatic Renewals for Local Patrons
<https://www.carli.illinois.edu/alma-automatic-renewals-local-patrons>
- Ex Libris documentation:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/Configuring_Loans#Configuring_Automatic_Loan_Renewal_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/Configuring_Loans#Configuring_Automatic_Loan_Renewal_Rules)

Alma Update: Customize Request Cancellation Reasons

It is now possible to customize the descriptions for the request Cancellation Reasons.

Library staff can:

- Edit the description to be patron and staff friendly.
- Disable cancellation reasons to prevent them from displaying in staff lists; disabling does not seem to affect system-generated cancellation letters.
- Include up to 10 institution-defined cancellation reasons.

Documentation on Request Cancellation Reason configurations:

- Video from Ex Libris: <https://www.youtube.com/watch?v=kkTL5OFLRP8>
- Documentation from Ex Libris: [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/080General/Configuring_Request-Cancellation_Reasons](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/080General/Configuring_Request-Cancellation_Reasons)

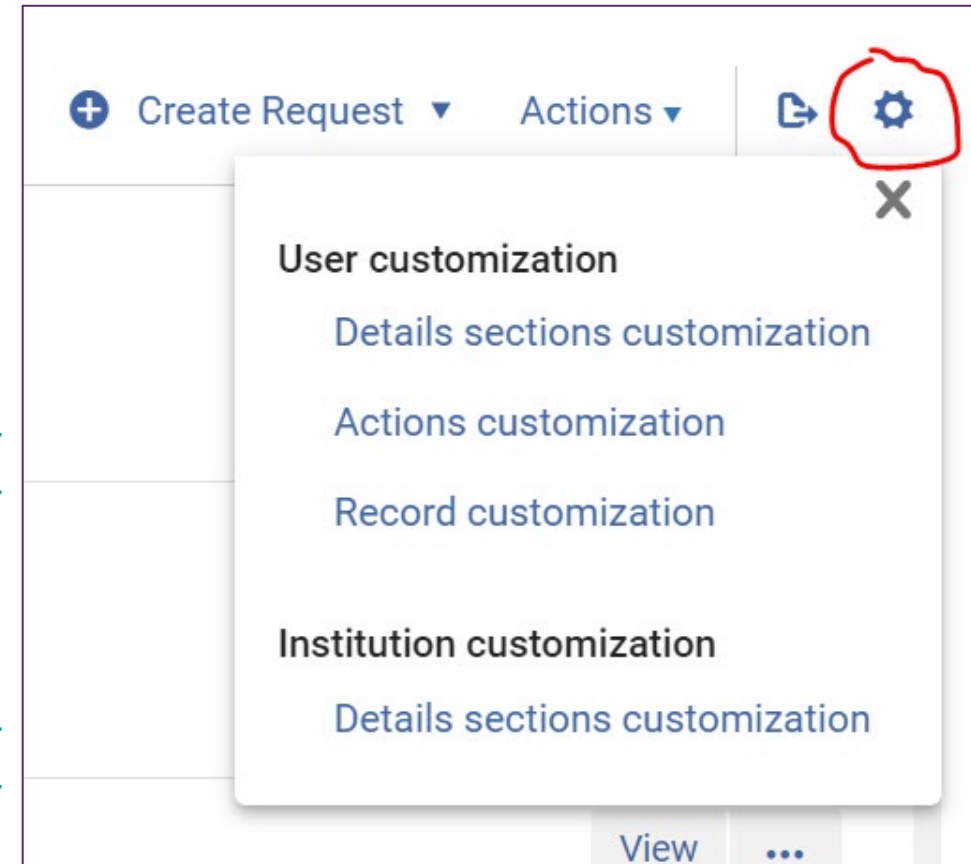
Alma Update: Customize Resource Sharing Task List Options

You can customize the resource-sharing borrowing (and lending task lists) display.

Note: User vs. Institution Customizations

Ex Libris documentation on customizations:

- Record display:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/The_Alma_User_Interface/New_Layout_2022#Customizing_the_Record_Display](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/The_Alma_User_Interface/New_Layout_2022#Customizing_the_Record_Display)
- More actions and Main Buttons options:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/The_Alma_User_Interface/New_Layout_2022#More_Actions_and_Main_Action_Buttns](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/The_Alma_User_Interface/New_Layout_2022#More_Actions_and_Main_Action_Buttns)



Alma Update: PDF packaging software change



Ex Libris made edits to PDF packaging in Alma for Alma-Digital (which we do not use), BUT, it had some collateral effects on printing in Alma.

Example:

- When selecting multiple pick-slips to print simultaneously, Alma now sends the slips to the printer as individual slips, rather than bundling them together as a multi-page PDF.

Pick Up Requested Resources (1 - 19 of 19) Print Slip Report

Select All Sort by : Call Number - Asc Print Slip Cancel

1 <input checked="" type="checkbox"/>		Talmudic thinking : language, logic, law / Jacob Neusner. Author: Neusner, Jacob, 1932- ISBN: 0872498255 (alk. paper) Imprint: Columbia, S.C. : University of South Carolina Press, c1992.	Location: Daley Library - Book Stacks Call Number: BM504.2 .N52 1992 Requests: 1	Cancel Request Mark as Missing ...
2 <input checked="" type="checkbox"/>		The Oxford illustrated history of the Reformation / edited by		Cancel Request Mark as Missing ...

Primo VE Quarterly Release

Highlights

- Search in My Favorites
- “Starts with” option for call number searches
- Barcode search option
- Set number of per-page results at top of page

More information and additional enhancements are on the Ex Libris website:

https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2023/010Primo_VE_2023_Release_Notes

Search in My Favorites

Signed-in users can now search My Favorites > Saved Records.

- The search is performed on the Title, Author, and labels fields
- Enabled by default in all Primo VE instances

The screenshot displays the 'My Favorites' interface. At the top, there are tabs for 'SAVED RECORDS', 'SAVED SEARCHES', and 'SEARCH HISTORY'. Below the tabs, there is a search bar labeled 'Search in My Favorites' with a 'SEARCH' button. A red box highlights this search bar. Below the search bar, there is a list of items. The first item is a book titled 'Pluto and Charon' by Asimov, Isaac, 1920-1992.; Hantula, Richard.; Asimov, Isaac, 1920-1992. The book cover is visible. Below the book title, there is a callout box that says 'Showing records for pluto X'. A red arrow points from the search bar to this callout box. The callout box has a white background and a grey border. The word 'pluto' is in a rounded rectangle, and there is an 'X' icon to its right.

“Starts with” Option for Call Number Searches

In advanced searches, users can now select a “Starts With” option to search for holdings call numbers.

- Disabled by default

SEARCH CRITERIA

Search for:

Library Catalog Online Access Materials Everything Articles Course_Reserve

Search filters

Holding Call Number ▼ **starts with** ▼ **2001**

Material Type

All items ▼

Language

Any language ▼

Start Date:

AND ▼ Any field ▼ contains ▼ Enter a search term

“Starts with” Option for Call Number Searches

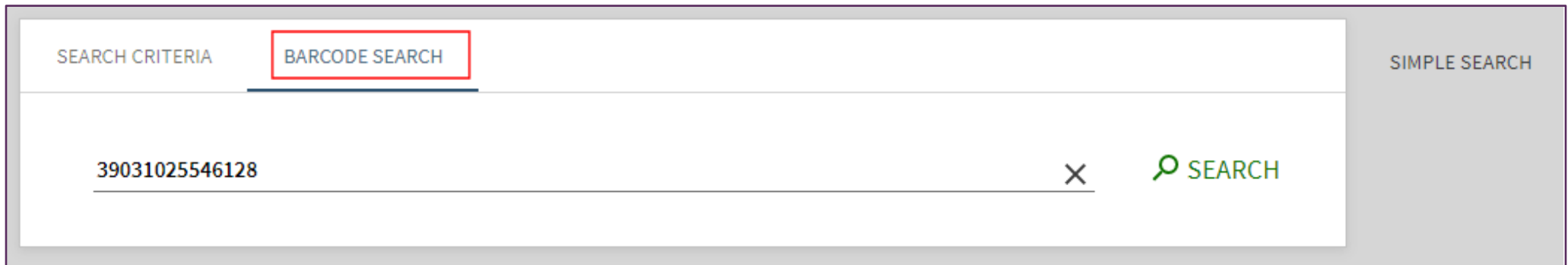
To activate:

1. Add the Holding Call Number search index to your Primo VE View's Advanced Search options
 - More information on adding the Search Index can be found here:
[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE)
2. To enable new option, go to Alma Configuration > Discovery > Other > Customer Settings and set the **allow_start_with_for_call_number** to **true**

Barcode Search

In advanced searches, users can now search by barcode via a Barcode Search tab.

- Disabled by default
- To enable:
 - Go to Alma Configuration > Discovery > Display Configuration > Configure Views. Choose the View you wish to configure and go to the General tab
 - Check the box next to **Enable Barcode Search** in the General Attributes section of the tab

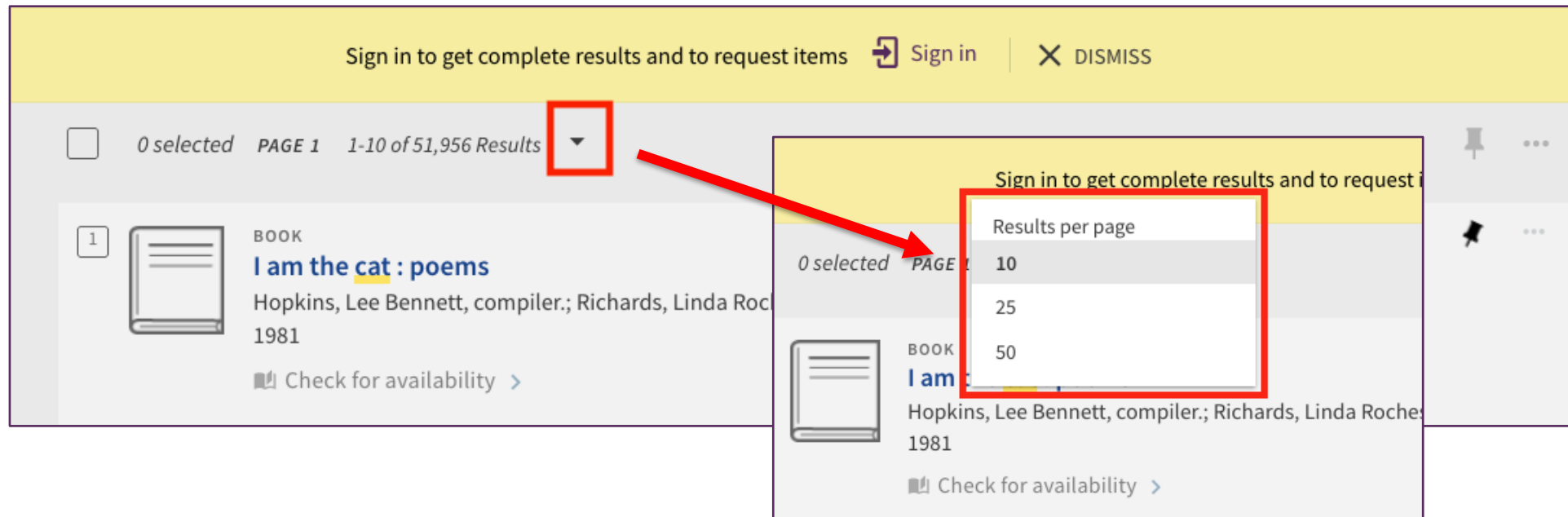


The screenshot shows a search interface with three tabs: "SEARCH CRITERIA", "BARCODE SEARCH", and "SIMPLE SEARCH". The "BARCODE SEARCH" tab is selected and highlighted with a red box. Below the tabs is a search input field containing the barcode number "39031025546128". To the right of the input field is a green magnifying glass icon followed by the word "SEARCH". A small "X" icon is located to the left of the "SEARCH" button.

Set number of page results at top of page

Users can now set the number of results per page at the top of the page instead of scrolling all the way to the bottom!

- Click the “expand” arrow next to the total results count to choose preference
- For signed-in users, the setting is saved between sessions



Content Roadmap and CDI Updates

- Alma & Primo VE have separate _content_ “coming soon” or new release notes
- [Content Roadmap-](#) collections that are planned to be released as part of the coming quarter.
- [CDI Release Notes-](#) Updates to CDI collections

Questions & Answers

