



*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.

Today's slides available at <https://www.carli.illinois.edu/carli-alma-primo-ve-open-office-hours-41>



**CARLI**

**ALMA CLOUD APPS &  
NEWSBANK ARTICLE-LEVEL-LINKING**

Alma/Primo VE Open Office Hours

June 8, 2023





# Today's Agenda

- Announcements
- Alma Cloud Apps
  - How to Find and Use Cloud Apps
  - A Few Helpful Apps
- NewsBank Article-Level-Linking
  - Brief Overview
  - Two Methods: API Webhook and GES Configuration
  - CARLI documentation
- Open Q & A





# CARLI Announcements/Upcoming Events

- Find More Illinois (FMI) - An Introduction for I-Share Members
  - Tuesday, June 27 10:00-11:00 – registration open soon
- Technical Services Q&A
  - Wednesday, June 28 10:00-11:30 – registration open
- Save the Date! CARLI Annual Meeting
  - Thursday, November 16, 2023
  - More information and registration as the date approaches.





# What are Cloud Apps?

“An open framework which allows developers to write apps which run *inside* Ex Libris higher education products such as Alma, Primo VE backoffice, Esploro, Leganto and Rapido.”

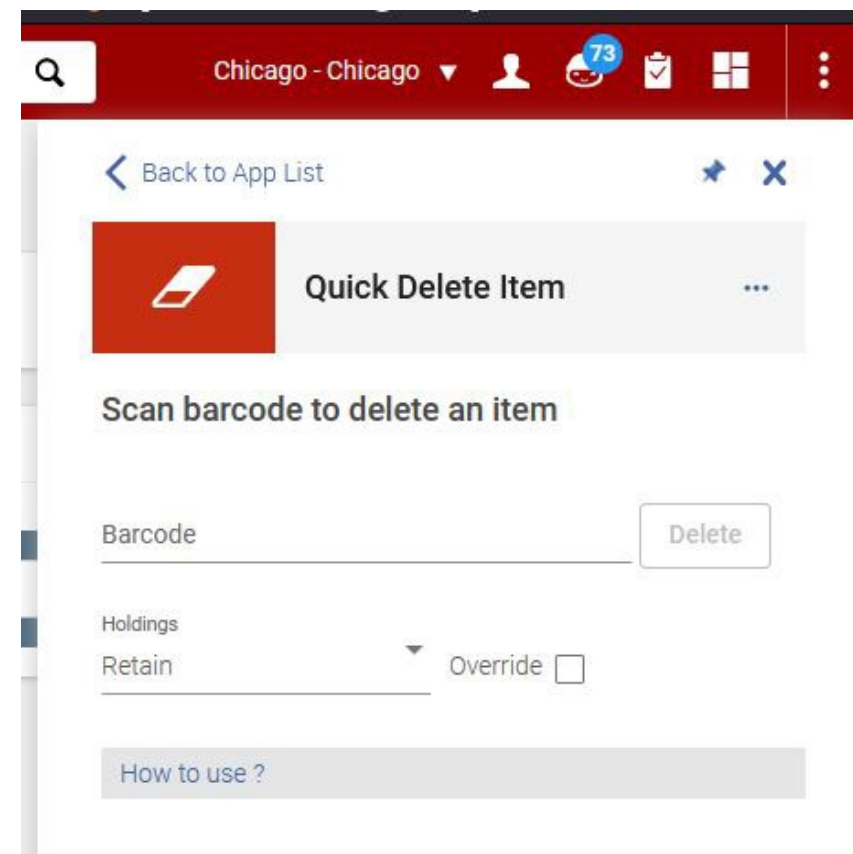
“Cloud Apps can add *new features* beyond core Ex Libris functionality, can *integrate* with other systems, or can provide *shortcuts* and *efficiencies* for institution-specific workflows.”

—Josh Weisman, Ex Libris, July 2020

<https://developers.exlibrisgroup.com/blog/announcing-ex-libris-cloud-apps/>

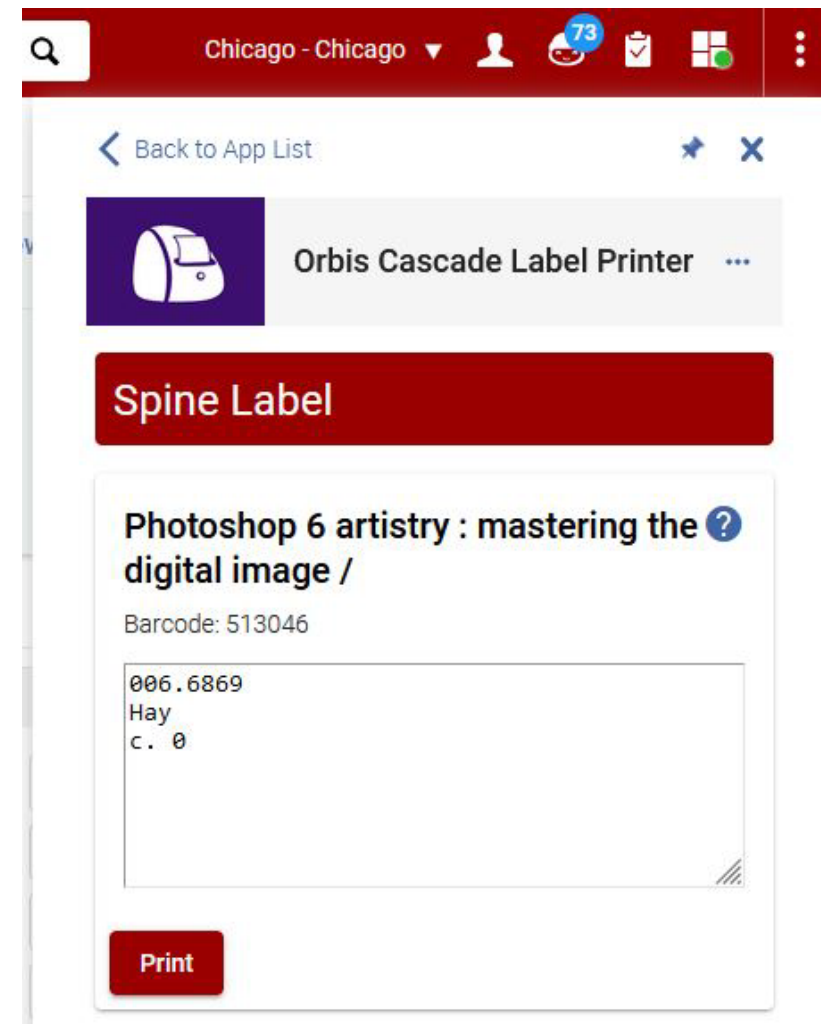


- Cloud Apps run *within* the Alma environment
  - Apps work with existing user roles and privileges
  - Accessed and run from a menu in the Alma UI
  - No additional accounts or APIs needed
- Extending functionality
  - Enhance workflows with shortcuts
  - Integrate with other systems and platforms



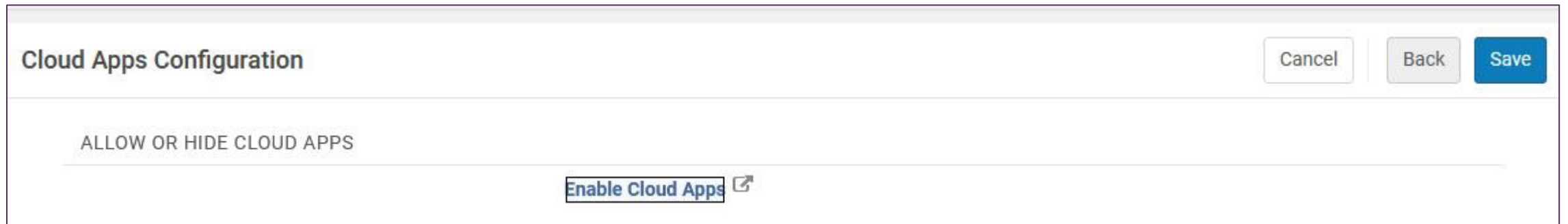


- Apps are developed by members of the Alma community
  - Vetted by Ex Libris for security, consistency
    - Ex Libris supports apps that they created
    - Individual developers support their own apps
  - Documentation provided by developer
    - Expects familiarity with normal Alma workflows
    - Identifies additional configuration options
- Library staff are responsible for the uses of any Cloud Apps
  - Research the apps and requirements before use
  - Verify before sharing use among colleagues



# Initial Configuration

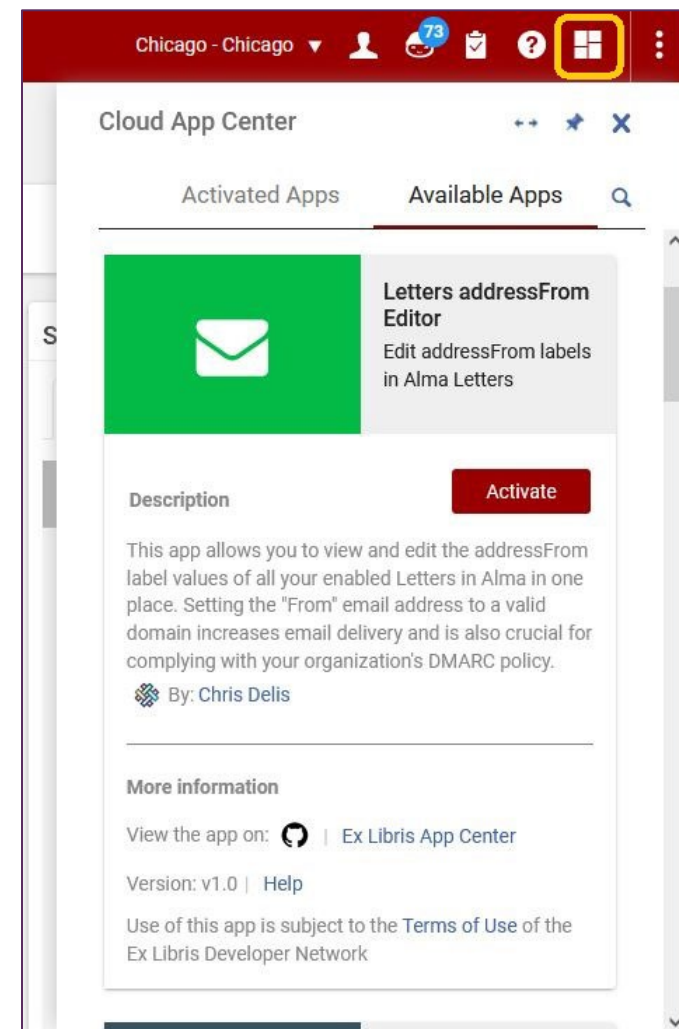
- Alma Config: General > General Configuration > Cloud Apps Configuration
  - Role needed: General System Configuration
  - Select **Enable Cloud Apps**.
  - Review and acknowledge the Cloud Apps agreement (on external site)
  - Select **Activate CloudApps for 01CARLI\_XXX**.
  - Log out of Alma.



The screenshot shows the 'Cloud Apps Configuration' page in Alma. At the top left, the title 'Cloud Apps Configuration' is displayed. On the top right, there are three buttons: 'Cancel', 'Back', and 'Save'. Below the title, there is a section labeled 'ALLOW OR HIDE CLOUD APPS'. Underneath this section, there is a button labeled 'Enable Cloud Apps' with an external link icon.



- Once enabled, any staff may select an app from the Cloud Apps menu.
- Search list of Available Apps, click the App tile for more information
  - Information tile includes links to developer details, help documentation, and source code
  - Click Activate to add to the Activated Apps list.
- Activated Apps may have additional settings
  - Settings—values that any user may change
  - Configuration—values that administrators should set



# Configuration, Continued

- Once enabled, any staff member may add a cloud app to their app menu
- Local administrators may select which apps to allow or to hide
- Best practice: research, allow selected, test, share with others

### Cloud Apps Configuration

Cancel Back Save

ALLOW OR HIDE CLOUD APPS

Enable Cloud Apps

All  Allow selected  Hide selected

Alma Refine × Cloud App Tutorials ×

Print Bib records × Role Toggler ×

HathiTrust Availability ×

Letters addressFrom Editor × Bib-Hierarchy ×

# More Information

Ex Libris YouTube channel: [Cloud Apps in Alma \(4:22\)](#)

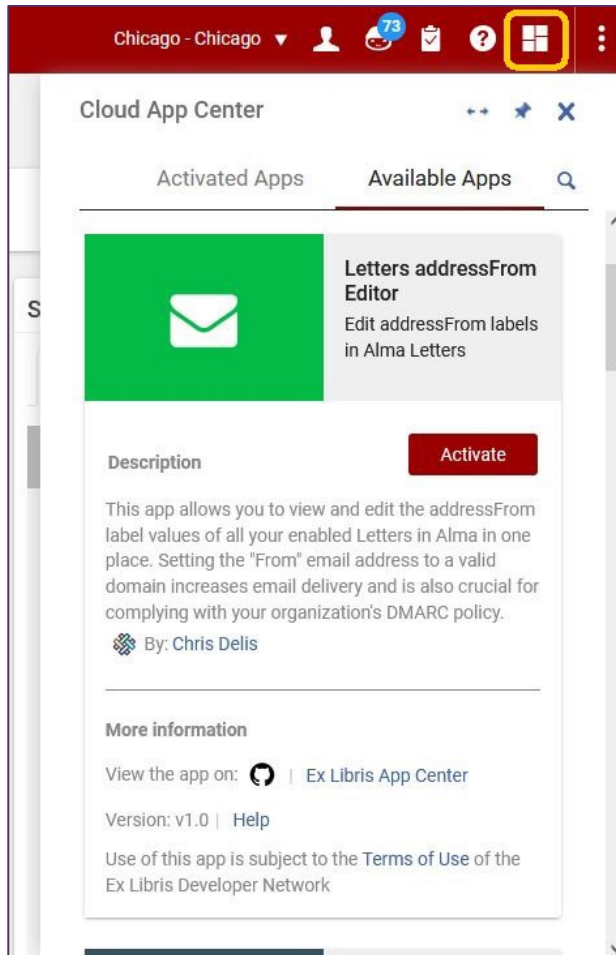
Ex Libris YouTube channel: [Getting More out of Alma with Cloud Apps \(56:15\)](#)

Ex Libris Developer Network: [Ex Libris Cloud Apps](#)

Ex Libris Knowledge Center: [Configuring Cloud Apps](#)



# Demonstration





# Questions on Cloud Apps

What are some of the Cloud Apps that CARLI libraries are using and find useful?



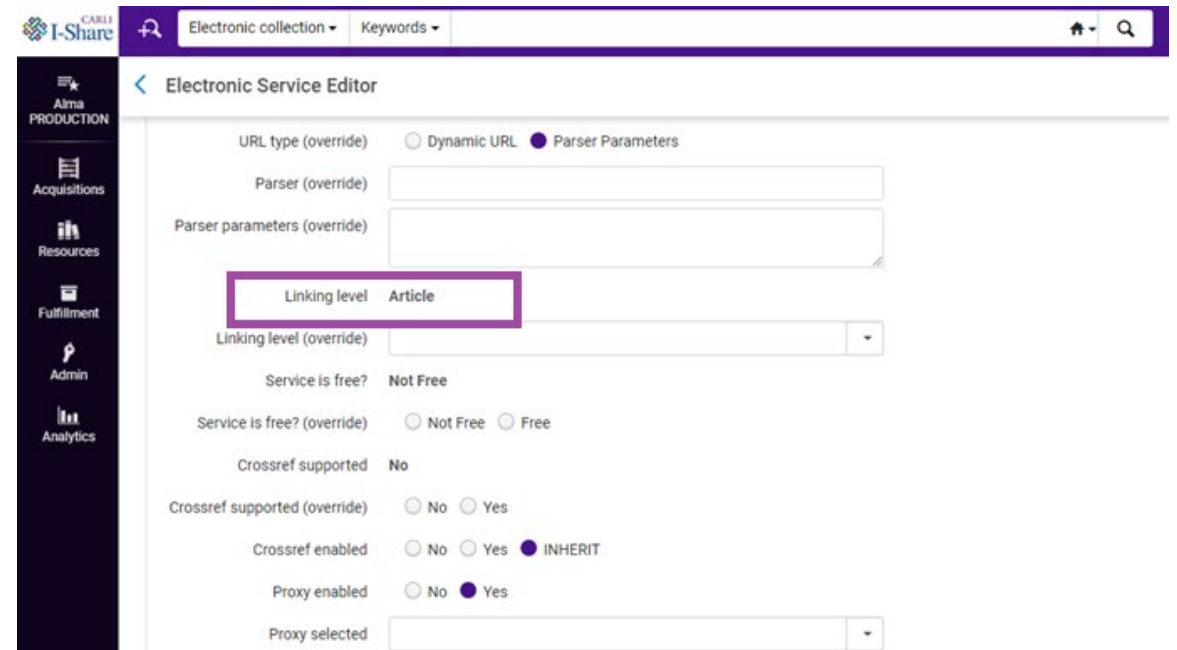
# NewsBank Article-Level-Linking – What and Why?

## What is it?

- The linking level refers to how patrons access content whether at the collection, portfolio, or article level.
- There are two methods to enabling access to articles in NewsBank.

## Why do you want article-level-linking?

- Patron time saver.
- NewsBank collection usage increase.



The screenshot displays the 'Electronic Service Editor' interface in Alma. The 'Linking level' dropdown menu is highlighted with a red box and is currently set to 'Article'. Other visible settings include:

- URL type (override):  Dynamic URL  Parser Parameters
- Parser (override): [Text input field]
- Parser parameters (override): [Text input field]
- Linking level (override): [Dropdown menu]
- Service is free?: Not Free
- Service is free? (override):  Not Free  Free
- Crossref supported: No
- Crossref supported (override):  No  Yes
- Crossref enabled:  No  Yes  INHERIT
- Proxy enabled:  No  Yes
- Proxy selected: [Dropdown menu]

Screenshot of linking level in Alma.

# NewsBank Article-Level-Linking

## Two Methods

- By API Webhook
  - Demo of Quincy University's Primo VE search profile
  - Special thanks to Katie Kraushaar and Susan Grant at QU for allowing us to share!
- By General Electronic Service (GES) configuration
  - Brief look at Knowledge Center documentation



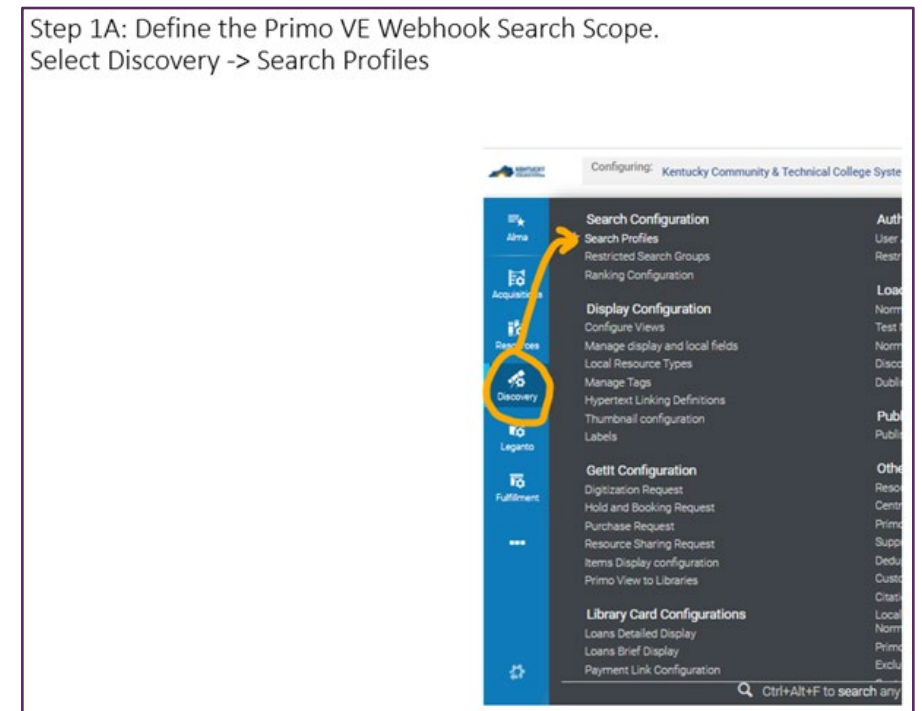
NewsBank 50 years logo from Facebook.

# NewsBank Article-Level-Linking with API Webhook

NewsBank provides a 15 slide powerpoint document

- Demonstration of Quincy University's Primo VE search profile
- Requires Discovery Administrator role

[https://i-share-quincy.primo.exlibrisgroup.com/discovery/search?vid=01CARLI\\_QCY:CARLI\\_QCY&search\\_scope=NewDiscoveryNetwork](https://i-share-quincy.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_QCY:CARLI_QCY&search_scope=NewDiscoveryNetwork)



Screenshot of NewsBank documentation.



# NewsBank Article-Level-Linking with GES Config

## General Electronic Service for NewsBank

- Knowledge Center Documentation

[https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/GES\\_for\\_Newsbank\\_Article\\_Linking](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/GES_for_Newsbank_Article_Linking)

- Requires the General System Administrator or Fulfillment Administrator role
- Requires a “Dummy GES”
- Requires configuration of DLR (Display Logic Rules)
  - Enables more specified Primo VE display options



ExLibris and Clarivate Knowledge Center logo

# NewsBank Article-Level-Linking CARLI Documentation

For the full versions of today's methods, please refer to this CARLI webpage for the documentation:

## **NewsBank Article-Level-Linking**

<https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/newsbank-article-level-linking>



Mushrooms and moss on a tree branch.

## QUESTIONS & ANSWERS

