



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/carli-alma-primo-ve-open-office-hours-43>



CARLI

I-SHARE ALMA/PRIMO VE OFFICE HOURS:
AUGUST 2023 FEATURE RELEASE

AUGUST 10, 2023

Agenda – 8/10/2023

- Announcements and Reminders
- Today's Topic: August 2023 Feature Release



Reminders

For upcoming Alma/Primo VE events and learning opportunities, see the CARLI Calendar: <https://www.carli.illinois.edu/calendar>

For the latest news in and around CARLI, see the July 26th edition of the CARLI News here: <https://www.carli.illinois.edu/carli-news-july-26-2023>



Webinars and Recordings

- Ex Libris hosts several [free webinars](#) each month!
- Most past Ex Libris Webinars can be viewed On Demand
 - [Alma webinars](#)
 - [Primo VE webinars](#)
- Most CARLI webinars and events are recorded and available from our website:
 - These [Office Hours](#)
 - CARLI [Technical Services Q&As](#)
 - CARLI [Primo VE webinars](#)
 - etc.

Sandbox update

- Sandbox Refresh will occur on **August 13**.
- An email with details about backing up your work and ceasing work on third party integrations was shared last week.

Cookies in Alma

- A “Cookie Banner” is being gradually rolled out in August and will take a few weeks to complete.

The ***OneTrust*** banner will look like this:

We use necessary cookies to make our site work. If you allow, we use optional cookies to measure our site's performance, personalize content and ads to you, and provide social media features. [Learn more](#)

[Manage cookie preferences](#)

Accept all

- Once, you accept cookies you will no longer be asked in subsequent sessions to accept them.

New Layout for the Manage Sets Page

- Ex Libris: [Managing Search Sets and Queries](#)

The screenshot displays the 'Manage Sets' interface. On the left, a sidebar contains filters for 'Type' (Itemized (4), Logical (11)), 'Content Type' (Authorities (2), All Titles (4), Courses (1), More (4)), and 'Content Origin' (Institution only (14), Community Zone (1)). The main area shows a list of sets, with the second set selected. The right panel provides details for the selected set, including its description, information, note, and related sets.

Open Metadata Editor | Customer Parameters | Manage Sets

Find specific facet

Manage Sets (1 - 15 of 15)

Create Itemized Set Create Logical Set

Refresh Name Sort by: Creation Date Scope: My Sets Status: All Delete

ID	Name	Type	Status	Created by	Created On	Time	Origin
1	ReadingListBulkUpdateJobTest12071806782	Reading lists Institution only	Active	Staff, Ex Libris	12/07/2023	18:08:50 IDT	
2	ReadingListBulkUpdateJobTest12071544070	Reading lists Institution only	Active	Staff, Ex Libris	12/07/2023	15:46:49 IDT	For chemistry RR
3	PH set	Physical holdings Institution only	Active	Staff, Ex Libris	22/06/2022	11:26:27 IDT	
4	big nli	Authorities Community Zone	Active	Staff, Ex Libris	03/05/2021	14:57:46 IDT	
5	Iceland titles	All Titles Institution only	Active	Staff, Ex Libris	13/04/2021		

Set description

Set information

Note

Related sets

ReadingListBulkUpdateJobTest12071544070

Description

Created by Staff, Ex Libris on 12/07/2023 15:46:49 IDT

Updated by Staff, Ex Libris on 16/07/2023 11:30:04 IDT

Active Private

Set information

Set content type Reading lists

Set type Itemized

Content origin Institution only

Set ID 268830560000121

Note

Internal note

For chemistry RR

Related sets

New Layout for Analytics


- Ex Libris video: [New Alma Analytics User Interface](#)
- Ex Libris documentation: [Transitioning to the Analytics New Layout](#)

The screenshot displays the Alma Analytics user interface. At the top, there is a dark blue header with the UIC University Library logo on the left, a search bar containing 'Users' and 'All', and user profile icons on the right. A vertical sidebar on the left contains navigation options: Alma Production, Acquisitions, Resources, Analytics (highlighted), and Show MDE. The main content area features a 'Search Analytics Objects' section with a search input field. Below this is a list of analysis options under the heading 'Create Analysis': 'Access Analytics' (marked with a star), 'Access Data Visualization', 'Access Analytics (Primo)', and 'Access Data Visualization (Primo)'. There is also an 'Out of the Box' section with 'Out of the Box Analytics'. An illustration of people interacting with a large screen is positioned in the center. At the bottom, there is an 'Additional information' section and a footer indicating 'Data available as of: 08/06/2023 08:53:57 CDT'.

Accrued Fines Now Appear in User Details

← User Details

Toggle Account Type
Cancel
Save



Moshe Shechter i

ID **mosheshchtr** Account Type **Internal** Identity Service **Not Used**



Record type **Public** User group **Undergraduate St...**

Manage fulfillment activities

General Information
Contact Information
Identifiers
Notes
Blocks
Fines/Fees
Demerits
Statistics
Attachments
Proxy For
Courses

History

Active balance	24.00 USD	Disputed balance	0.00 USD
Currently filtered balance	24.00 USD	Currently filtered disputed balance	0.00 USD
		Transferred balance	0.00 USD
		Accrued fines	214.00 USD

1 - 3 of 3 Title ▾ 0 rows selected Waive All Waive Selected + Add Fine or Fee  

Fine/Fee types : All ▾ Status : Active ▾ Fee Owner : All ▾

	Creation Date	Fine/Fee types	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance	
1	04/19/2023	Overdue fine	Active	04/27/2...	Date generated: 04/19/2023, Due: 04/18/2023, Fine Policy/ies: Overdue fine policy: Overdue Fine for Open hours,	Main Library	America, Russia, and the Cold War, 1945-2000 / Walter	AU44256	10.00 USD	8.00 USD	⋮

Search Citations from within a Reserves Reading List

- Ex Libris: [Managing Reading Lists](#)

The screenshot displays the Ex Libris interface for managing reading lists. At the top, there are tabs for 'Citations', 'Courses', 'Owners', 'Notes', and 'Recent Changes'. Below the tabs, the 'Citations' tab is active. A search bar is visible with the text 'Keyword' and a search icon. A dropdown menu is open below the search bar, listing various search criteria: Citation ID, Creator, ISBN, ISSN, Keyword, MMS Id, and Title. The main content area shows a list of citations. The first citation is 'ChildArt : the magazine of the International Child Art Foundation.' with MMS ID: 9930541500521. The citation status is 'Ready For Processing', the resource locate status is 'Resource Located', and the copyright status is 'Not Determined'. There are also buttons for 'Remove Citations', 'Place Request', and 'Add Citation'.

Metadata Editor updates

- New Undo action for cut/paste field, remove field
- New Browse Authority Headings
 - Resources menu > Cataloging > Browse Authority Headings
 - MDE > Search & Browse menu > Browse Authority Headings
- Update to Browse Shelf Listing – searched number is listing #3

Import Profiles updates

- New match option: match on title type (e.g., physical/electronic)

Library scope for **physical** searches

Facets «

Library Scope: **All**

Facets «

Scope Configuration ✕

Oesterle Library ↻

Oesterle Library

Resource Sharing Library

Facets «

Scope Configuration ✕

Campus Office Delivery

Milner Library

Resource Sharing Library

Storage North

Thomas Metcalf School

University High School

Order Lines Advanced Search Options

- Alert, Assigned User, Assignment, PO Line in Claim
- Creation Date, Renewal Date, Sent Date

Alma Menu Search Improvement

- Find options on main and configuration menus with “fuzzy” logic

NEW LETTERS INTERFACE

Labels Letter Examples Cancel Save

Manage in Network

XSL Save Draft Remove Draft Restore ...

```
1 <?xml version="1.0" encoding="utf-8"?>
2
3 <xsl:stylesheet version="1.0"
4 xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
5
6 <xsl:include href="header.xsl" />
7 <xsl:include href="senderReceiver.xsl" />
8 <xsl:include href="footer.xsl" />
9 <xsl:include href="style.xsl" />
10
11 <xsl:template match="/">
12 <html>
13 <head>
14 <xsl:call-template name="generalStyle" />
15 </head>
16
17 <body>
18 <xsl:attribute name="style">
19 <xsl:call-template name="bodyStyleCss" /> <!-- style.
20 </xsl:attribute>
21 <!-- header.xsl -->
22 <table cellpadding="0" cellspacing="5" border="0">
23 <xsl:attribute name="style">
24
25
26
```

XML Download Save Restore

```
1 <notification_data>
2 <display_list><overdue_and_lost_loan_notification_display><fines_fees
3 <fines_fees_list></fines_fees_list>
4 <item_loan><accession_number></accession_number>
5 <alternative_call_number></alternative_call_number>
6 <author>Miller, Judith.</author>
7 <barcode>3194040335583</barcode>
8 <booking_request_id></booking_request_id>
9 <calculated_due_date></calculated_due_date>
10 <call_number>M141 .M55 2005</call_number>
11 <create_date>04/05/2020</create_date>
12
13
14
```

Visual HTML Open in new tab

Width 513px

Preview

CARLI Testing Zone #1(LNC)

Overdue Item(s) - Notification 04/07/2020

Campbell, Jimmy	Sample Library
100 Trade Centre Drive	425 Favell Blvd
Suite 303	Glen Ellyn, 60137
Champaign IL, 61820	555-555-3364

The following items are now 21 days overdue. When an item is 35 days overdue it is automatically considered lost and a replacement fee will be charged to your library account. Please return them at your earliest convenience or contact the library.

Sample Library

Send example by email carli_admin@carli.illinois. ... Send

Labels 1 - 50 of 53 Customize All Restore All

Manage

Enabled	Code	Description	Managed in Network	Updated By	Last Updated	
<input type="checkbox"/>	by	Author		-	-	...
<input type="checkbox"/>	barcode	Barcode		-	-	...
<input type="checkbox"/>	call_number	Call Number		-	-	...
<input type="checkbox"/>	department	Circulation Department	✓	Network	06/15/2021	...
<input type="checkbox"/>	dear	Hello,	✓	Network	06/15/2021	...
<input type="checkbox"/>	description	Description		-	-	...
<input type="checkbox"/>	due_date	Due date		-	-	...
<input type="checkbox"/>	additional_info_2_type4	EMPTY_STRING	✓	Network	06/15/2021	...
<input type="checkbox"/>	additional_info_1	EMPTY_STRING		-	-	...
<input type="checkbox"/>	additional_info_1_type1	EMPTY_STRING	✓	Network	06/15/2021	...
<input type="checkbox"/>	additional_info_1_type2	EMPTY_STRING	✓	Network	06/15/2021	...
<input type="checkbox"/>	additional_info_1_type3	EMPTY_STRING	✓	Network	06/15/2021	...
<input type="checkbox"/>	additional_info_1_type4	EMPTY_STRING	✓	Network	06/15/2021	...

1 of 2

The new letters interface displays the XSL template for the letter, the XML for the letter, as well as a preview. Select Labels to see the list of labels (pictured right). For more information see [Configuring Alma Letters](#) or watch the [recent Roadmap Webinar](#) on YouTube.

Electronic Resources and Link Resolver Updates

- **Automatic Upload of Electronic Holdings** now supported for PROJECT MUSE
- More information at [AutoHoldings from vendors](#)
 - Coming in 2024 SAGE and Taylor & Francis per [Alma Content Roadmap](#)
- **More Precise Link Resolver Matching**
 - Can set to “Ignore Title Based Link Resolving”
 - New option controlled by customer to not do fuzzy match on title for electronic resources (View it) and physical resources (Get it) in Primo VE.
 - Will limit link resolver matching to standard numbers such as ISSNs, ISBNs, DOIs, PMIDs, etc.
 - Must be enabled [see instructions.](#)
 - Reduce chances of mistaken matches like this example.



BOOK

Joan of Arc: The Legend and the RealityJoan of Arc : the legend and the reality /

Gies, Frances.

Available at John T. Richardson Library Lincoln Park Course Reserves (DVD. 791.4372 J622f2004) >

Available Online >



View Online

Full text availability

Academic Video Online: Premium - United States

Academic Video Online: Premium - United States



Looks like links to an online version of this physical DVD but to an unrelated title in an Alexander Street Press e-collection.



History's Mysteries, Season 6 Episode 12, Joan of Arc: Soul on Fire

directed by Damian Weyand, fl. 1998-2006; presented by Arthur Kent, 1953-; produced by Mila Marvizon, fl. 1985, Filmroos Inc., in [History's Mysteries](#), Season 6 Episode 12 (New York, NY: A&E Television Networks, 1997), 43 mins

Primo VE - CDI

- New Option to Display Document Attributes for CDI Records - disabled by default
 - Type of CDI record can display as a flag in the brief and full displays of the CDI record. In addition, users can select these attributes as additional resource types in facets and search queries.
 - Examples from Alma test records.
 - [List of CDI Document Attributes](#)
 - [How to enable CDI document attributes](#)
- Additional Resource Types for CDI – enabled by default:
 - Magazine – A popular interest periodical
 - Magazine Article – A self-contained nonfiction prose composition
 - Questionnaire – A set of printed or written questions with a choice of answers



Primo VE August 2023 Release Highlights

- Improved performance for Browse searches
 - Improves response time but makes some changes to browse search display
- Highlight selected record in FRBR version list
 - Selected record appears above the complete list of FRBR versions
- Resource Type Filter Bar enhancement
 - Resource Filter Bar results now match facet results
- ~~Resource Recommender enhanced search capability~~
 - postponed until November
- Ability in My Library Card to enable users to choose whether or not to receive notices
 - **DO NOT ENABLE THIS OPTION**




Browse search performance

- Improves response time after selecting an entry with many results in the Browse Search List.
- Causes differences in Browse Search results:
 - Dedup/FRBR is disabled.
 - The total number of browse results does not appear.
- Enabled by default

Note: Some records are not displayed since they are restricted / suppressed from display

0 selected PAGE 1 Results 1-10 ▼ Total number of records omitted.

1  AUDIO CD
American dreams / by Velina Hasu Houston.
Houston, Velina Hasu.; L.A. Theatre Works.
Los Angeles, CA : L. A. Theatre Works; 1991
[Online access >](#)

” ✉ 📌 ...



Highlight Selected Record in FRBR Version list

- When opening list of FRBR versions for a record, the selected record is usually not the first record in the list. If enabled, the selected record will appear above the complete list of FRBR versions, starting with the preferred record.
- Disabled by default
- Configuration > Discovery > Display Configuration > Configure Views > Brief Results Tab

Dedup and FRBR

Sort FRBR Versions list by

Define FRBR display for local records Generic Preferred




Enable FRBR Enable Dedup Highlight the record you came from



Highlight Selected Record in FRBR Version list

- Example: Search “Bible” and select “The Anchor Bible.”

The screenshot shows a list of search results for the term 'Bible'. The second result, 'The Anchor Bible', is highlighted with a red rectangular box. The results are as follows:

- 1**  **MULTIPLE VERSIONS**
The Wycliffe New Testament, 1388 : an edition in modern spelling, with an introduction, the original prologues, and the Epistle to the Laodiceans
Cooper, W. R., Dr.; Tyndale Society.
[38 versions found. See all versions >](#)
- 2**  **MULTIPLE VERSIONS**
The Anchor Bible.
[60 versions found. See all versions >](#)
- 3**  **BOOK**
The new Oxford annotated Bible with the Apocrypha
Coogan, Michael David. editor.; Brettler, Marc Zvi. associate editor.; Newsom, Carol A. (Carol Ann), 1950- associate editor.; Perkins, PHEME. associate editor.
2018
[Available at Seymour Library Reference Collection \(BS191.5.A1 N48 2018\) and other locations >](#)

On the right side of the third result, there are icons for email, link, bookmark, and a menu.









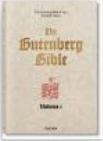







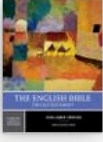





Highlight Selected Record in FRBR Version list






- Example: Version list

0 selected PAGE 1 1-10 of 60 Results ▾

1  BOOK    
The Holy Bible, containing the Old and New Testaments
c1901


2  BOOK    
The Gutenberg Bible of 1454.
Füssel, Stephan.; Clegg, Elizabeth, translator.; Gutenberg, Johann, 1397?-1468, printer.; Niedersächsische Staats- und Universitätsbibliothek Göttingen, associated name.
2018


3  BOOK    
The English Bible : King James Version.
Marks, Herbert.; Hammond, Gerald.; Busch, Austin.
c2012



4  BOOK    
Book of Bible quotations



Highlight Selected Record in FRBR Version list

- Example: Version list with “Highlight Selected Record” enabled

← BACK TO RESULTS LIST Showing list of versions




YOUR SELECTED RECORD


BOOK
The Anchor Bible.
1964-<2006>

Available at Seymour Library Main Stacks (BS192.2.A1 1964 .G3) and other locations >


0 selected PAGE 1 1-10 of 60 Results Personalize

1  BOOK
The Holy Bible, containing the Old and New Testaments
c1901

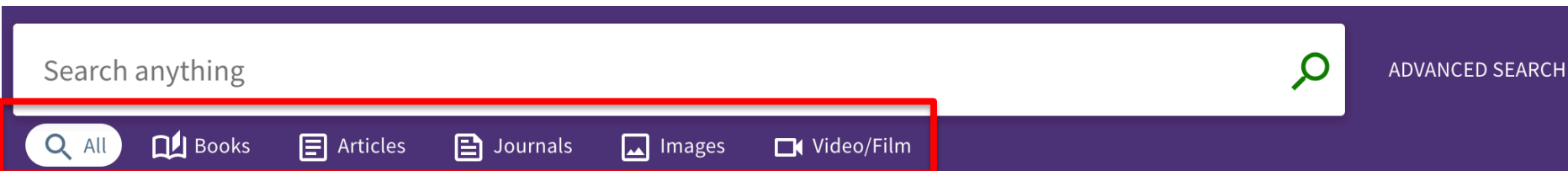
Available at Seymour Library Main Stacks (BS190.A1.1901 .N4) >

2  BOOK
The Gutenberg Bible of 1454.
Füssel, Stephan.; Clegg, Elizabeth, translator.; Gutenberg, Johann, 1397?-1468, printer.; Niedersächsische Staats- und Universitätsbibliothek Göttingen, associated name.
2018

Check holdings Special Collections and Archives SCA Oversized. This item is non-circulating. You may ask to view it in the Special Collections & Archives in Seymour Library. >

3  BOOK
The English Bible: King James Version

Resource Type Filter Bar Update



- Resource Type Filter Bar introduced in May 2023 feature release
 - More information can be found here:
[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Resource_Type_Filter_Bar](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE#Configuring_the_Resource_Type_Filter_Bar)
- New in August: Search results when using the Resource Type Filter Bar are now the same as selecting the same resource type in the facets/refine your results section of brief results.



Resource Recommender Updates

- More about Resource Recommender:
[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/120Other_Configurations/010Resource_Recommender_for_Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/010Resource_Recommender_for_Primo_VE)
 - ~~New enhancements added so that the search query does not have to exactly match the searchable tag to display matching recommendations:~~
 - ~~Synonyms~~
 - ~~Inflections~~
 - ~~Stop words~~
 - ~~Wording order~~
- Ex Libris removed this new feature from the August update. Watch for an improved version in November!

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

Personal details
Patron group: Staff

[EDIT DETAILS](#)

Valid From:
2023/07/16

My email:
nosuchmail@no.such.mail.com

Additional Email Addresses:

User Roles:
Circulation Desk Operator
Biology Library

<input checked="" type="checkbox"/> Activity Report	<input checked="" type="checkbox"/> Courtesy letter
<input checked="" type="checkbox"/> Overdue Notice	<input checked="" type="checkbox"/> Loan Status letter
<input checked="" type="checkbox"/> Recall letter	<input checked="" type="checkbox"/> Recall Cancellation letter

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



Questions?





**Join us September 14 at
2pm for another
Office Hour.**

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

