CARLI I-Share

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

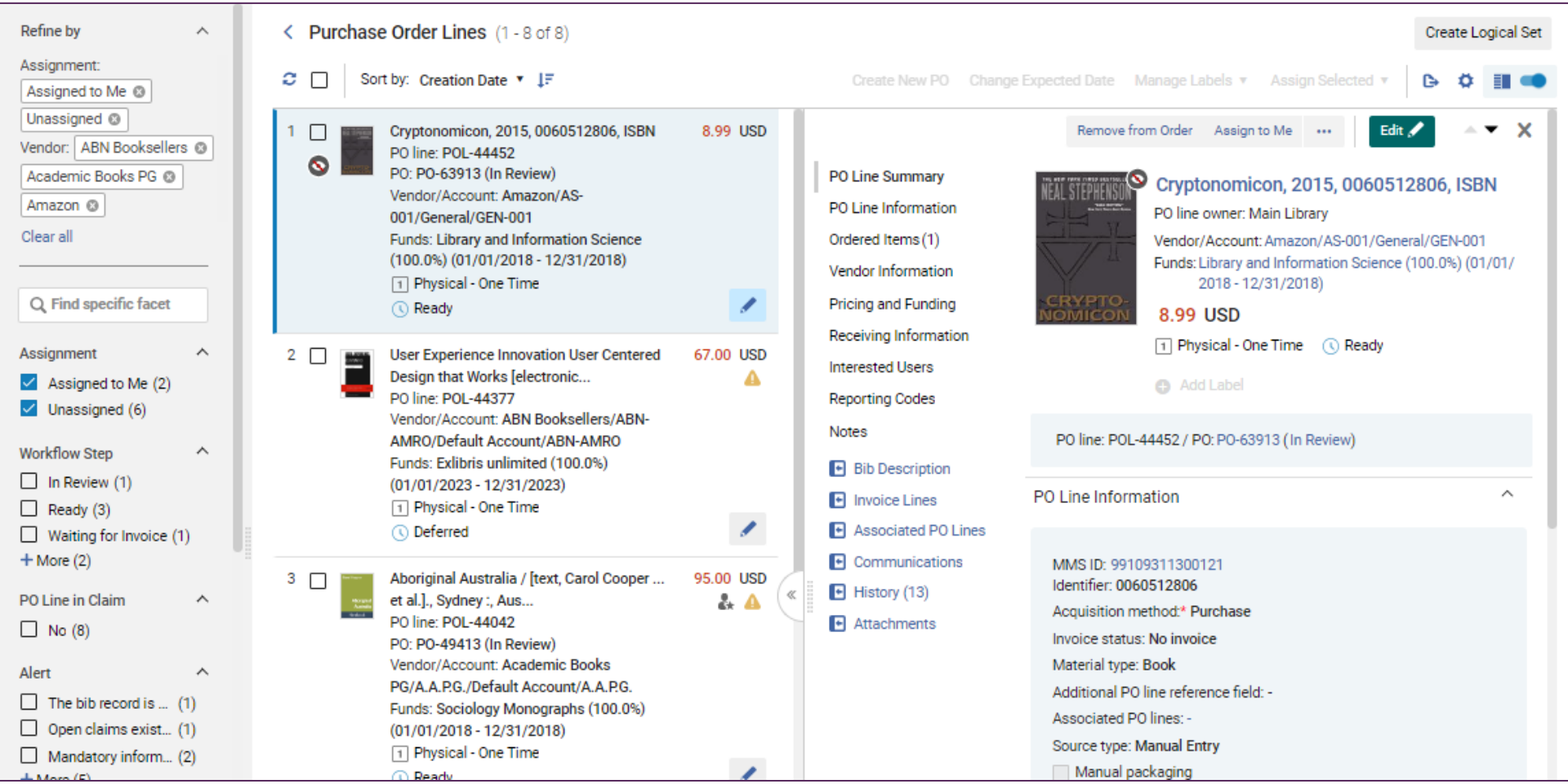
- A “Cookie Banner” is being gradually rolled out in August and will take a few weeks to complete.

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

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

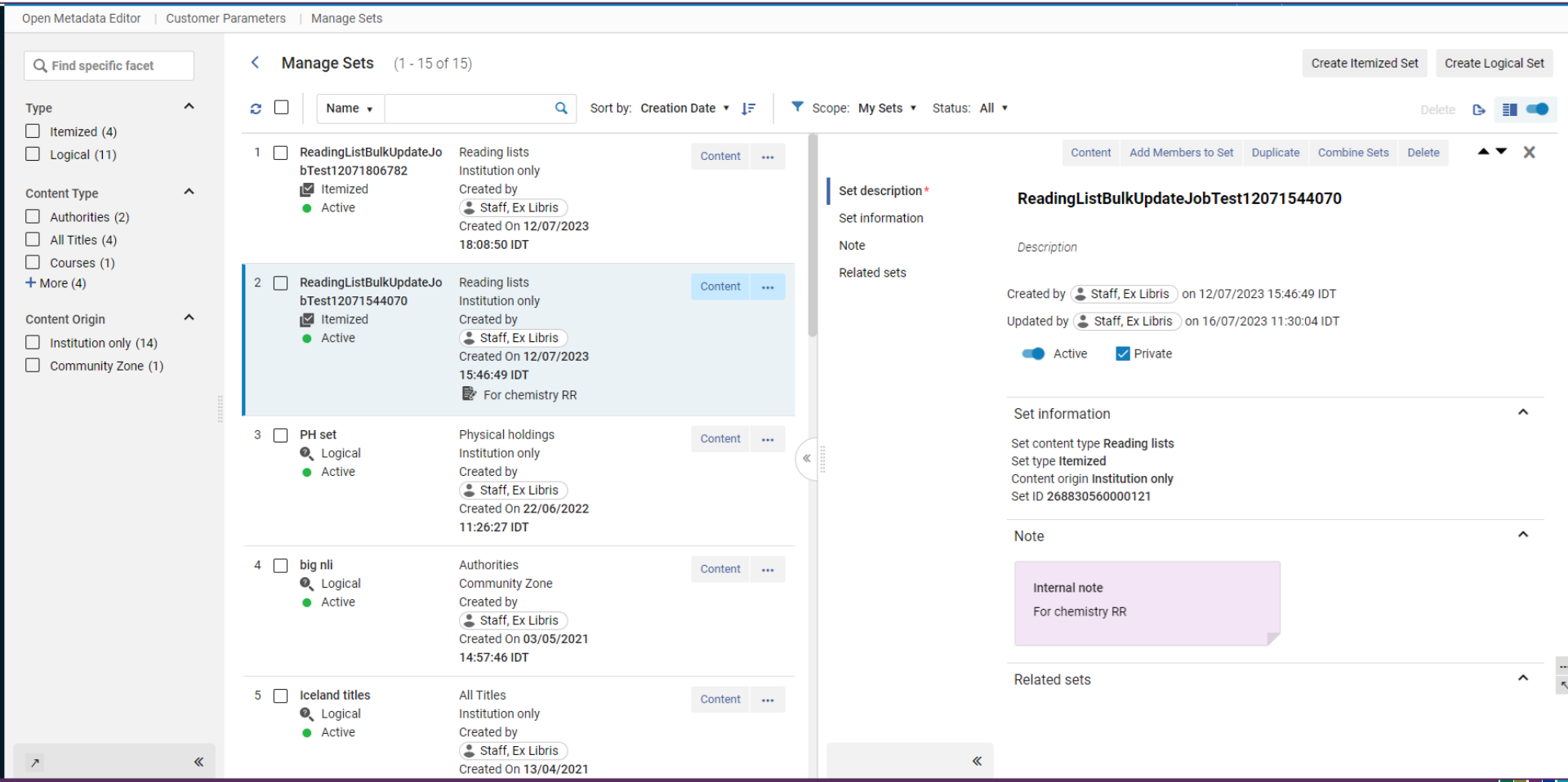
New Layout for the PO Lines Task List

- Ex Libris: Overview Video of New Layout
- Ex Libris: Opting in or out to a New Feature



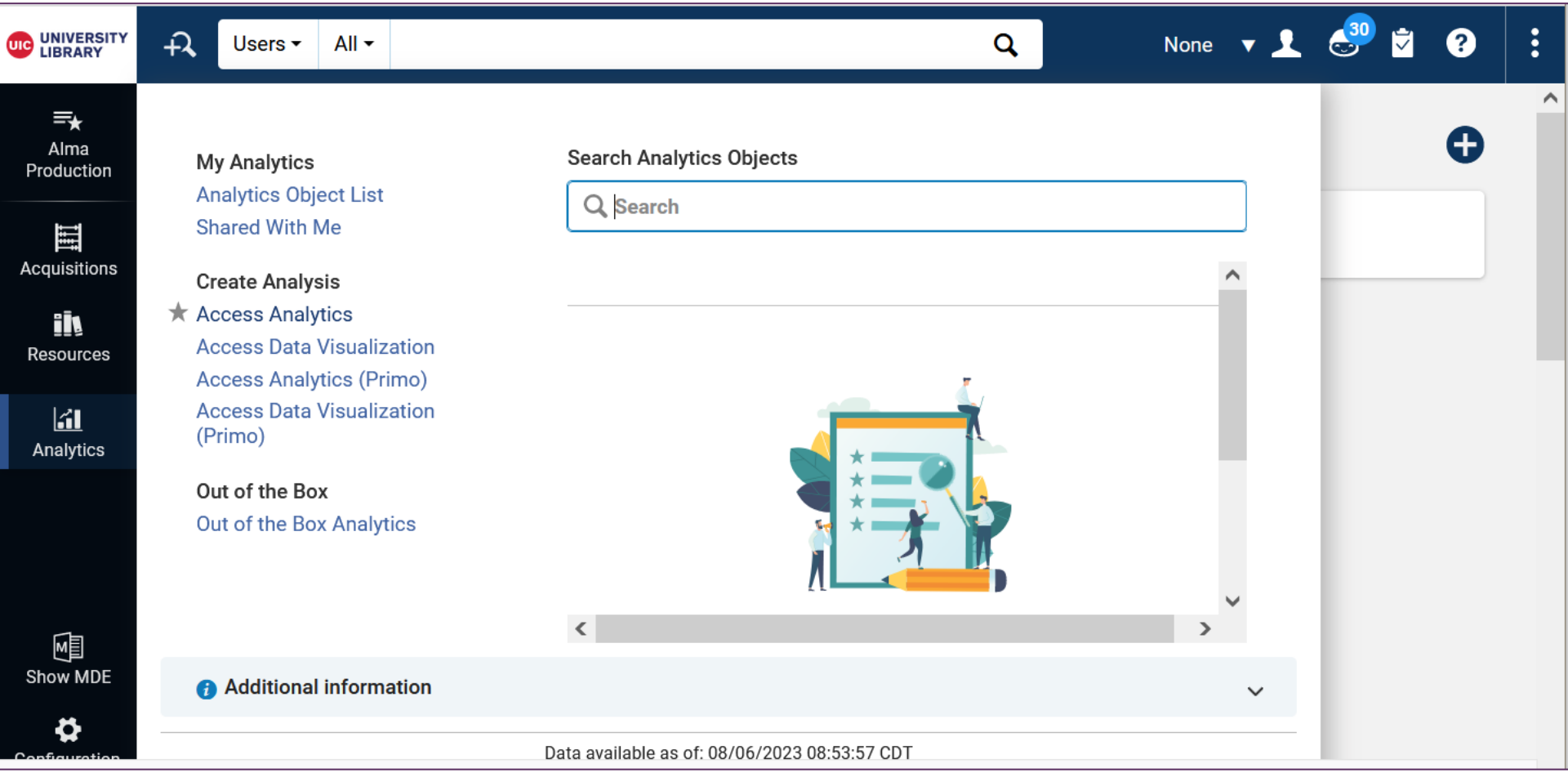
New Layout for the Manage Sets Page

- Ex Libris: Managing Search Sets and Queries

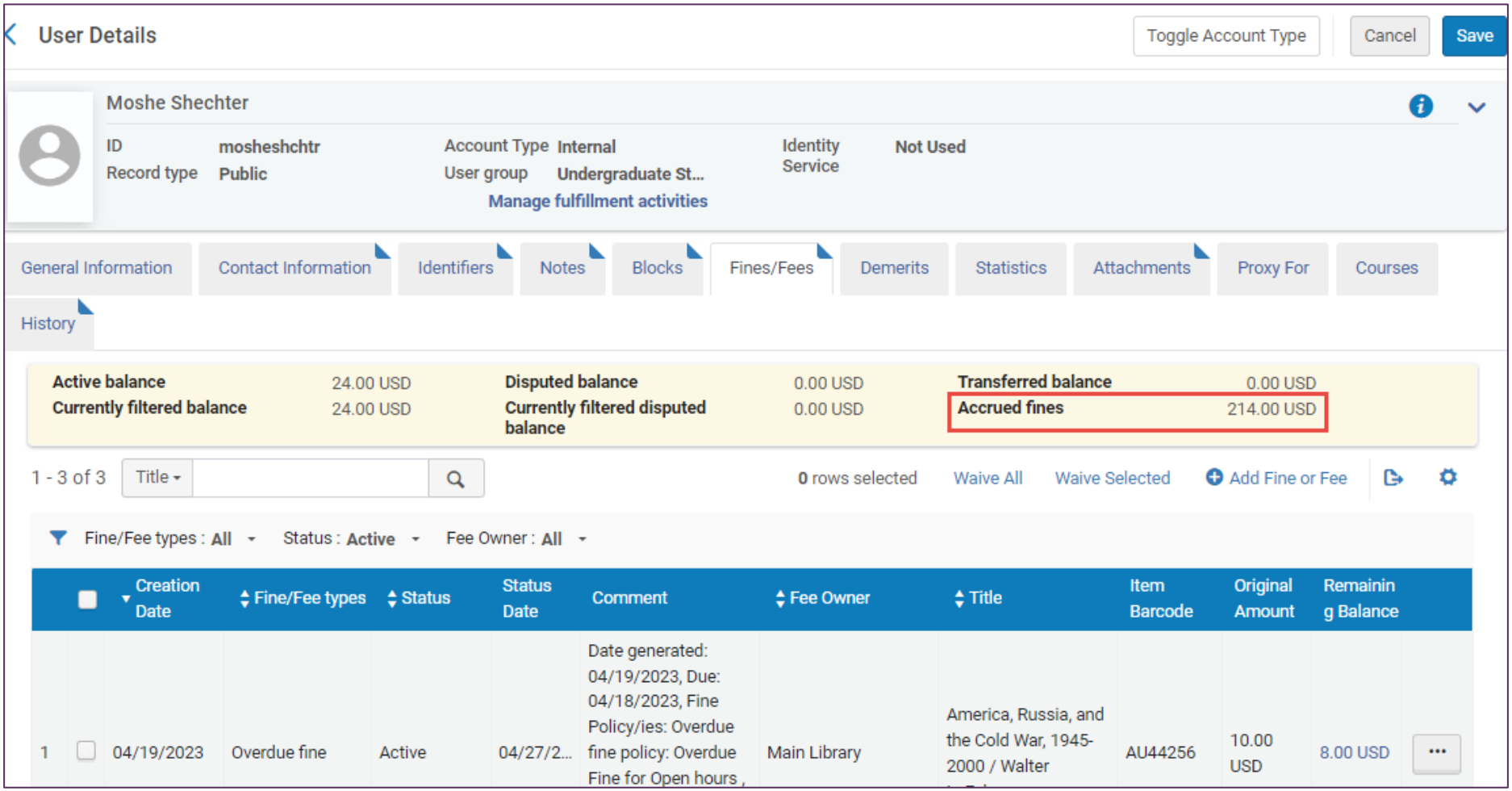


New Layout for Analytics

- Ex Libris video: New Alma Analytics User Interface
- Ex Libris documentation: Transitioning to the Analytics New Layout

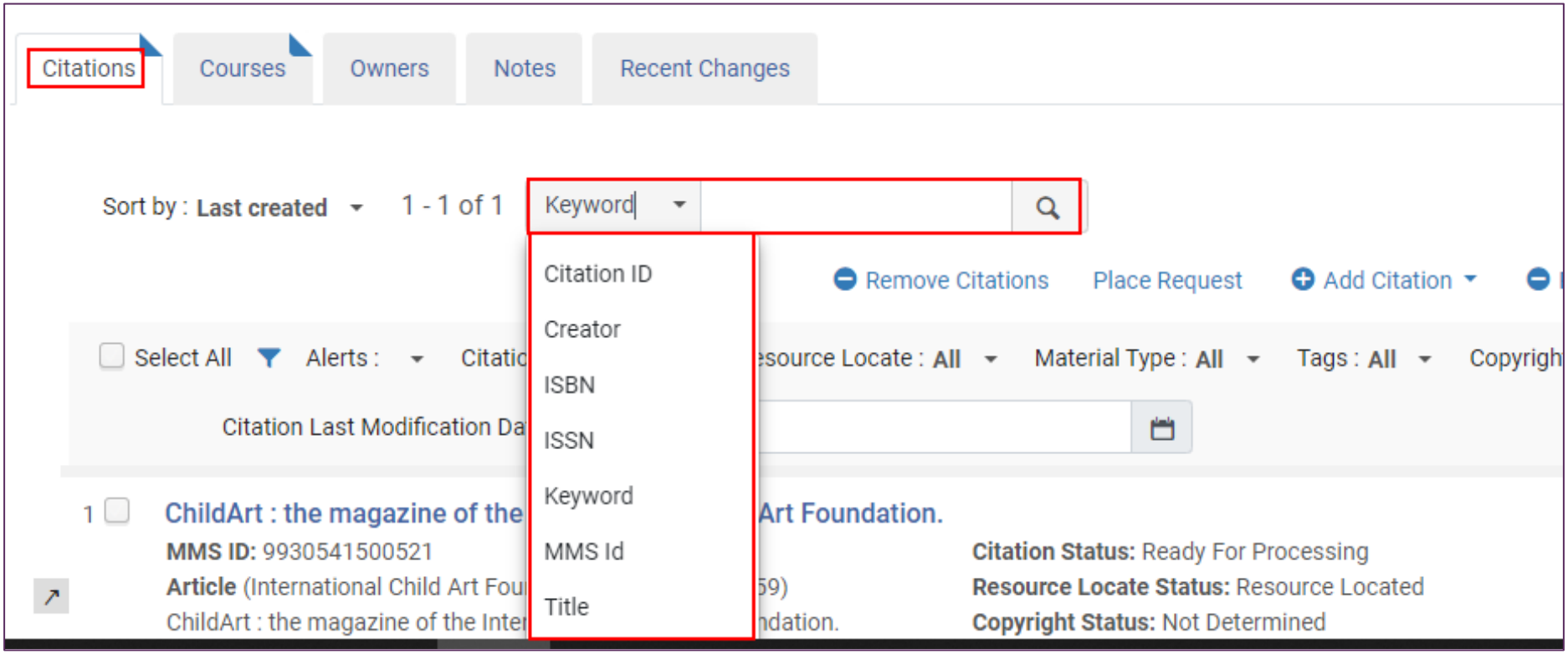


Accrued Fines Now Appear in User Details



Search Citations from within a Reserves Reading List

- Ex Libris: Managing Reading Lists



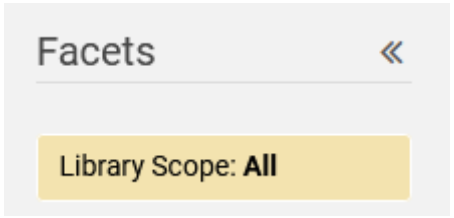
Metadata Editor updates

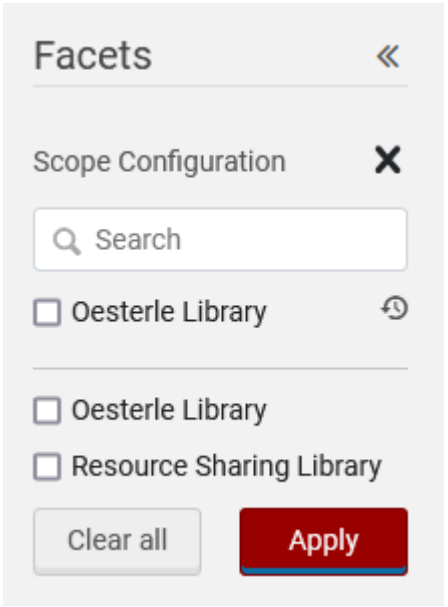
- New Undo action for cut/paste field, remove field
- New Browse Authority Headings
  - Resources menu > Cataloging > Browse Authority Headings
  - MDE > Search & Browse menu > Browse Authority Headings
- Update to Browse Shelf Listing – searched number is listing #3

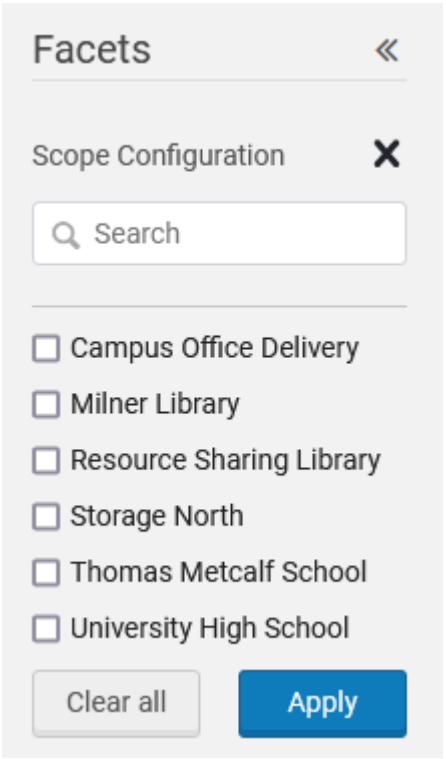
Import Profiles updates

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

Library scope for **physical** searches







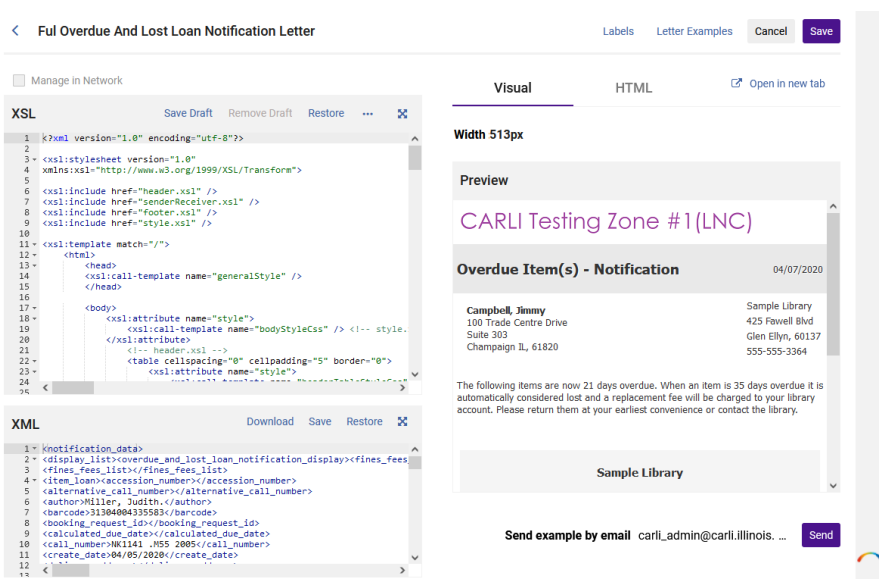
Order Lines Advanced Search Options

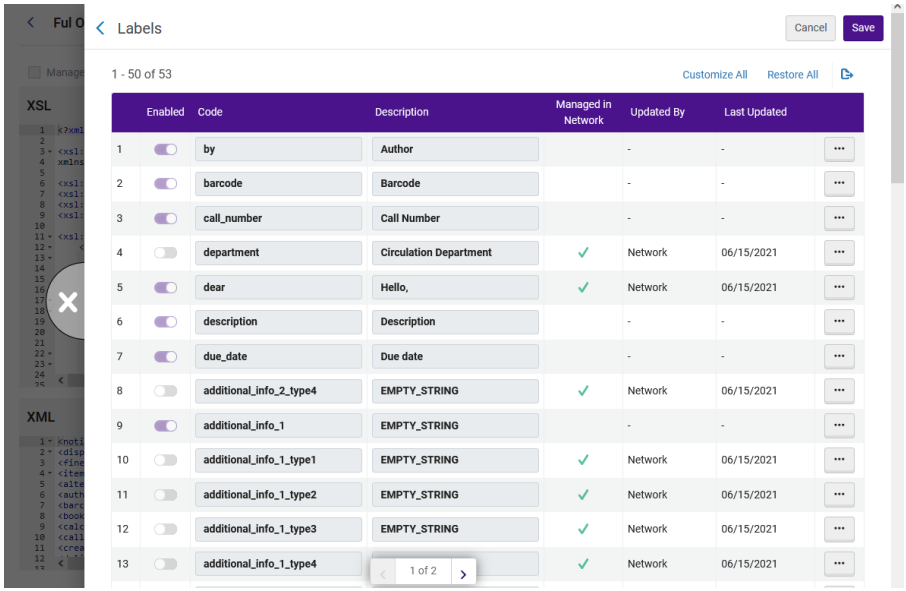
- Alert, Assigned User, Assignment, PO Line in Claim
- Creation Date, Renewal Date, Sent Date

Alma Menu Search Improvement

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

NEW LETTERS INTERFACE





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.

AUGUST RELEASE UPDATE

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

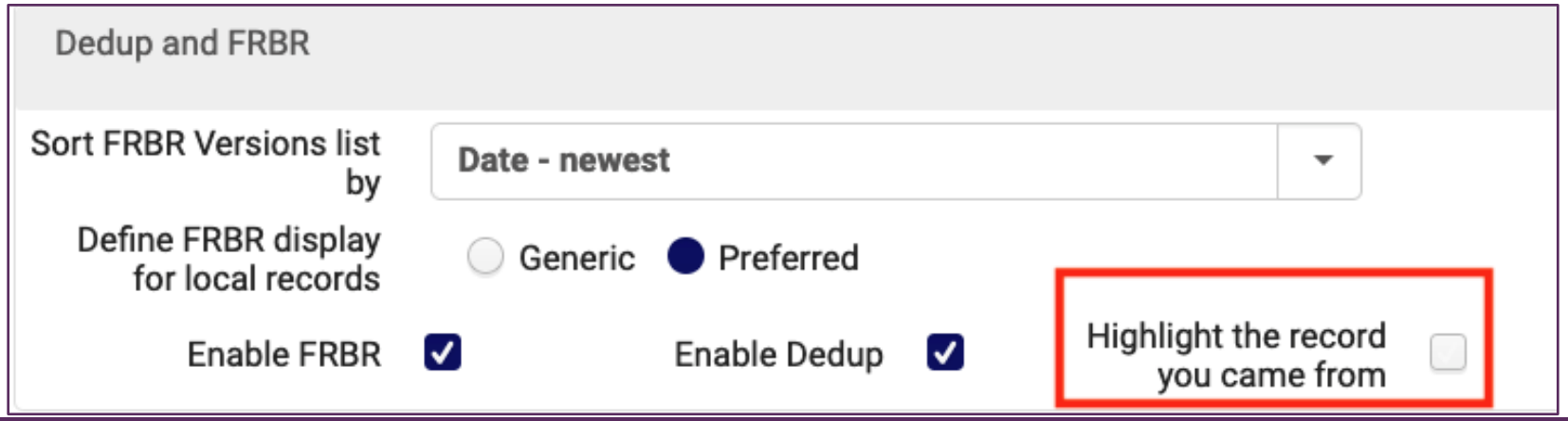
- Improved performance for Browse searches
  - Improves response time but makes some changes to browse search display
- Highlight selected record in FRBR version list
  - Selected record appears above the complete list of FRBR versions
- Resource Type Filter Bar enhancement
  - Resource Filter Bar results 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

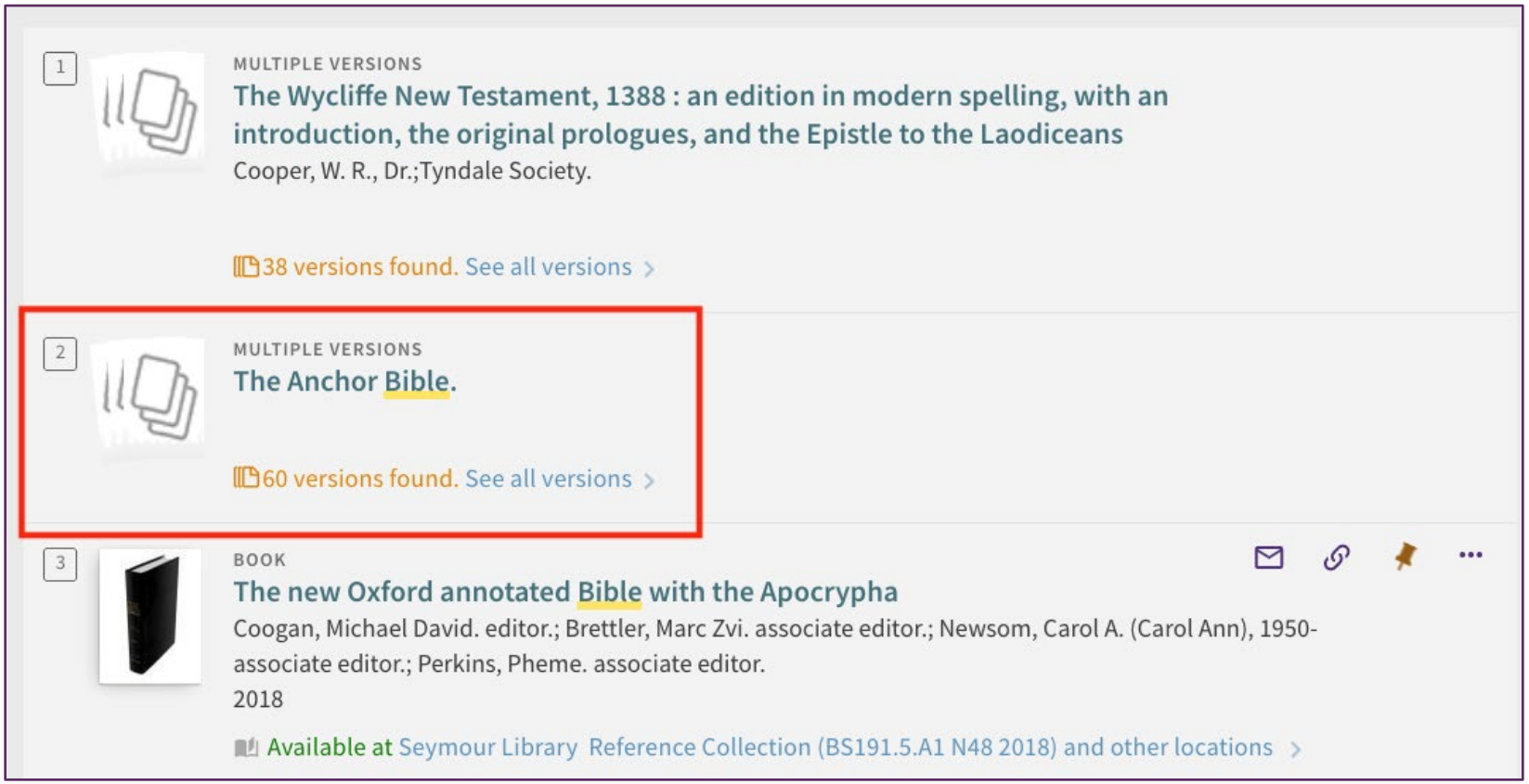
Highlight Selected Record in FRBR Version list

- 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



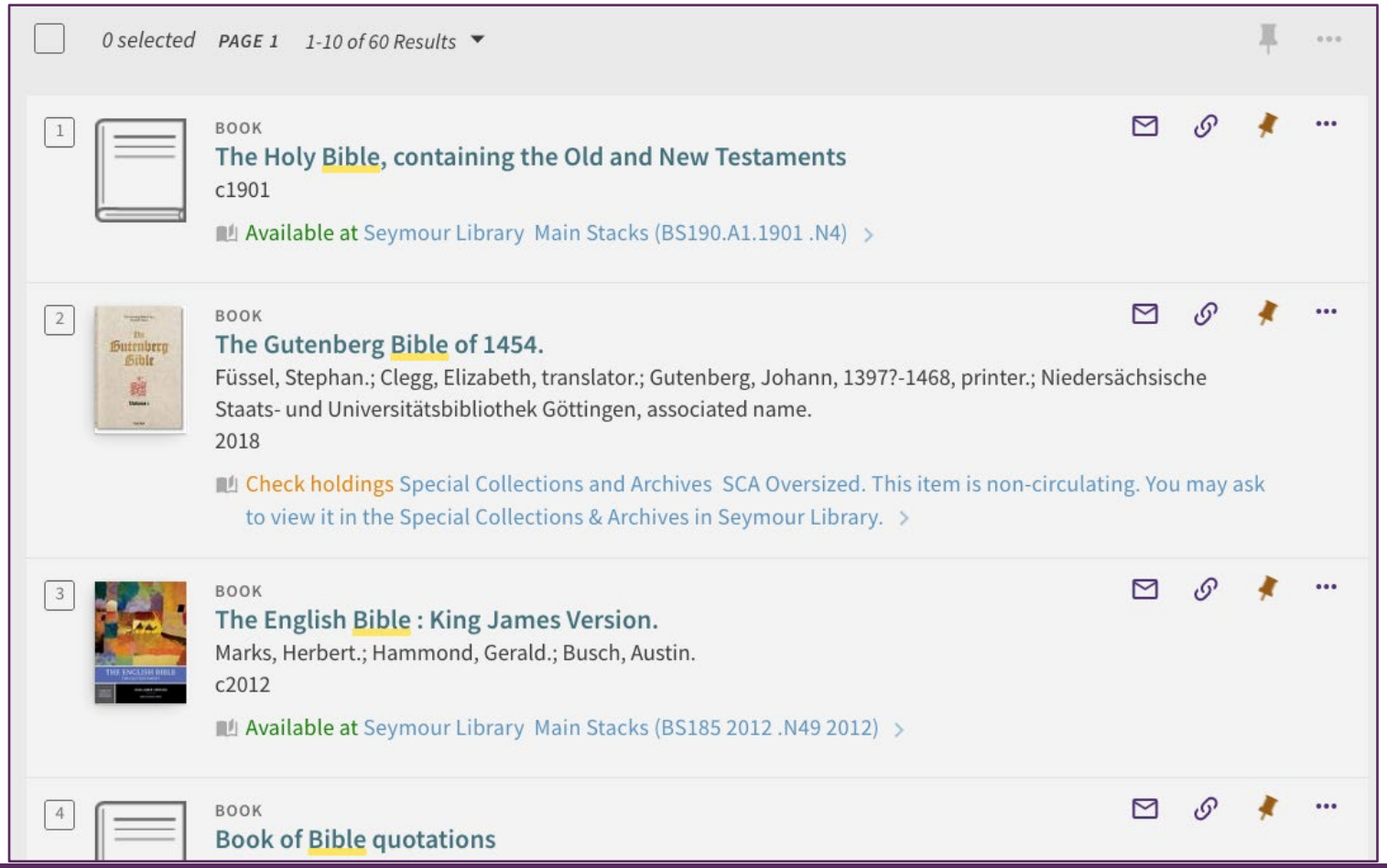
Highlight Selected Record in FRBR Version list

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



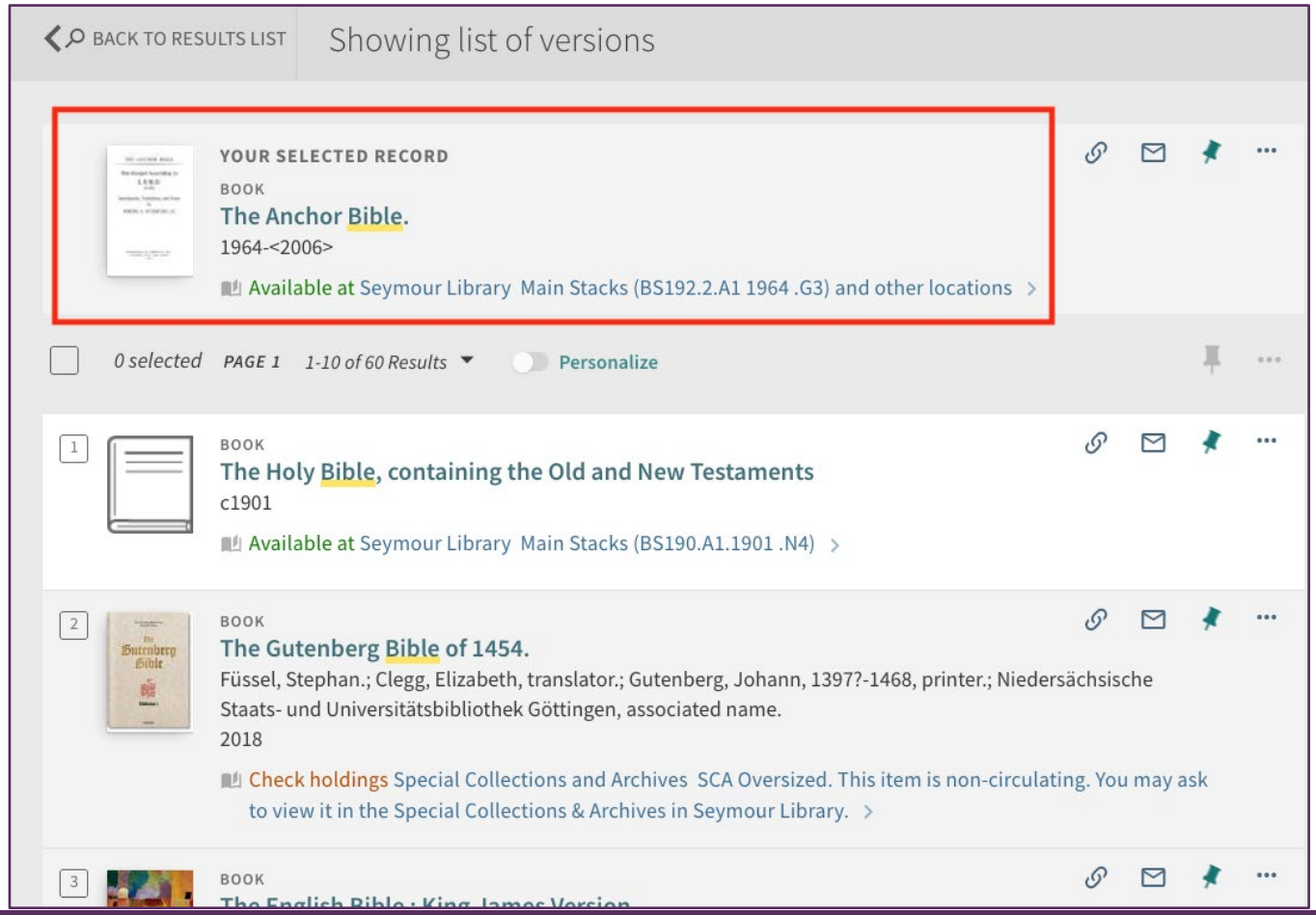
Highlight Selected Record in FRBR Version list

- Example: Version list

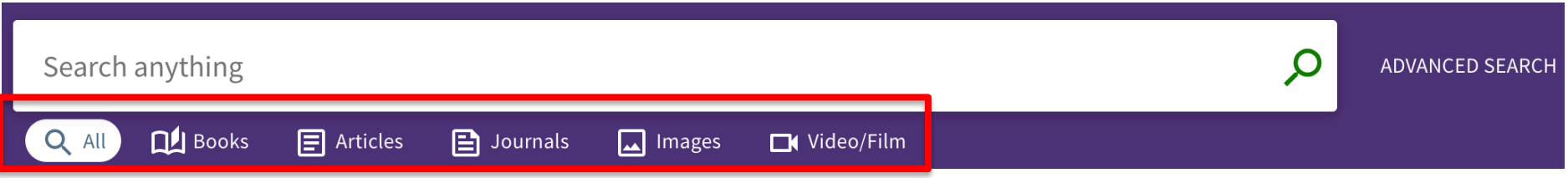


Highlight Selected Record in FRBR Version list

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



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
- 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.

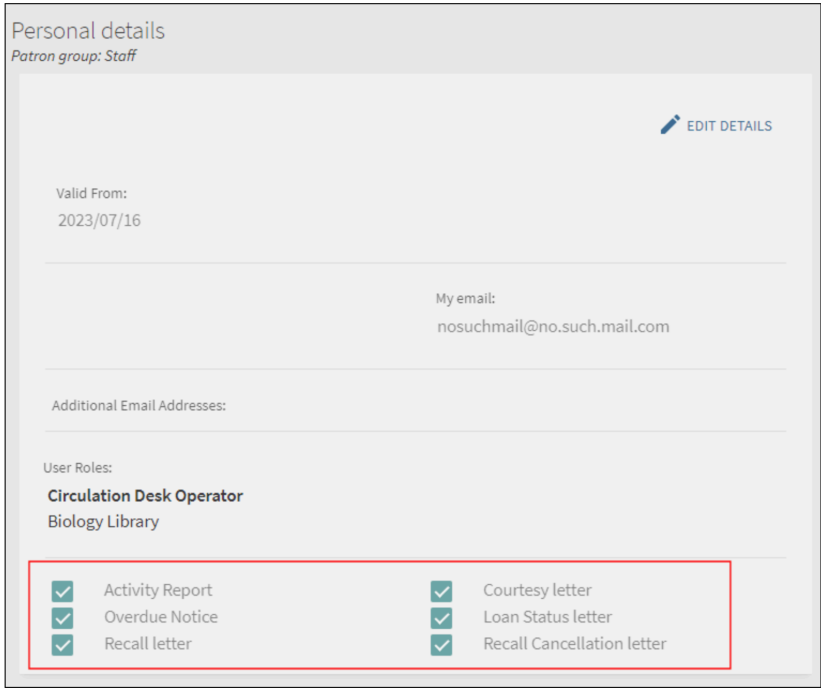
Resource Recommender Updates

- More about Resource Recommender: https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/120Other_Configurations/010Resource_Recommender_for_Primo_VE

- ~~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



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.lllinois.edu