



CARLI I-Share logo

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 AND PRIMO VE
FEBRUARY FEATURE RELEASE**

Alma/Primo VE Open Office Hours

February 8, 2024

Today's Agenda

- Announcements, Reminders, and upcoming events
- Alma and Primo VE February Quarterly Feature Release highlights



- The Ex Libris Users Group of North America (ELUNA) is holding an informational meeting about the upcoming ELUNA Annual Meeting conference in Minneapolis, MN, May 14-17.
 - [Register for the informational meeting](#) that will be held on February 12 at 12pm Central time, and if you cannot attend you will be sent a link to the recording.
 - More information about the event is available on the [ELUNA Website](#)

Premium Sandboxes (PSB) Refresh – February 2024

- Refresh will occur on February 11 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 in February.
- If you are currently using the PSB for testing, any examples you've set up will need to be recreated after the refresh.
- [More information on the PSBs](#)

- Let's Talk About Fulfillment: Alma Configuration – every other Tuesday afternoon at 2pm.
 - Next Session, Feb. 13: [Alma Configuration - Linked User Records](#)
 - List of sessions: [Let's Talk About Fulfillment 2023-2024 Series on Alma Configuration](#)
- [NC Live Service Informational Webinar](#) – February 28 at 10am-11am.
- Please check the [CARLI Calendar](#) for all upcoming events!

Alma February 2024 Quarterly Release Highlights

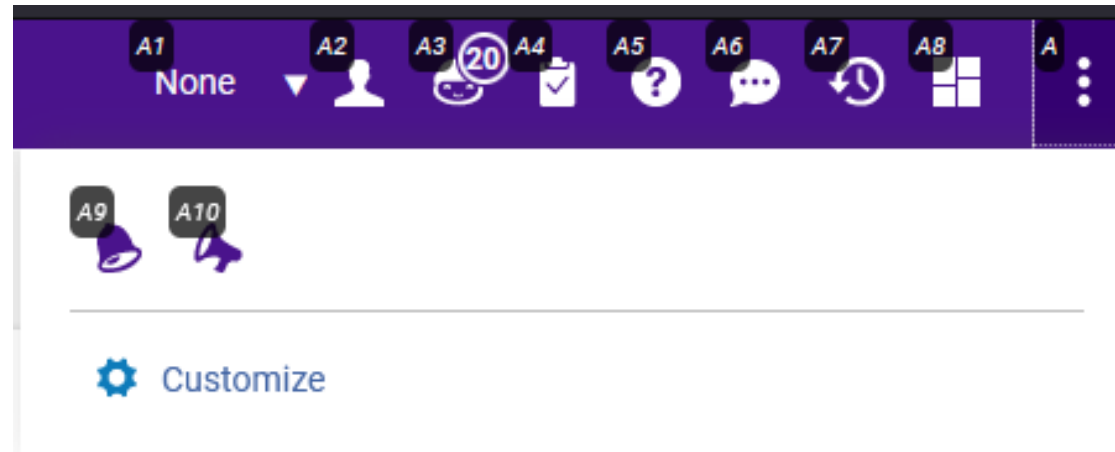


User Interface & Accessibility

New Alt-Key options to Top Right Menu bar

- Hold Alt key, then type A# to select one of the menus
- Type Alt+A to select the more menus (three vertical dots)

Top Right Menu also supports voice dictation



A screenshot of Alma's top right menu with global hot-keys highlighted as "A1" to "A10" and "A".



Acquisitions: PO Line Task List and PO Lines

New [Unified PO Line Task List](#) rollout is final.

- A known issue with saving logical sets using facets will be fixed in March.

New functions in PO lines

- Sliding panel for Funds, Material Supplies in POL
 - “Hamburger” menu opens search result.
 - Slide out icon shows the selected fund or vendor.
- **Save and Continue** now visible when viewing POL in Task List.

New Receiving from PO Line

Existing approach: Acquisitions > Receiving and Invoicing > Receive

New approach #1: Search POL, edit, receive from ordered items

	Library	Location	Call Number	Barcode	Availability	Item Policy	Item Descrip...	Receiving Date
1	Richard J Daley Library	(OB) Problem location from Migration	PT2715.T66 A6613 2023		● Not Received			

Actions menu: Edit, Receive, Delete

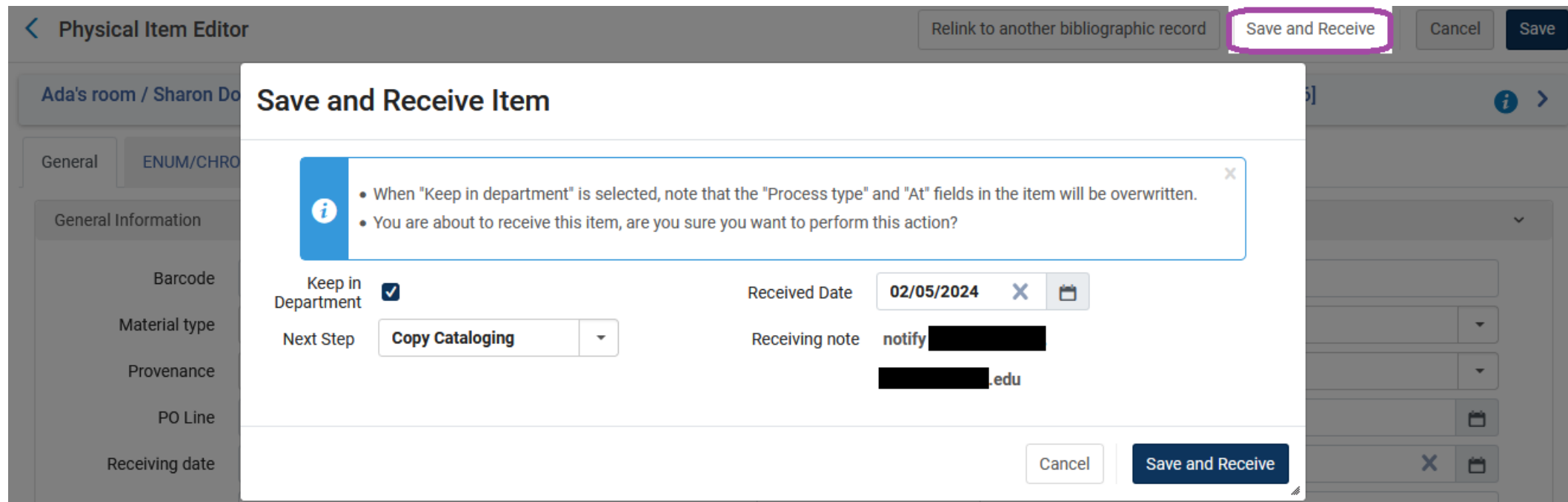
+ Add Items

A screenshot of the Ordered Items, or inventory section, for a PO Line in Alma. The actions menu for item is open showing choices of Edit, Receive, and Delete.

New Receiving from Item Record

New receiving approach #2: Receive from Item record

Save and Receive button sets received date, process type (if needed)



A screenshot of the Alma item record editor with the Save and Receive pop-up window displayed. The Save and Receive pop-up includes options to keep in department and set a process type, and to set the receipt date.

Item Record: Physical Condition List

List of physical conditions now configurable

Add options that you would like to track in items, searches, analytics.

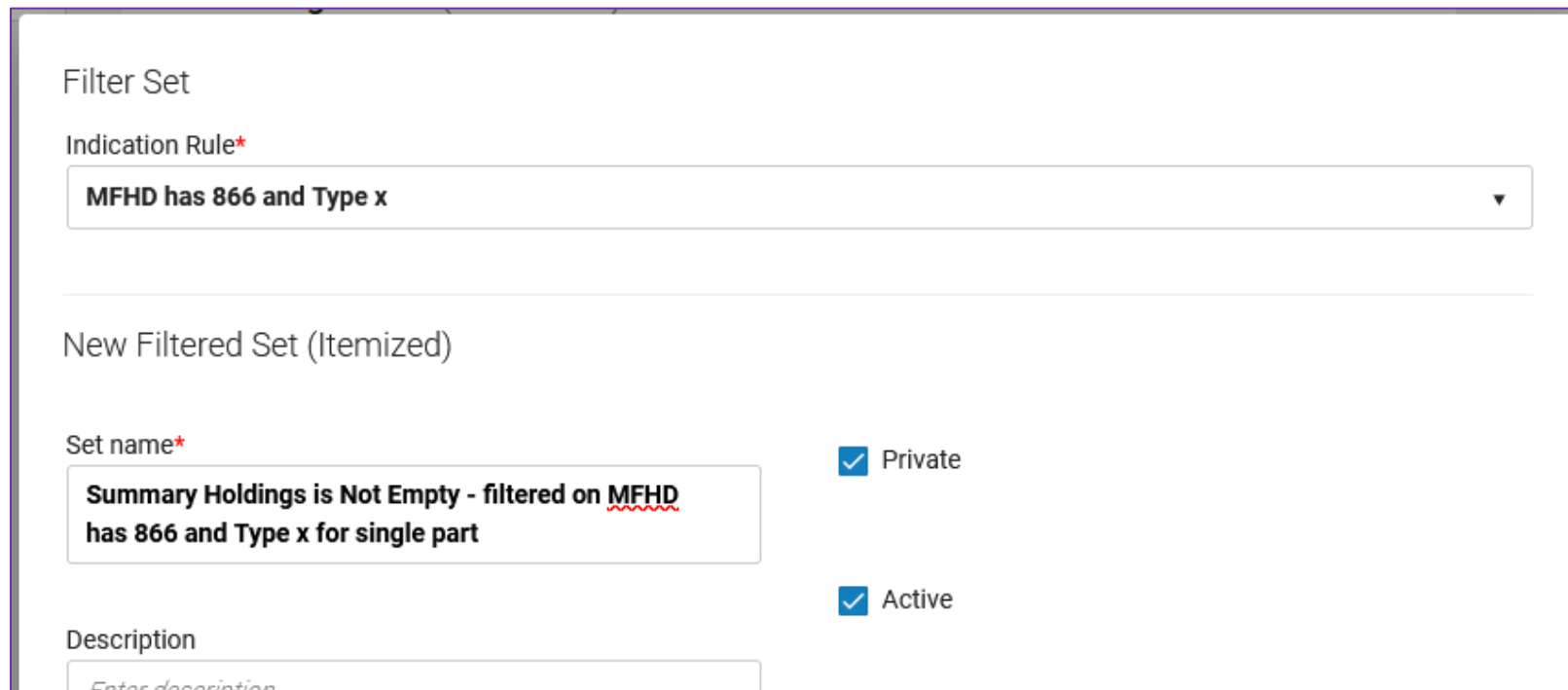
Enabled	Code	Description	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	BRITTLE	Brittle	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	FRAGILE	Fragile	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	DETERIORATING	Deteriorating	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	DAMAGED	Damaged	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>	WATER	Water Damage	<input type="radio"/>	carli_t...	02/05/2024
<input checked="" type="checkbox"/>	PAGES	Missing Pages	<input type="radio"/>	carli_t...	02/05/2024

A screenshot of Alma Physical Item Conditions configuration table with six rows displayed.

Filtering Holdings Record Sets

May now filter sets of holding records using indication rules

Useful for finding and correcting holdings record data (e.g., for LHRs)



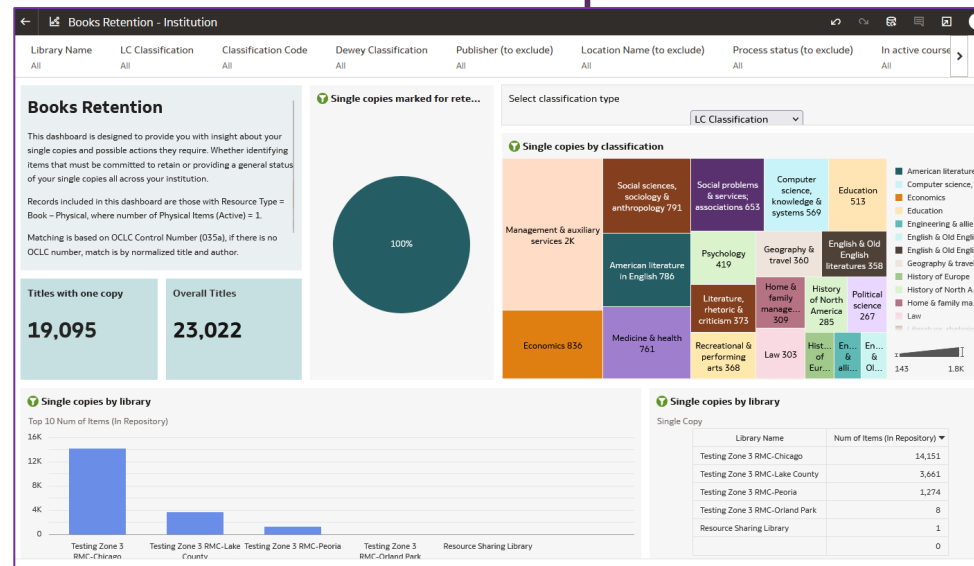
The screenshot shows a 'Filter Set' configuration interface. At the top, the title 'Filter Set' is displayed. Below it, the 'Indication Rule*' field is a dropdown menu with the selected option 'MFHD has 866 and Type x'. A horizontal line separates this from the 'New Filtered Set (Itemized)' section. Under this section, the 'Set name*' field contains the text 'Summary Holdings is Not Empty - filtered on MFHD has 866 and Type x for single part', where 'MFHD' is underlined in red. To the right of the set name are two checked checkboxes: 'Private' and 'Active'. At the bottom, the 'Description' field is empty with the placeholder text 'Enter description'.

A screenshot of Alma's Filter Set pop-up screen, with an indication rule selected to apply a filter against a set of holding records.

Analytics and Data Visualizations

New Data Visualization dashboards for collection management

- Shared Folders > Alma > Inventory
- Available as analytics objects
- Dashboards have documentation panels



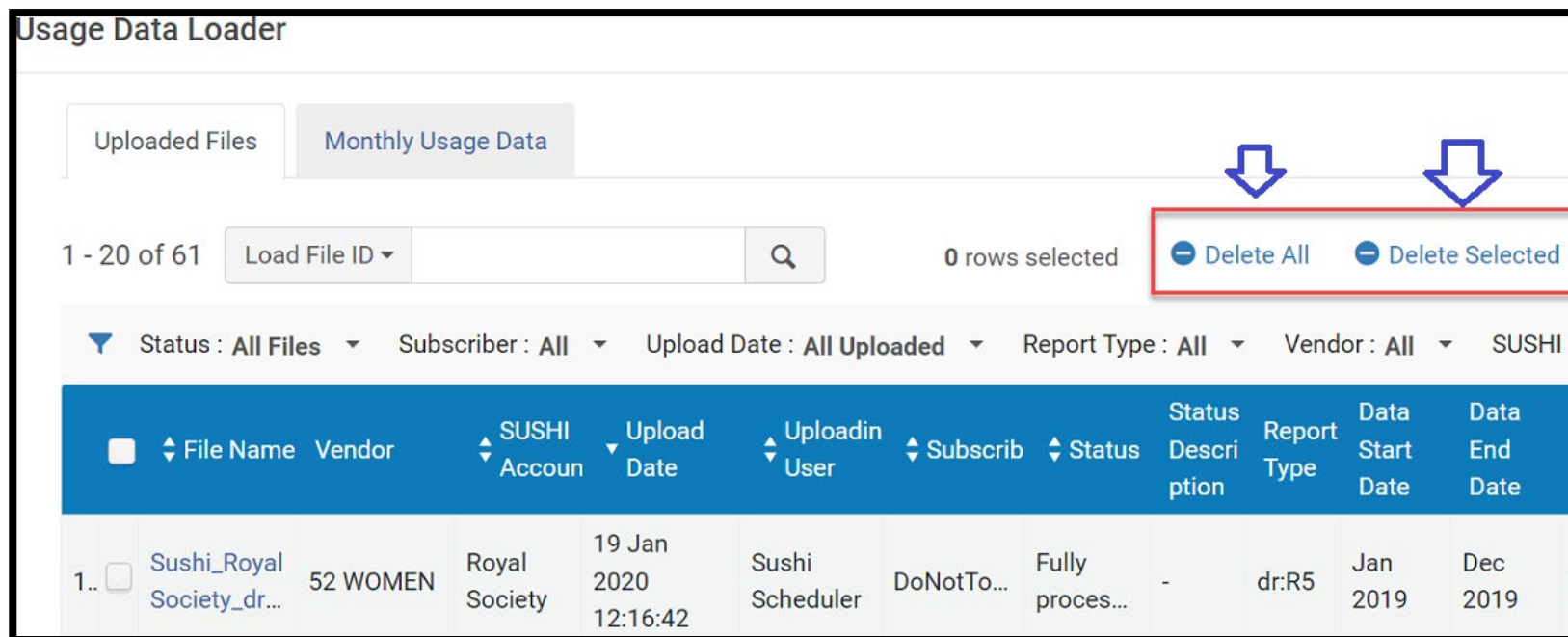
A screenshot of Alma's Filter Set pop-up screen, with an indication rule selected to apply a filter against a set of holding records.

Electronic Resources and Link Resolver Updates

Automatic Upload of Electronic Holdings now supported for Taylor & Francis journals

- More information at [Upload Electronic Holdings from Taylor & Francis](#)

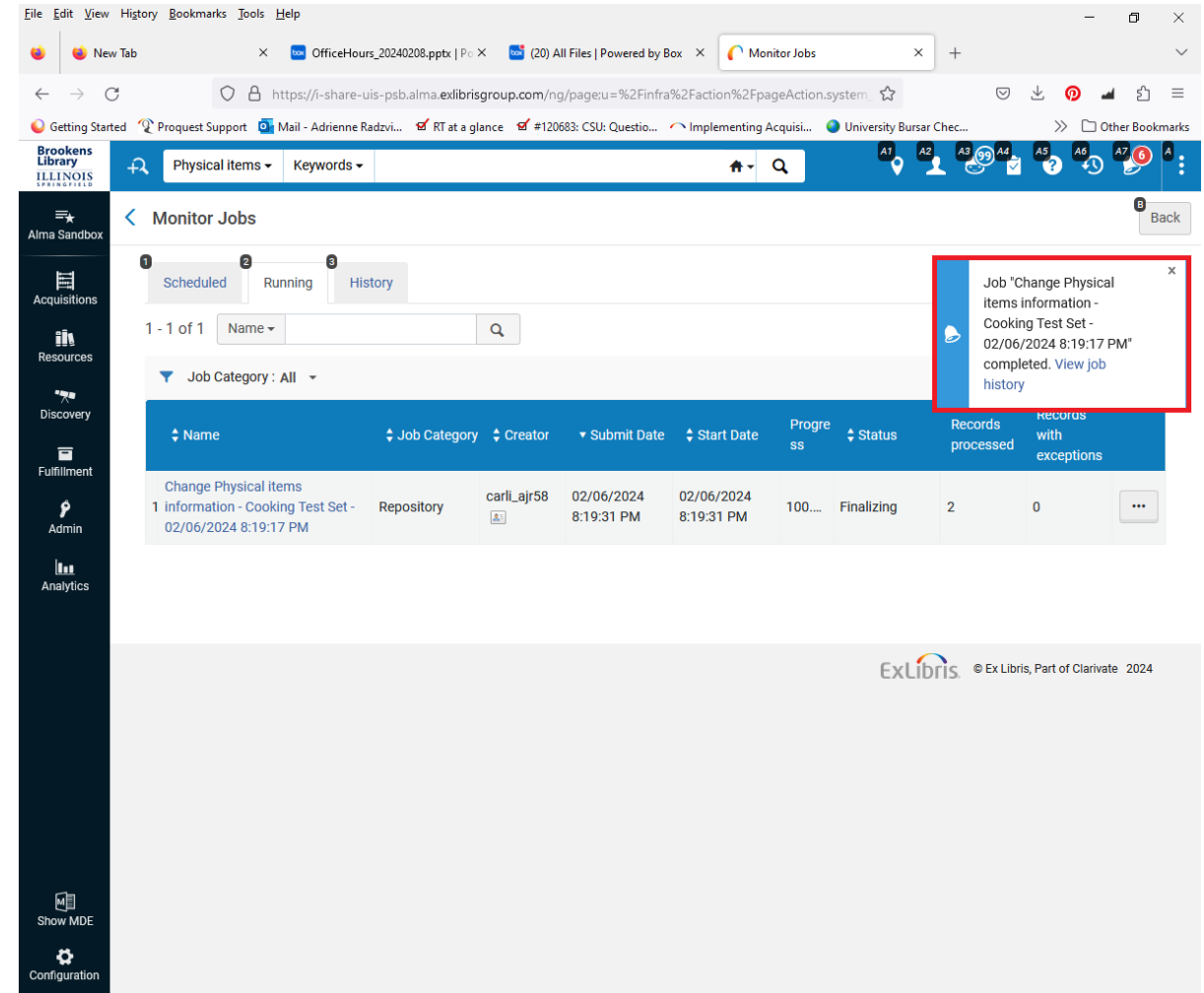
Bulk Deletion of COUNTER Reports (must have “Usage Data Operator” role.)



The screenshot shows the 'Usage Data Loader' interface. At the top, there are two tabs: 'Uploaded Files' and 'Monthly Usage Data'. Below the tabs, there is a search bar with 'Load File ID' and a search icon. To the right of the search bar, it says '0 rows selected'. Below this, there are two buttons: 'Delete All' and 'Delete Selected', both of which are highlighted with a red box. Above these buttons, there are two blue arrows pointing downwards. Below the buttons, there are several filter dropdowns: 'Status: All Files', 'Subscriber: All', 'Upload Date: All Uploaded', 'Report Type: All', 'Vendor: All', and 'SUSHI A'. Below the filters, there is a table with the following columns: 'File Name', 'Vendor', 'SUSHI Account', 'Upload Date', 'Uploadin User', 'Subscrib', 'Status', 'Status Description', 'Report Type', 'Data Start Date', and 'Data End Date'. The first row of the table is highlighted in blue and contains the following data: '1..', 'Sushi_Royal Society_dr...', '52 WOMEN', 'Royal Society', '19 Jan 2020 12:16:42', 'Sushi Scheduler', 'DoNotTo...', 'Fully proces...', '-', 'dr:R5', 'Jan 2019', and 'Dec 2019'.

A screenshot of the Alma Usage Data Loader screen with Delete All and Deleted Selected highlighted.

When you run a job, instead of having to select Refresh over and over, or waiting for an email notification, Alma will display a message when the job finishes.



A screenshot of the Alma Monitor Jobs screen showing a highlighted pop-up window that will automatically display when an Alma job finishes.

- The Course Loader (Configuration > General > External Integrations > Integration Profiles) directory now supports Excel files in addition to .csv files.
- You can configure Alma to include archived lists in the Demand in other lists calculation, which enables you to see which reading lists or courses use the same resource as you review and process citations.



Primo VE February 2024 Quarterly Release Highlights



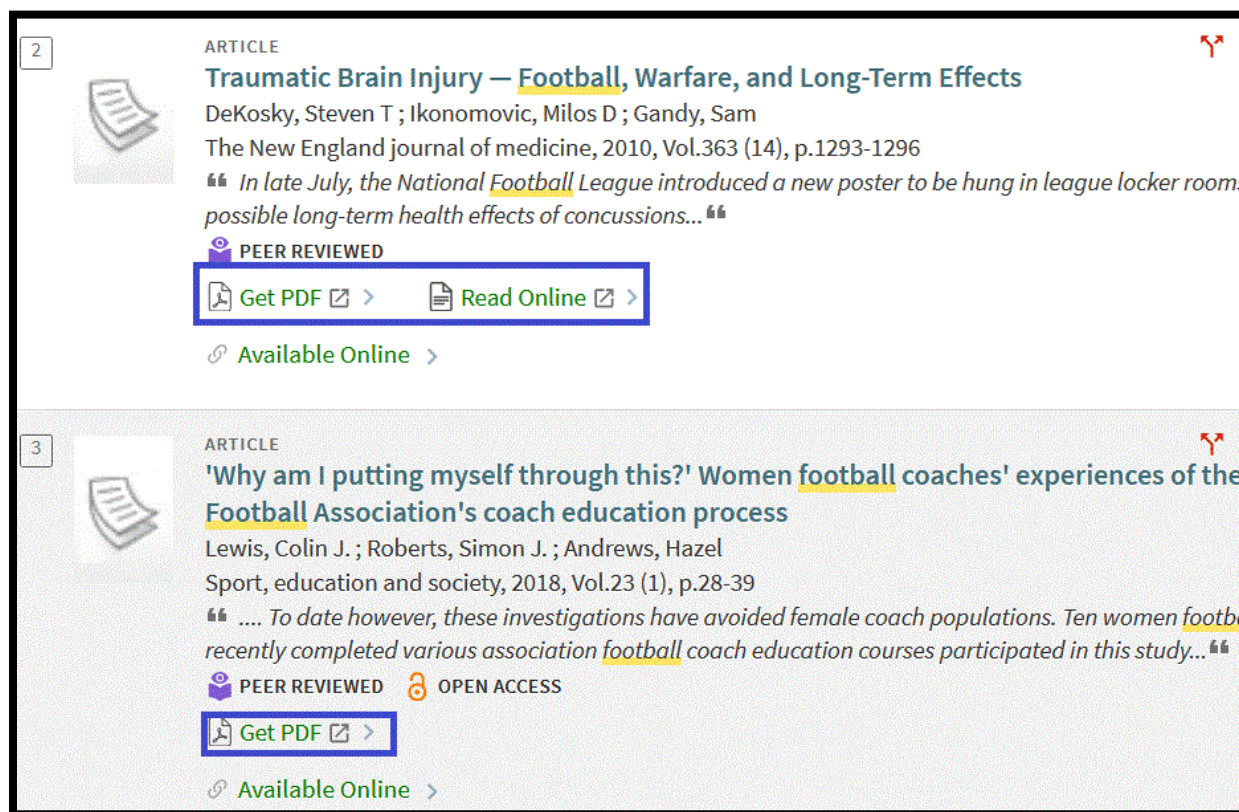


Primo VE – QuickLinks Major Change Coming

Automatically Enabled QuickLinks

- QuickLinks option is currently at Primo VE View level; will be moving to Institution level with this change in May 2024.
- In February optional to enable QuickLinks, HOWEVER Alma is making QuickLinks in brief results displays the _default_ in May 2024
- Can opt out of this new Institution level parameter.
- More [information on QuickLinks](#)
- QuickLinks' [cooperating vendors.](#)

Primo VE – QuickLinks Examples



The screenshot displays two article entries from Primo VE. Each entry includes a document icon, a title, authors, journal information, a quote, and a 'PEER REVIEWED' badge. The first entry, 'Traumatic Brain Injury — Football, Warfare, and Long-Term Effects', has 'Get PDF' and 'Read Online' links highlighted with a blue box. The second entry, ''Why am I putting myself through this?' Women football coaches' experiences of the Football Association's coach education process', has only the 'Get PDF' link highlighted with a blue box. Both entries also feature an 'Available Online' link.

2

ARTICLE

Traumatic Brain Injury — Football, Warfare, and Long-Term Effects

DeKosky, Steven T ; Ikonomic, Milos D ; Gandy, Sam

The New England journal of medicine, 2010, Vol.363 (14), p.1293-1296

“ In late July, the National Football League introduced a new poster to be hung in league locker rooms, possible long-term health effects of concussions...”

PEER REVIEWED

Get PDF > Read Online >

Available Online >

3

ARTICLE

'Why am I putting myself through this?' Women football coaches' experiences of the Football Association's coach education process

Lewis, Colin J. ; Roberts, Simon J. ; Andrews, Hazel

Sport, education and society, 2018, Vol.23 (1), p.28-39

“ To date however, these investigations have avoided female coach populations. Ten women football recently completed various association football coach education courses participated in this study...”

PEER REVIEWED OPEN ACCESS

Get PDF >

Available Online >

A screenshot of Primo VE article results with QuickLinks examples of “Get PDF” and “Read Online” highlighted.

Change in default setting in three months May 2024!



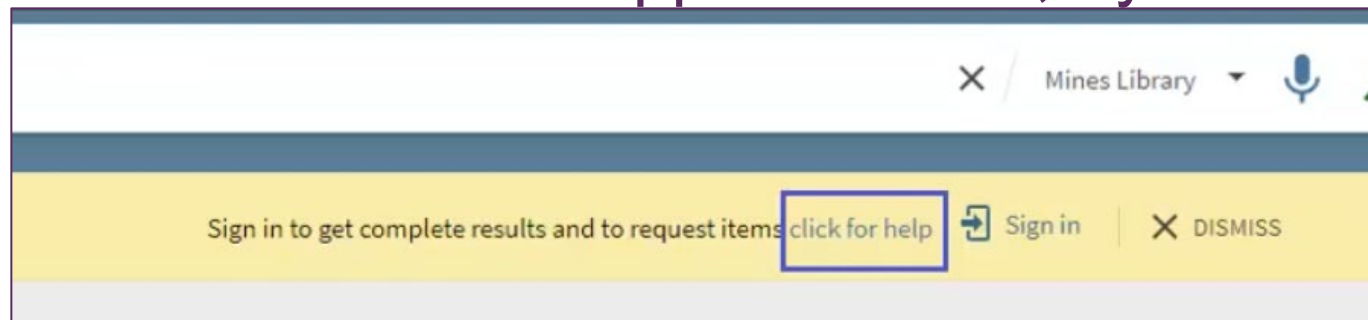
Primo VE – CDI records

CDI Subject Normalization and New Keyword Fields –

- Incoming subject terms are now mapped to a controlled vocabulary, which is based primarily on LCSH and MeSH.
- Has created indexed fields “Subject field (normalized)” and “Keyword field”.
- Using normalized subjects is OFF by default - must enable in each Primo VE View’s General tab > Use normalized CDI subjects
- For more details, see [Using Normalized Subject Headings from CDI.](#)

Primo VE – HTML Coding Possible in More Labels

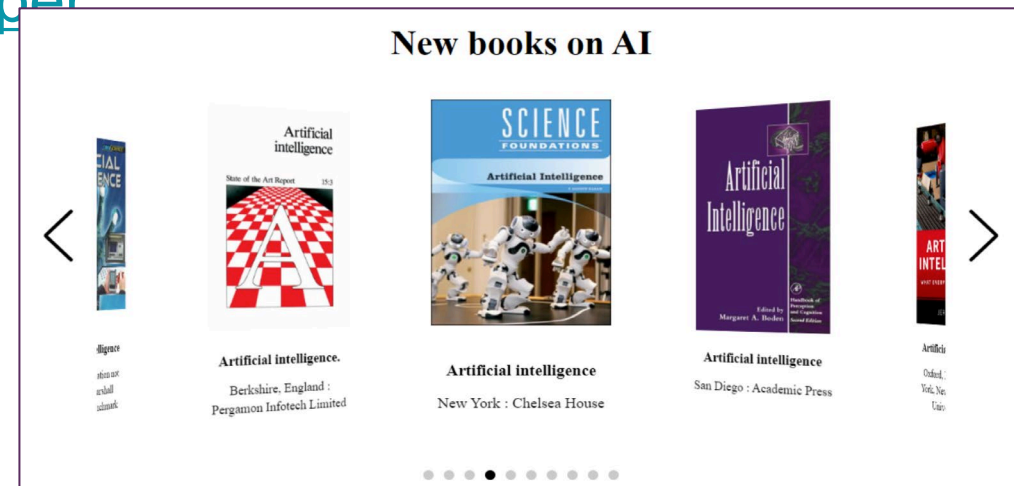
- Several more labels in Primo VE now support HTML coding
- Includes the <href> tag for linking
- Non-comprehensive list of labels that support HTML:
[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/030Configuring_Display_Labels_for_Primo_VE#Codes_that_Support_HTML_Formatting](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/030Configuring_Display_Labels_for_Primo_VE#Codes_that_Support_HTML_Formatting)
- If you're not sure if a label supports HTML, try it in a Sandbox first



Screenshot of a Primo VE label with an embedded HTML link saying "click for help"

New Primo VE Showcase Widget

- Embed a visual carousel on any website – [Instructions on Ex Libris Developer Network](#)
- Contents are results from a Primo VE search
- Limited to 10 results
- Requirements:
 - Configure website domains in Alma
 - JavaScript file customization
 - Host the JavaScript file on the website



Example Showcase Widget carousel



Questions & Answers



This is a decorative image of a long-haired black cat resting inside a cardboard box.

