



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 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.”

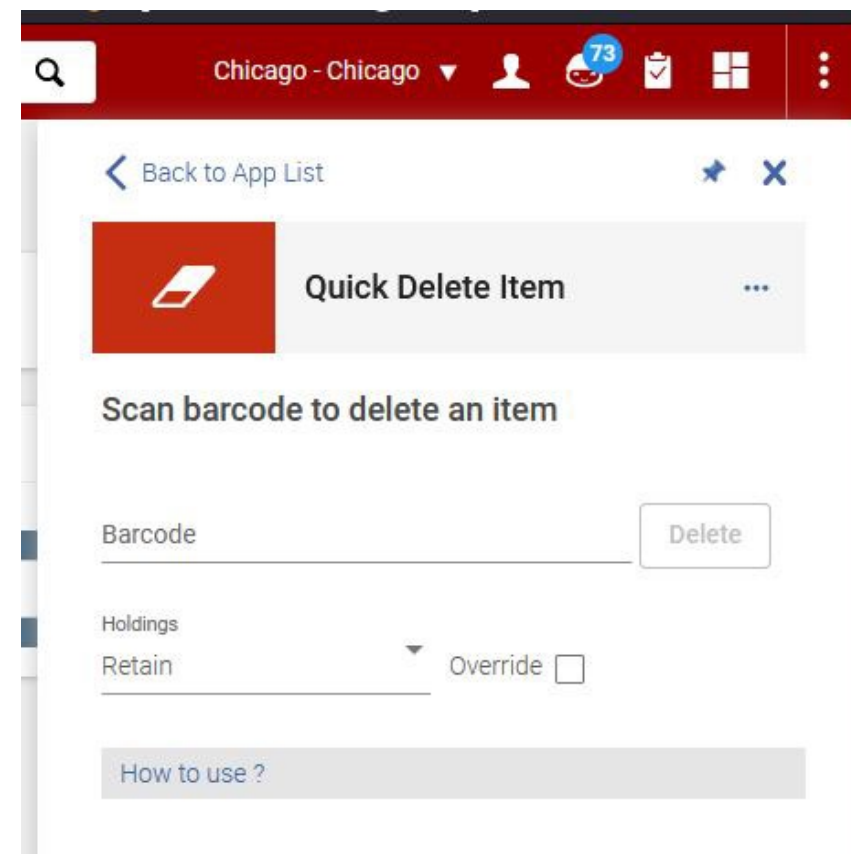
“Cloud Apps can add *new features* beyond core Ex Libris functionality, can *integrate* with other systems, or can provide *shortcuts* and *efficiencies* for institution-specific workflows.”

—Josh Weisman, Ex Libris, July 2020

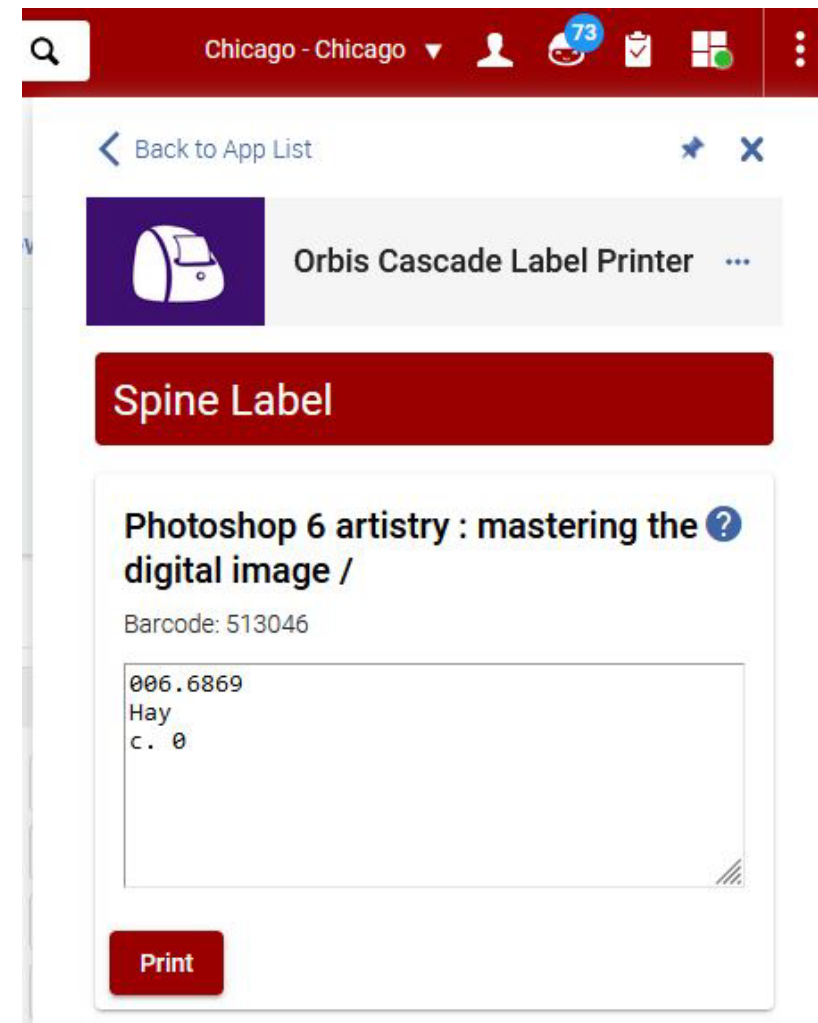
<https://developers.exlibrisgroup.com/blog/announcing-ex-libris-cloud-apps/>



- 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

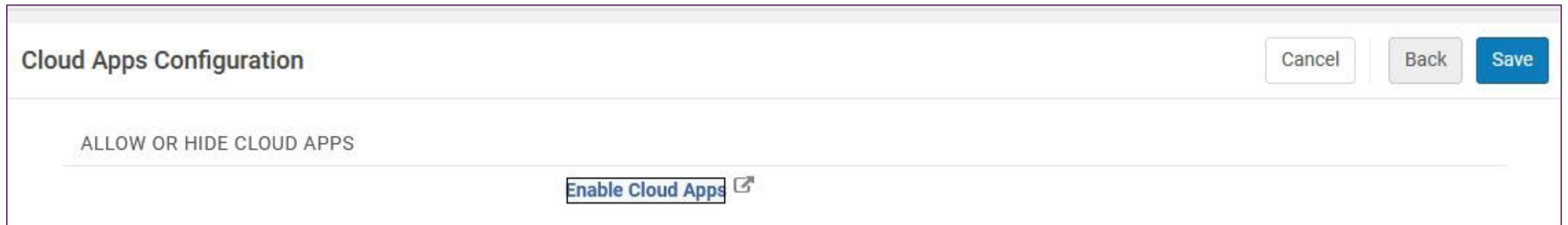


- Apps are developed by members of the Alma community
 - Vetted by Ex Libris for security, consistency
 - Ex Libris supports apps that they created
 - Individual developers support their own apps
 - Documentation provided by developer
 - Expects familiarity with normal Alma workflows
 - Identifies additional 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



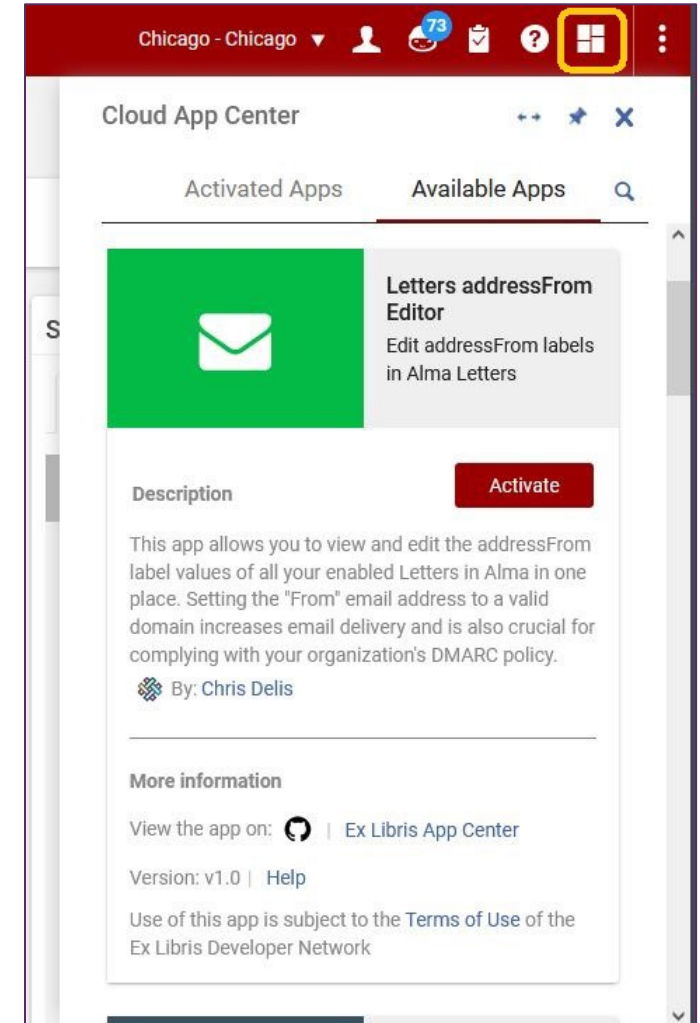
Initial Configuration

- 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, there is a header bar with the title 'Cloud Apps Configuration' on the left and three buttons ('Cancel', 'Back', and 'Save') on the right. Below the header, there is a section titled 'ALLOW OR HIDE CLOUD APPS'. Under this section, there is a button labeled 'Enable Cloud Apps' with an external link icon (a small square with a diagonal line) to its right.

- 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

CancelBackSave

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)

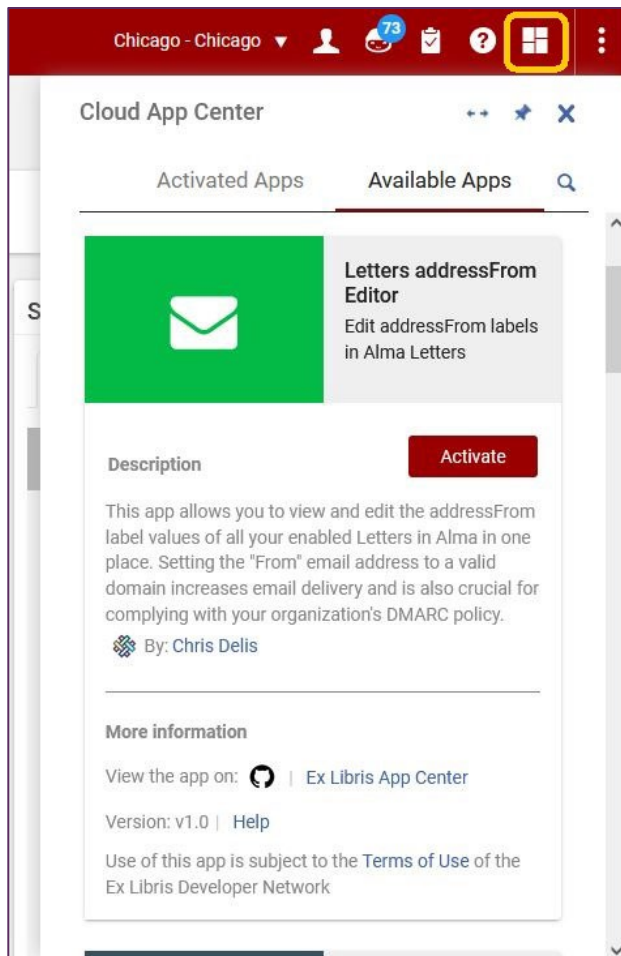
Ex Libris YouTube channel: [Getting More out of Alma with Cloud Apps](#) (56:15)

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

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



Demonstration



Questions on Cloud Apps



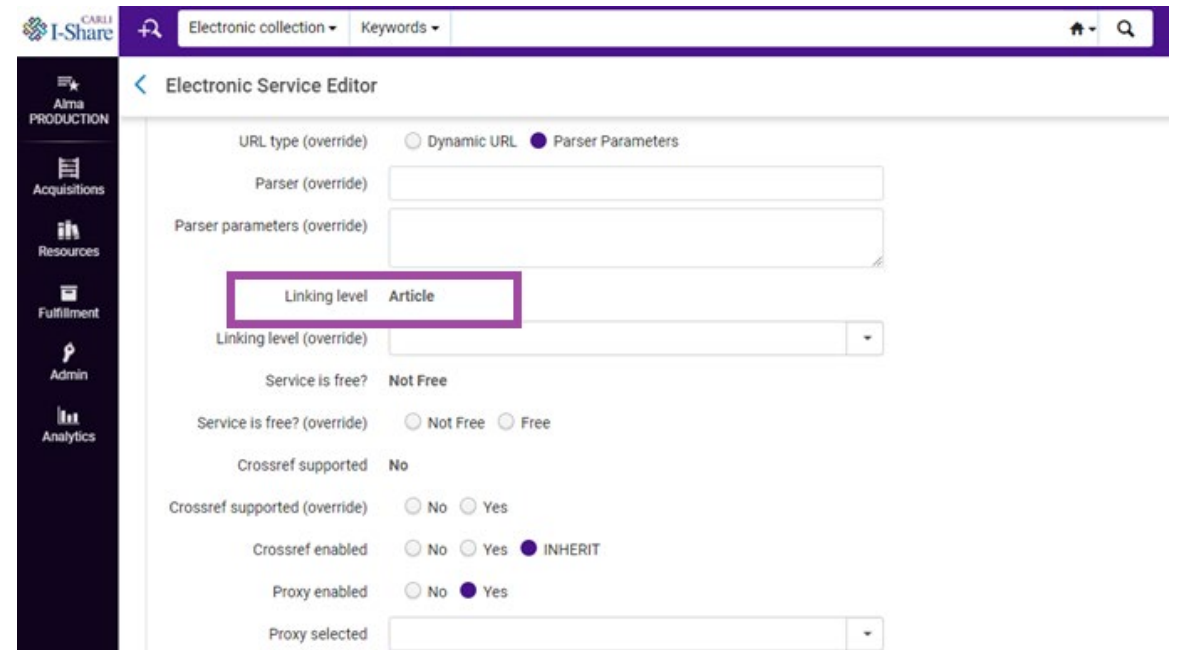
NewsBank Article-Level-Linking – What and Why?

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. On the left is a dark sidebar with navigation icons for Alma PRODUCTION, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main content area has a header with 'Electronic collection' and 'Keywords' dropdowns. Below this, the 'Linking level' dropdown menu is open, showing 'Article' as the selected option, which is highlighted by a red rectangle. Other settings visible include 'URL type (override)' with 'Dynamic URL' and 'Parser Parameters' radio buttons, 'Parser (override)' and 'Parser parameters (override)' text boxes, 'Service is free?' with 'Not Free' selected, 'Crossref supported' with 'No' selected, and 'Crossref enabled' with 'INHERIT' selected.

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



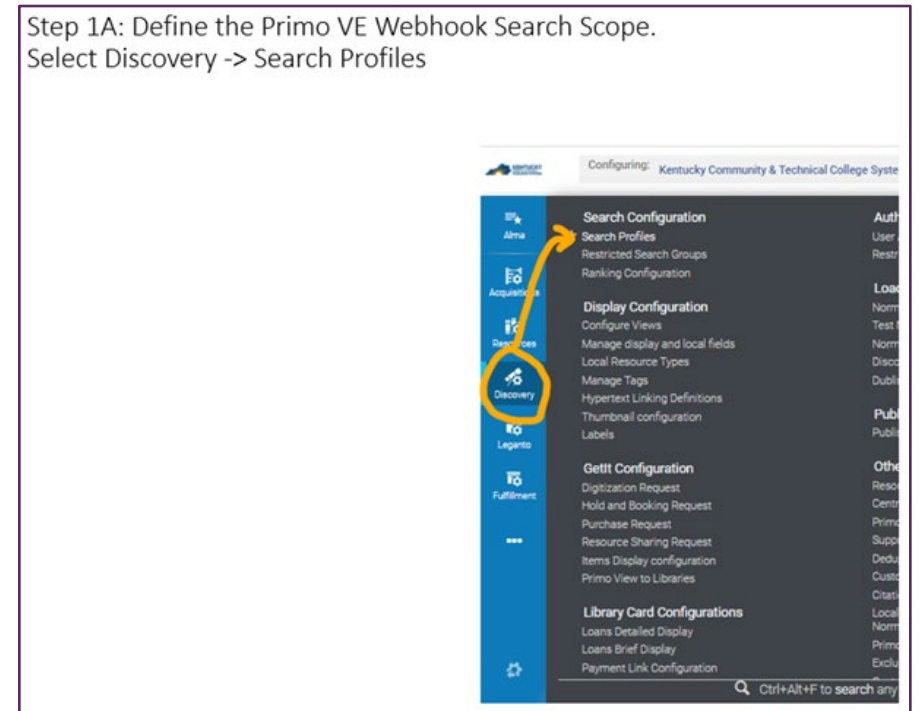
NewsBank 50 years logo from Facebook.

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



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

- 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

