

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Personalisation and Efficiency

Some Tips and Tricks for Personalizing Your Alma

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Agenda



UI preferences & personalization options



Tools to increase efficiency



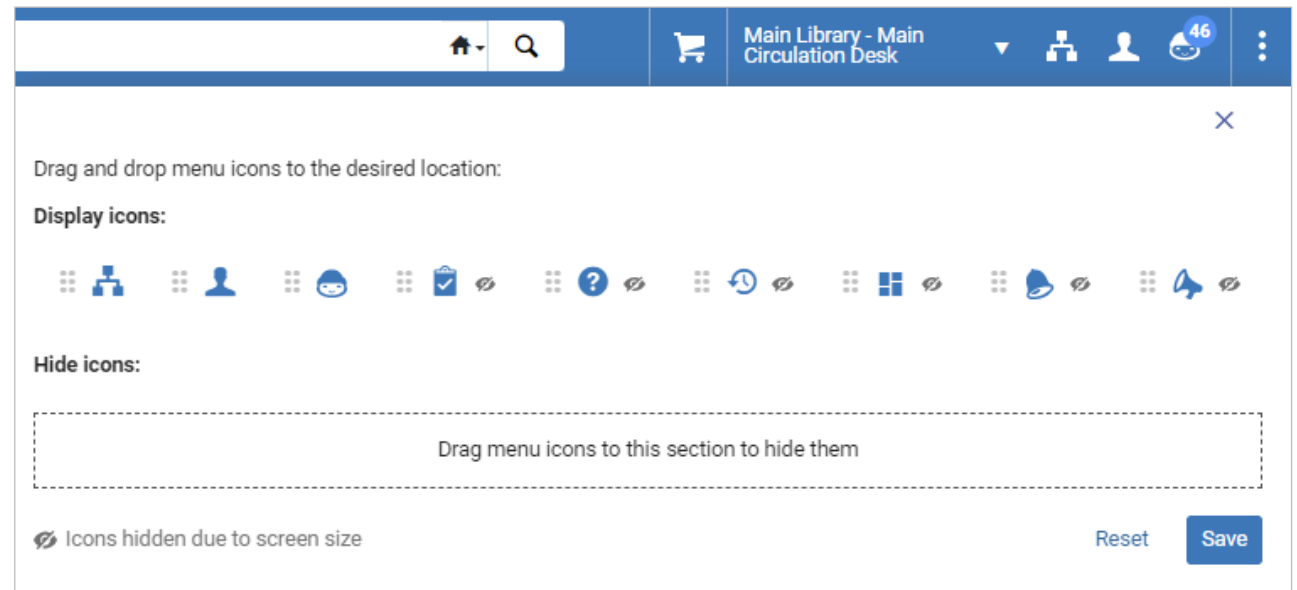
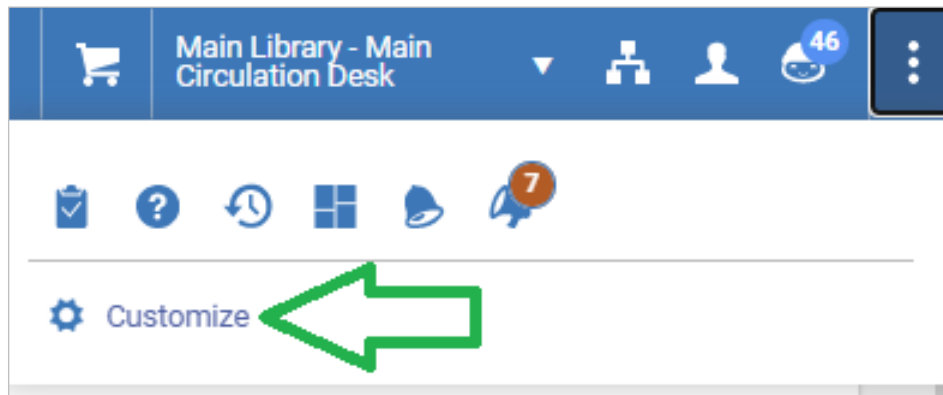
The new UX and what it can do for you



UI Preferences & Personalization Options

Configuring the Persistent Menu

Easy access to your commonly used actions



UI Preferences

The screenshot shows a user profile dropdown menu. At the top, the user's name "Ford Prefect" and "User Details" are displayed. Below this, there are options for "English", "Change Password", and "UI preferences". The "UI preferences" section is highlighted with a green border and contains a "Display density" selector with three options: "A≡", "A≡", and "A≡". Below this is a "Shortcuts customization" section, followed by "Feature Rollout Configuration" and a "Sign out" button.

Display Density

The image displays two overlapping screenshots of a library catalog interface, demonstrating the 'Display Density' feature. Both screenshots show search results for 'Physical Titles (1 - 16 of 16) | nice'.

Top Screenshot (Compact View):

- Facets:** Material Type (Book (10), Music (5), Visual material (1)), Resource Type (Audio musical - Physical (5), Book - Physical (10), Projected medium - Physi... (1)), Language (English (13), French (3), German (1), N/A (2)), Publication Year (1916 - 1967 (4), 1978 - 1989 (3), 1994 - 1999 (4), 2000 - 2012 (5)).
- Search Results:** Item 1: **A lover would be nice / by F. Hugh Herbert.** Book By Herbert, F. Hugh (New York : The Macaulay Co, c1935.) Series: Harvard College Library preservation microfilm program ; 04267. Modification Date: 02/27/2023 09:45. Creation Date: 09/15/2011 16:10. Language: English. Physical (1).
- User Panel:** Ford Prefect, User Details. English. Change Password. UI preferences: Display density (Compact selected), Shortcuts customization.

Bottom Screenshot (Expanded View):

- Facets:** Material Type (Book (10), Music (5), Visual material (1)), Resource Type (Audio musical - Ph... (5), Book - Physical (10), Projected medium ... (1)), Language (English (13), French (3), German (1), N/A (2)), Publication Year (1916 - 1967 (4), 1978 - 1989 (3), 1994 - 1999 (4), 2000 - 2012 (5)).
- Search Results:** Item 1: **A lover would be nice / by F. Hugh Herbert.** Book By Herbert, F. Hugh (New York : The Macaulay Co, c1935.) Series: Harvard College Library preservation microfilm program ; 04267. Modification Date: 02/27/2023 09:45. Creation Date: 09/15/2011 16:10. Language: Eng... Physical (1).
- User Panel:** Ford Prefect, User Details. English. Change Password. UI preferences: Display density (Expanded selected), Shortcuts customization, Feature Rollout Configuration, Sign out.

Keyboard Shortcuts & Customization

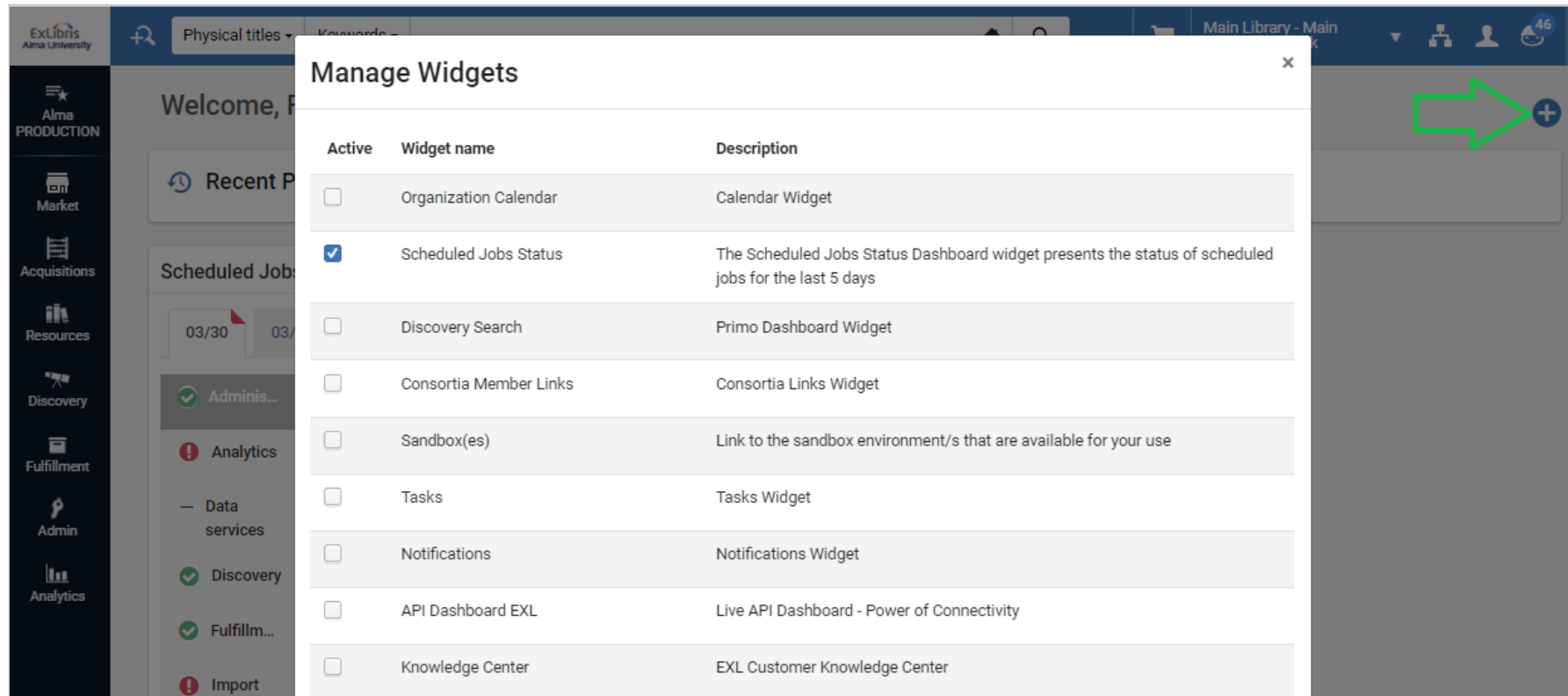
< Shortcuts customization

	Active	Code	Description
1	<input checked="" type="checkbox"/>	Shift + F2	Go to homepage
2	<input checked="" type="checkbox"/>	Alt + W	Go to fulfillment checkout
3	<input checked="" type="checkbox"/>	Alt + R	Go to fulfillment discharge
4	<input checked="" type="checkbox"/>	Alt + Ctrl + S	Go to scan in interface
5	<input checked="" type="checkbox"/>	Alt + Ctrl + U	Immediate job
6	<input checked="" type="checkbox"/>	Alt + P	Go to fulfillment task List
7	<input checked="" type="checkbox"/>	/	Persistence search
8	<input checked="" type="checkbox"/>	Alt + Ctrl + F	Search in menu
9	<input checked="" type="checkbox"/>	Esc	Close search in menu
1...	<input type="checkbox"/>	Alt + number	Tab navigation
1...	<input checked="" type="checkbox"/>	Alt + \	Pagination find



Alma Home Page

- Select helpful widgets to be [displayed in your home page](#)
- An admin can [customize widget options](#)



The screenshot shows the Alma Home Page interface. A 'Manage Widgets' dialog box is open, displaying a list of widgets that can be added to or removed from the home page. The dialog has a title bar with a close button (X) and a table with the following columns: Active, Widget name, and Description.

Active	Widget name	Description
<input type="checkbox"/>	Organization Calendar	Calendar Widget
<input checked="" type="checkbox"/>	Scheduled Jobs Status	The Scheduled Jobs Status Dashboard widget presents the status of scheduled jobs for the last 5 days
<input type="checkbox"/>	Discovery Search	Primo Dashboard Widget
<input type="checkbox"/>	Consortia Member Links	Consortia Links Widget
<input type="checkbox"/>	Sandbox(es)	Link to the sandbox environment/s that are available for your use
<input type="checkbox"/>	Tasks	Tasks Widget
<input type="checkbox"/>	Notifications	Notifications Widget
<input type="checkbox"/>	API Dashboard EXL	Live API Dashboard - Power of Connectivity
<input type="checkbox"/>	Knowledge Center	EXL Customer Knowledge Center

A green arrow points to a plus sign icon in the top right corner of the home page, indicating where to click to manage widgets.

- Select a Data Visualization Workbook as your homepage
- Analytics staff can [create custom data visualizations](#)

The screenshot shows the Alma Home Page navigation menu. The left sidebar contains icons for Alma, Market, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main content area is titled "My Homepage" and features a "Usage Tracking" dropdown menu. A search box is visible within the dropdown, and the menu items are "Alma Homepage" and "Usage Tracking". Below the dropdown is a "Quick links menu" with three items: "1 Manage Deleted Repository" (Ctrl+Alt+1), "2 All Mapping Tables" (Ctrl+Alt+2), and "3 Evidence Based Acquisition" (Ctrl+Alt+3). At the bottom of the menu are options to "Pin Quick Links menu", "Clear Quick Links menu", "Customize main menu links", and "Collapse menu".

The screenshot shows the Alma Analytics dashboard. The top navigation bar includes "All titles", "MMS ID", and user information for "O'Neill". The dashboard displays three key metrics: "Total Analytics Queries" (111,735), "Total Rows Retrieved" (2,756,218), and "Average Running Time per Query (sec...)" (10.24). Below these metrics is a "Query Success Rate" pie chart showing 98.95% for "Query completed successfully" and 1.05% for "Query failed". To the right is a "Query Trend - Last two years" bar chart showing the number of queries from 2018-01 to 2023-07. The y-axis is labeled "Num of Queries" and ranges from 0.0 to 4.5K. The x-axis is labeled "Query Year Month Key".

Configuring Columns Display in Tables

- Select which columns to display/hide according to your needs
- Drag and drop columns to change their order/width

< List of Items Back


The George and Ira Gershwin songbook [sound recording] / [performed by] Ella Fitzgerald. Gershwin, George, 1898-1937. Verve [S.I.] : New York, N.Y. : p1978. >

1 - 1 of 1 Sort routine 0 rows selected Manage Selected

▼ Status : All ▼ Year : All ▼ Volume : All ▼ Description : All ▼ Receive Date : All ▼

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Access Number
1 <input type="checkbox"/>	33550-10	Main Libr...	General	30236	-	-	-	-	No	Item in place	-	-

Material Type
 Item Policy
 Copy ID
 MMS ID
 Provenance
 Storage location ID





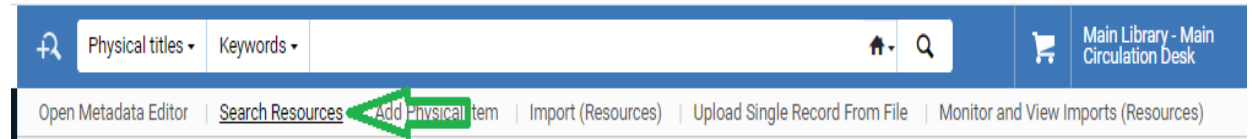
Tools to Increase Efficiency

Configuring Personal Quick Links



Easy access to your commonly used pages

- Dedicated quick links menu
- Dedicated keyboard shortcuts
- Re-order quick links as needed
- Pin quick links menu for single-click buttons



Q Find any link in main menu

Quick links menu

1	Open Metadata Editor	Ctrl+Alt+1
2	Search Resources	Ctrl+Alt+2
3	Add Physical Item	Ctrl+Alt+3
4	Import (Resources)	Ctrl+Alt+4
5	Upload Single Record From File	Ctrl+Alt+5
6	Monitor and View Imports (Resources)	Ctrl+Alt+6

Unpin Quick Links menu

Clear Quick Links menu

Customize main menu links

Collapse menu



Easy access to your commonly used actions

- Define quick actions and re-order as needed
- Pin quick links menu in MDE for single-click buttons

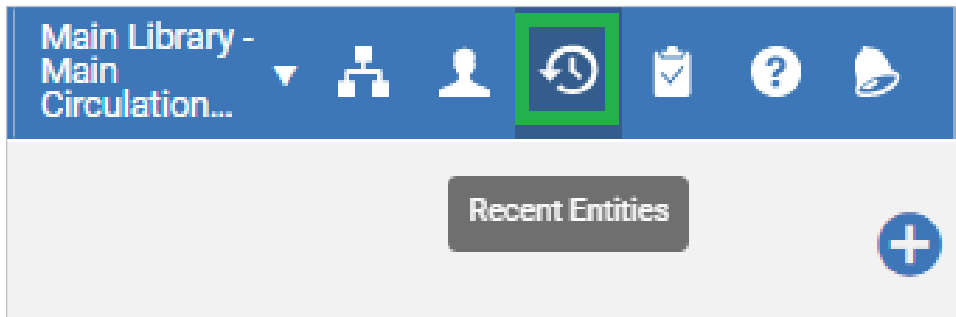
The screenshot shows the Metadata Editor (MDE) interface. The top menu bar includes 'Save', 'New', 'Record', and 'Editing'. Below the menu bar, there are buttons for 'Add Portfolio', 'Add Representation', 'Add Item', and 'Duplicate Record'. The main area displays a list of records with columns for 'LDR' and '01363nam#a22004091##4500'. The 'Add Portfolio' option is highlighted in the 'Records - Quick links menu' panel on the right. The menu items are:

Quick Link	Shortcut
1 Add Portfolio	Ctrl+Shift+1
2 Add Representation	Ctrl+Shift+2
3 Add Item	Ctrl+Shift+3
4 Duplicate Record	Ctrl+Shift+4
5 Derive New Record	Ctrl+Shift+5
6 Search Resources	Ctrl+Shift+6

Below the menu items, there is an 'Unpin Quick links menu' option with a pin icon. At the bottom, there is a note: 'To add or remove a link from the Metadata Editor menu to Quick Links, click the ★ next to it, or navigate to the menu item using the arrow keys and press CTRL+Q'.

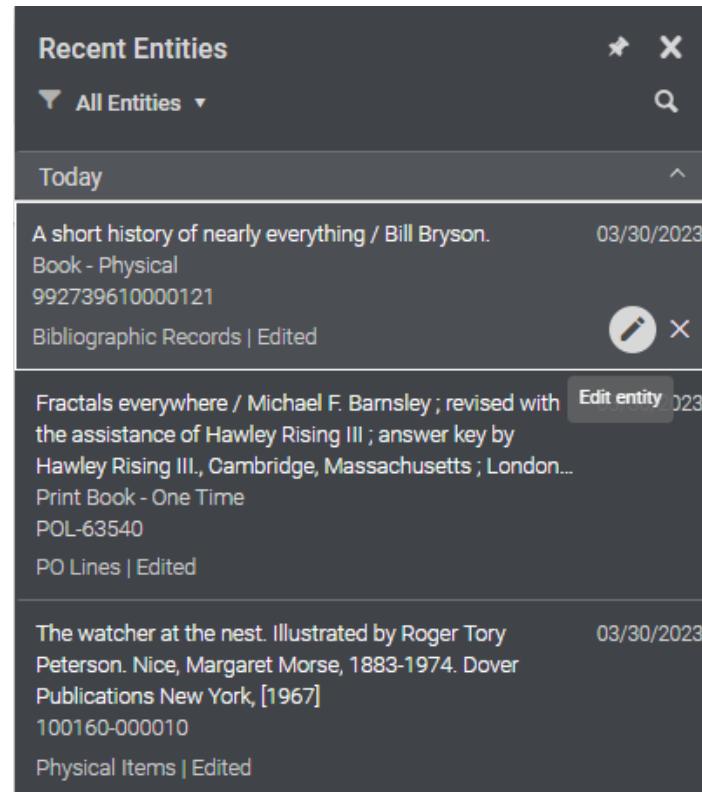
Recent Entities

View and edit your [recently handled entities](#)



Main Library -
Main
Circulation...

Recent Entities



Recent Entities

All Entities

Today

A short history of nearly everything / Bill Bryson. 03/30/2023
Book - Physical
992739610000121
Bibliographic Records | Edited

Fractals everywhere / Michael F. Barnsley ; revised with the assistance of Hawley Rising III ; answer key by Hawley Rising III, Cambridge, Massachusetts ; London... 03/30/2023
Print Book - One Time
POL-63540
PO Lines | Edited

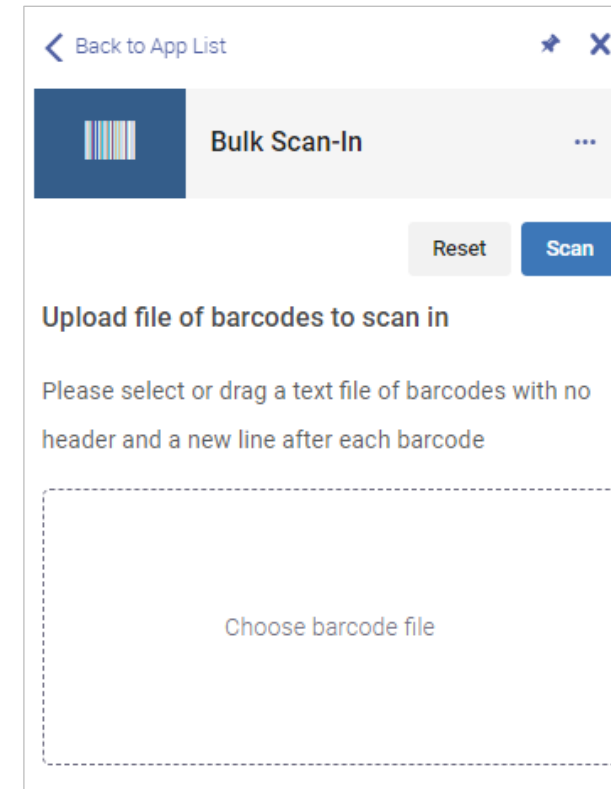
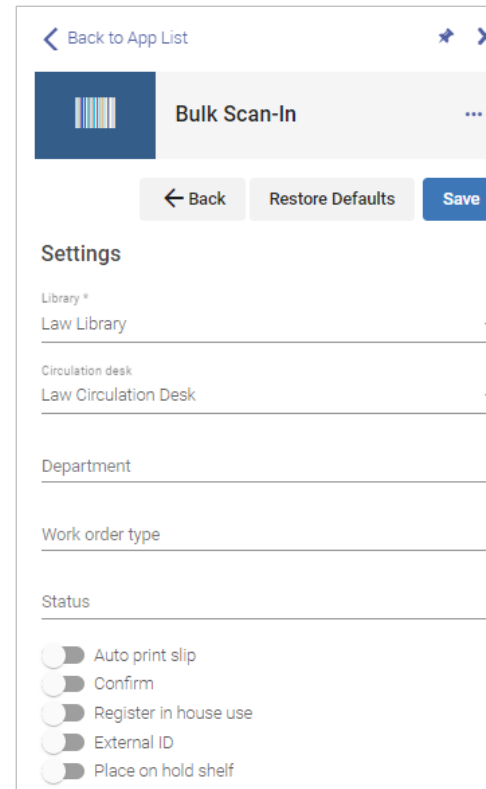
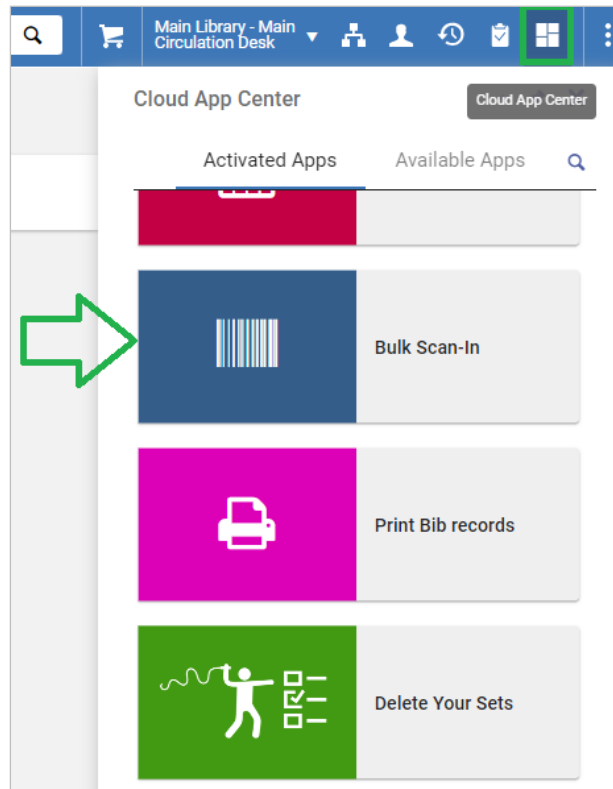
The watcher at the nest. Illustrated by Roger Tory Peterson. Nice, Margaret Morse, 1883-1974. Dover Publications New York, [1967] 03/30/2023
100160-000010
Physical Items | Edited

- Bibliographic records
- Authority records
- Holdings records
- Physical items
- Electronic portfolios
- Electronic collections
- Electronic services
- Digital collections
- Digital representations
- Digital files
- Digital deposits
- Repository sets
- PO lines
- Mapping tables
- Code tables
- Integration profiles

Cloud Apps

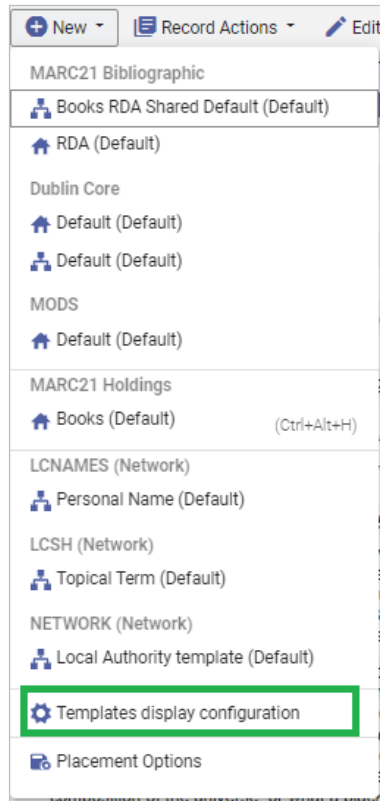
Useful [apps](#) which increase efficiency

E.g., [Bulk Scan In](#): scan in multiple items at a specific desk/department



MDE Templates Display Configuration

Select commonly used templates to display in "New"



Templates display configuration							Save
No.	Template Format	Template Name	Template Origin	Destination	Template Type	Template Status	Display in Menu
1	DC	Default (Default)	🏠	🏠	Shared		<input checked="" type="checkbox"/>
2	DC	Default (Default)	👤	🏠	Shared	🔒	<input checked="" type="checkbox"/>
3	MARC21 Bib	Books RDA Shared Default (Default)	👤	🏠	Shared		<input checked="" type="checkbox"/>
4	MARC21 Bib	RDA (Default)	🏠	🏠	Shared		<input checked="" type="checkbox"/>
5	MODS	Default (Default)	🏠	🏠	Shared	🔒	<input checked="" type="checkbox"/>
6	Holdings	Books (Default)	🏠	🏠	Shared		<input checked="" type="checkbox"/>
7	LCNAMES (Network)	Personal Name (Default)	👤	👤	Shared	🔒	<input checked="" type="checkbox"/>
8	LCSH (Network)	Topical Term (Default)	👤	👤	Shared	🔒	<input checked="" type="checkbox"/>
9	NETWORK (Network)	Local Authority template (Default)	👤	👤	Shared	🔒	<input checked="" type="checkbox"/>
10	MARC21 Bib	Accession	🏠	🏠	Shared		<input type="checkbox"/>
11	MARC21 Bib	Books	🏠	🏠	Shared	🔒	<input type="checkbox"/>



The New UX and What it Can Do for You

Multi-Select Facets

Single click on a single value, or select multiple values and apply

Refine by ^

Activity Status: Active

Clear all

Active Partner ^

Alma ILL Partner (4)

ILLiad (2)

ISO University of ... (1)

+ More (9)

Status ^

Being Processed (3)

Created lending request (14)

Locate failed (1)

+ More (3)

Activity Status ^

Active (31)

Refine by ^

Activity Status: Active

Clear all

Active Partner ^

Alma ILL Partner (4)

ILLiad (2)

ISO University of ... (1)

+ More (9)

Status ^

Being Processed (3)

Created lending ... (14)

Locate failed (1)

+ More (3)

Apply

Move Between Search Results

Use the up/down arrows to move to previous/next item, in full view or split-screen

The screenshot displays a library catalog interface with search results and navigation options. The main view shows a list of items, with the first item selected and its details expanded. The interface includes a sidebar with navigation options, a top navigation bar with various actions, and a main content area with item details and a list of related items.

Navigation Bar: Assign to Me, Assign to, Change Bib Reference, Cancel Line, Relink, Save as Template, Change Vendor, Edit, Next Item (highlighted with a green box).

Item 5: 0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery., c1999., 0946846243, ISBN
PO line owner: O'Neill
Vendor/Account: Automation Vendor/Automation_Vendor/Auto Vendor Account description/AutomationVendorAcc
Funds: _23072023Fund_Name (100.0%) (FY-2024)
200.22 USD
Print Book - One Time Sent Alerts (8)
Add Label
PO line: 24-544398 / PO: PO-4593777 (Sent)

Item 6: 1,000 ideas for graffiti and street art / Cristian Campos., Beverly, M...
PO line: PC
PO: PC
1 of 16

Navigation Bar (Right): Assign to Me, Assign to, Edit, Previous Item (highlighted with a green box).

Item 6 (Right): 0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery., c1999., 0946846243, ISBN
PO line owner: O'Neill
Vendor/Account: Automation Vendor/Automation_Vendor/Auto Vendor Account description/AutomationVendorAcc
Funds: _23072023Fund_Name (100.0%) (FY-2024)
200.22 USD
Print Book - One Time Sent Alerts (8)
Add Label
PO line: 24-544398 / PO: PO-4593777 (Sent)

Add Labels to Easily Identify Items Requiring Work

- Add your own labels as needed
- Facet by your label to fetch only labeled entities

The screenshot displays a web interface for managing lending requests. On the left, a 'Refine by' sidebar includes filters for 'Activity Status' (Active), 'Labels' (Check with Hadas), 'Active Partner' (Alma ILL Partner, ILLiad, ISO University of ...), 'Status' (Being Processed, Created lending ..., Locate failed), and 'Activity Status' (Active). The main content area, titled 'Lending Requests (1 - 20 of 31)', shows a list of three items. The second item, 'The sermon by Smith, Jimmy', is highlighted with a blue box. A green box highlights the 'Check with Hadas' button for the first and third items. The interface also includes search, sort, and action options.

Item ID	Title	Author	Requested	Created	External Identifier	Material Type	Assigned to	Label
1	On organizational learning /	Argyris, Chris, My New Partner	Book (Physical)	10/11/2015 12:53	ex9	Physical	Barry Bingham	Check with Hadas
2	The sermon	Smith, Jimmy Waikiki Beach University, Hawaii	Book (Physical)	09/06/2015 12:57	618	Physical	Chris Parson	
3	Water /	Open University	Book (Physical)	11/15/2022 06:05	EXL:DEMO3_1//EXLDEV1000520 0	Physical	Ex Libris Staff	Check with Hadas

Make Some Changes Directly from Search Results

Add notes, receive item directly from POL, etc.

The screenshot displays a web application interface for managing a Purchase Order (PO) line. On the left is a sidebar with navigation options: PO Line Summary, PO Line Information *, Ordered Items *(1), Pricing and Funding *, Receiving Information, Interested Users, Vendor Information, Reporting Codes, Notes, Bib Description, Invoice Lines (1), Associated PO Li... (4), Communications, and History (42). The main content area features a table with columns: Libra..., Loca..., Call ..., Barc..., Avail..., Item ..., Item ..., and Rece... The table contains one row with the following data: 1, O'..., Sta... (ST..., BC..., No Rec. A context menu is open over the first row, offering 'Edit', 'Receive', and 'Delete' options. Below the table is a '+ Add Items' button. Further down, there are sections for 'Pricing and Funding' and 'Receiving Information' with checkboxes for 'Rush', 'Routing during receiving', and 'Binding during receiving'. The top of the interface includes buttons for 'Assign to Me', 'Assign to', 'Cancel', and 'Save'.

Libra...	Loca...	Call ...	Barc...	Avail...	Item ...	Item ...	Rece...
1	O'...	Sta... (ST...	BC...	No Rec			

Assign Multiple POs

The screenshot displays a web interface for managing Purchase Order Lines. At the top, it shows 'Purchase Order Lines (1 - 20 of 1,122,453)'. Below this, there are navigation and action buttons: 'Sort by: Title', 'Create New PO', 'Change Expected Date', 'Manage Labels', and 'Assign Selected'. A status bar indicates '2 rows selected' and 'Clear Selection'. Two rows are visible in the list:

- Row 1: Checked, icon, '<>., 2014, PO line: 15-302904 PO: PO-250830 (Closed) Vendor/Account: GIFTS/GIFT T/Default Account/GIFT 1 Physical - One Time Closed 0.00 USD'. Includes a warning icon and an edit icon.
- Row 2: Checked, icon, '<>., Qingdao ;, China Ocean University Press, 2008., 9787811251258, IS... PO line: 15-311044 PO: PO-253622 (Closed) Vendor/Account: GIFTS/GIFT T/Default Account/GIFT 1 Physical - One Time Closed 0.00 USD'. Includes a warning icon and an edit icon.

A modal dialog titled 'Choose action to apply :' is open over the list. It contains three radio button options: 'Assign to Me' (selected), 'Release Assignment', and 'Assign to'. A blue button labeled 'Assign to selected' is at the bottom of the dialog. Below the dialog, a 'Sections' sidebar is visible with a scroll bar. The main content area below the dialog shows a section for 'PO line: 15-302904 / PO: PO-250830 (Closed)' and a 'PO Line Information' section.

Choose What You See Where

Configuring the display of actions, sections, brief results and responsive mode

Print Slip Actions

User customization

- Details sections customization
- Actions customization
- Record customization

Record customization

Main Columns

First Column
Use this column for primary data. It will always be displayed.

- 1 Title
- 2 Author
- 3 Borrower
- 4 Status

Second Column
Use this column for secondary data data. It will not be displayed in narrow list.

- 1 Requested Format
- 2 Create Date
- 3 Due Date
- 4 External Identifier
- 5 Inventory Type
- 6 Assignee

Badges and Icons

Third Column
This column contains badges and indications. It will be displayed as icons in narrow lists.

- Labels
- Notes And Messages
- Alerts

Apply

Sections Customization

Display sections

- 1 General information
- 2 Notes
- 3 Request form (as filled by requester)
- 4 Request information
- 5 Fulfillment request information
- 6 General messages
- 7 Alerts
- 8 Pod information
- 9 Holdings

Hide sections

Drag sections here to hide them

Reset to default

Responsive Screen Mode

Responsive Screen Mode gives you a simple way to view content in low resolution screens, and will disable split screen. Facets and Summary sections will hover over main content.



Thank You!

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