CU NY — THE CITY UNIVERSITY OF NEW YORK

Welcome to IGeLU

Copenhagen, Denmark – 10 September, 2024

I Didn't Know You Could Do That in Alma!

Kristen Fredericksen

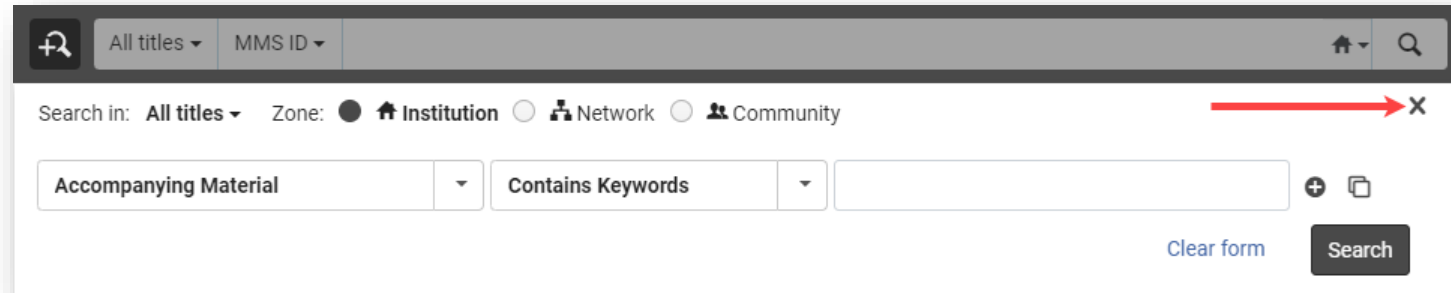# Agenda

Alma
- Interface
- Acquisitions
- Fulfillment
- Resources

Alma adjacent
- Analytics
- Primo VE

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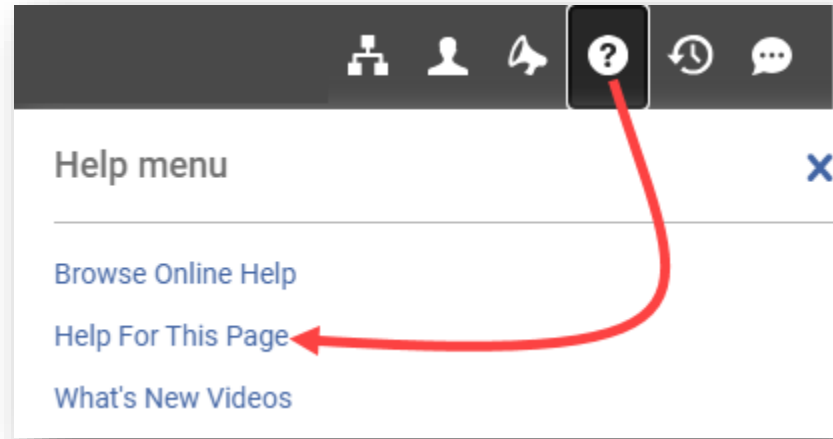# Interface

Click out of advanced search

- There's a small button that closes advanced search. You don't have to refresh the page to exit.

Interface
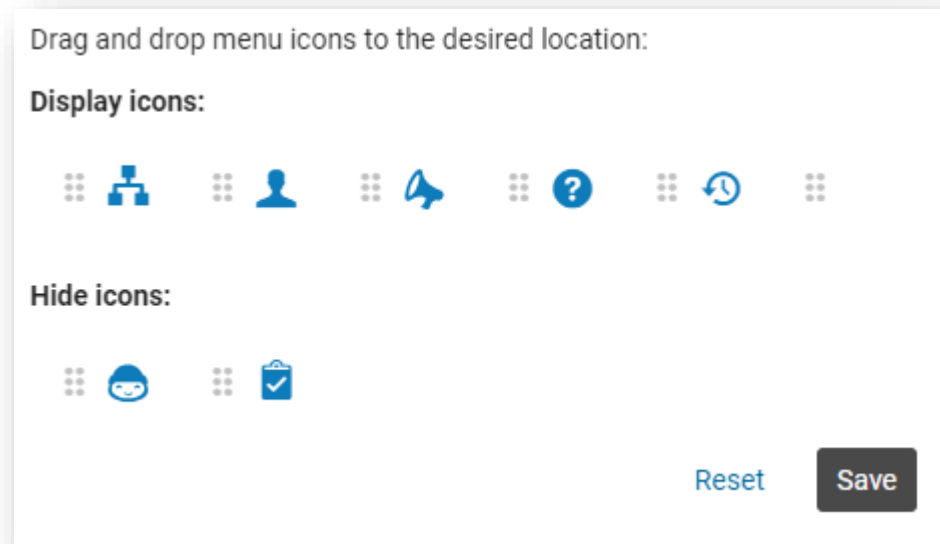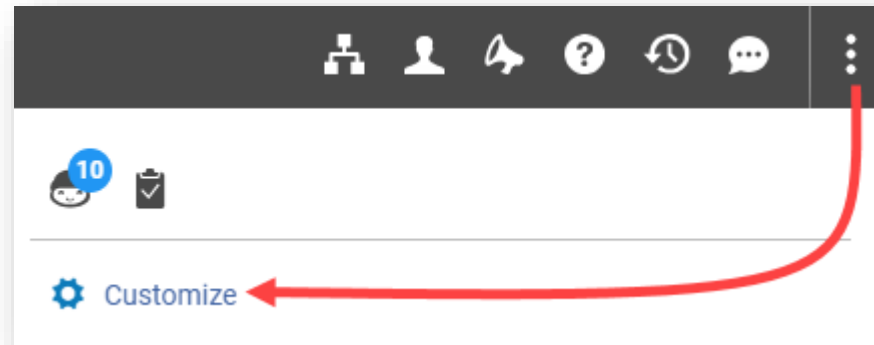
Help For This Page

- This menu item will send you to a documentation page relevant to your current Alma screen. The link goes to a different help page depending on where you are in Alma.
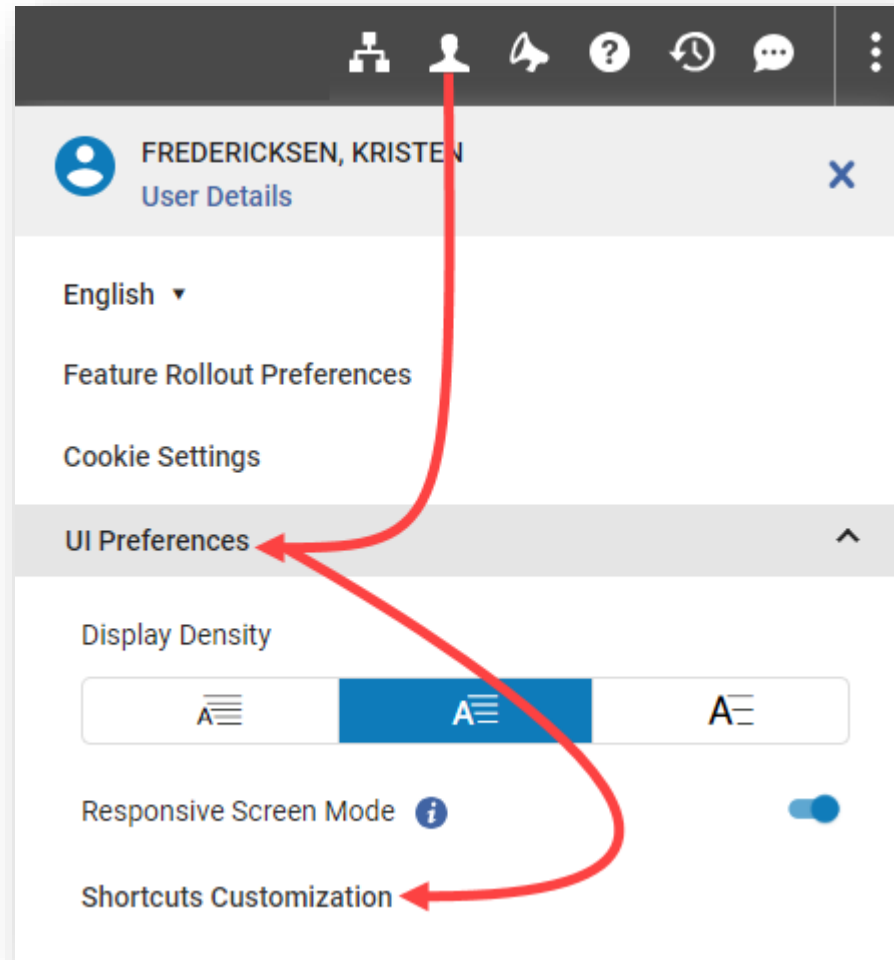
Interface

Hide icons

- Declutter your menu by hiding the icons you rarely use. They will still be available with an extra click.
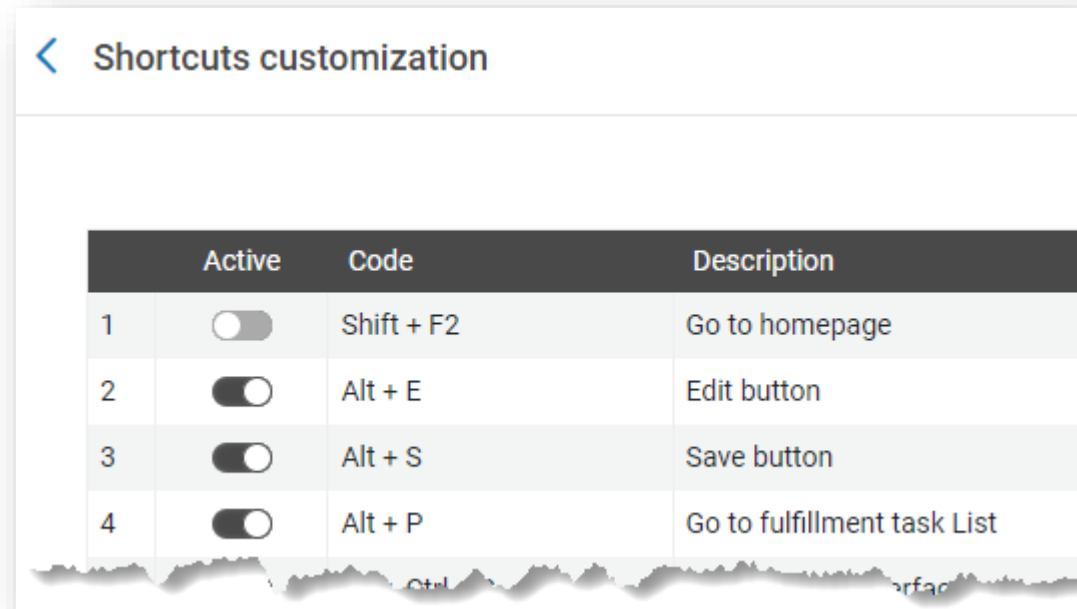
Interface

Hot keys

- Enable or disable keyboard shortcuts. You may want to enable them to reduce mouse clicking. You may want to disable them if other programs are already using them.

- Ex Libris documentation: Global Alma Hot Keys

Interface

Hot keys (continued)

	Active	Code	Description
1		Shift + F2	Go to homepage
2		Alt + E	Edit button
3		Alt + S	Save button
4		Alt + P	Go to fulfillment task List

Interface

Jump to page

- There's a small box where you can type a page number. You don't have to scroll to the bottom of the page.
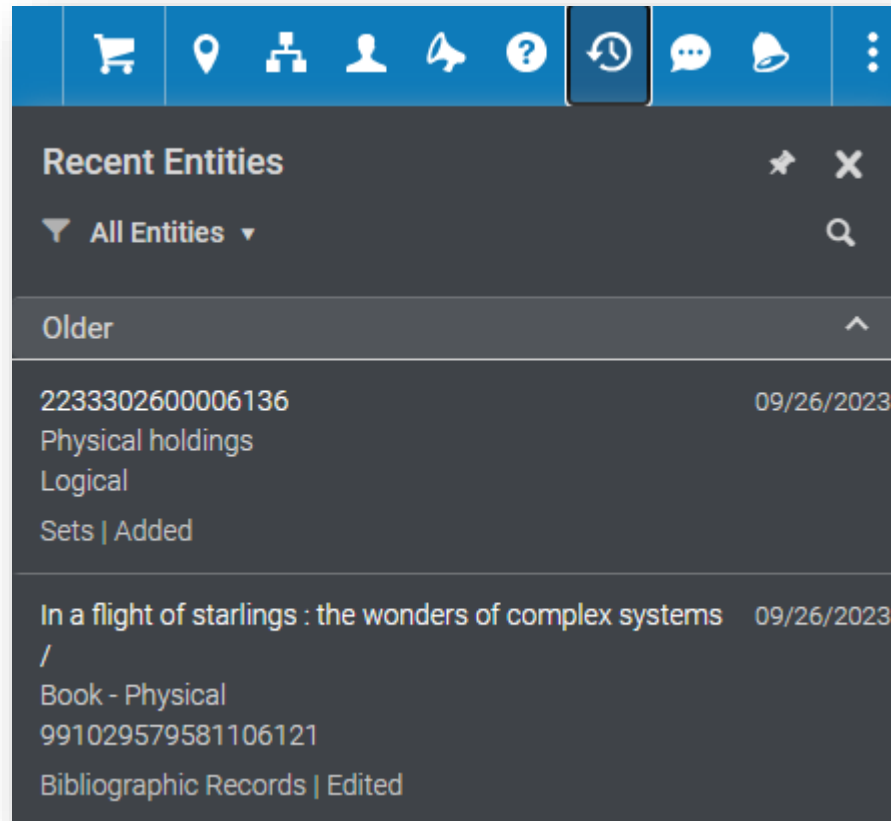
Video
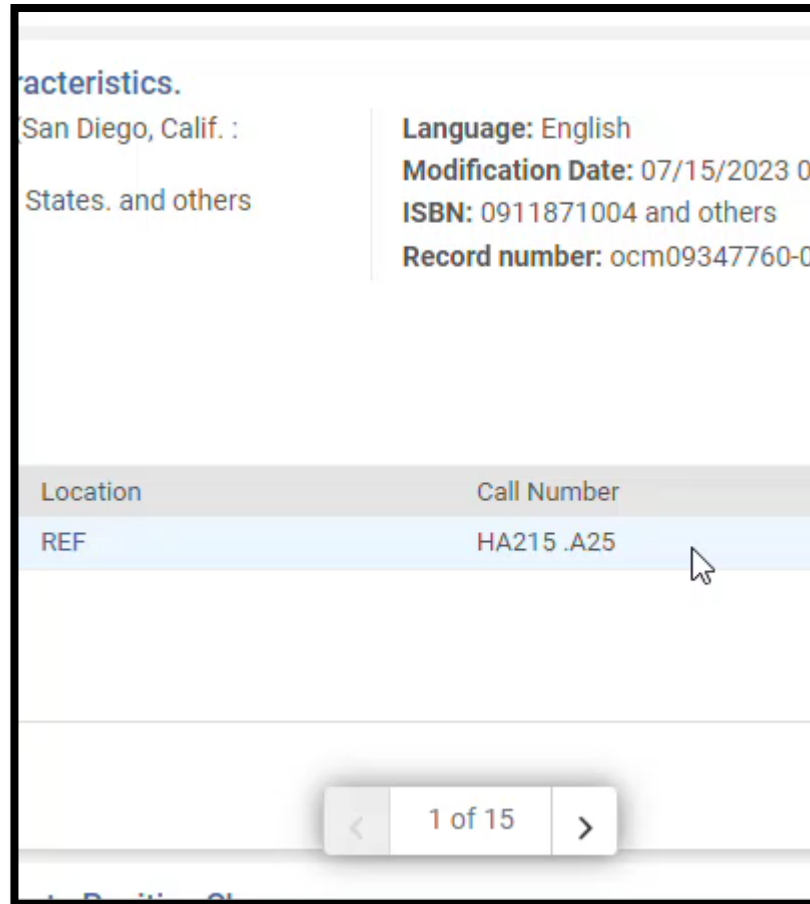
Interface

Recent entities

- View bib records; holdings; items; electronic portfolios, services, and collections; and other things that you worked on within the last 14 days.

- What you can view depends on your role.

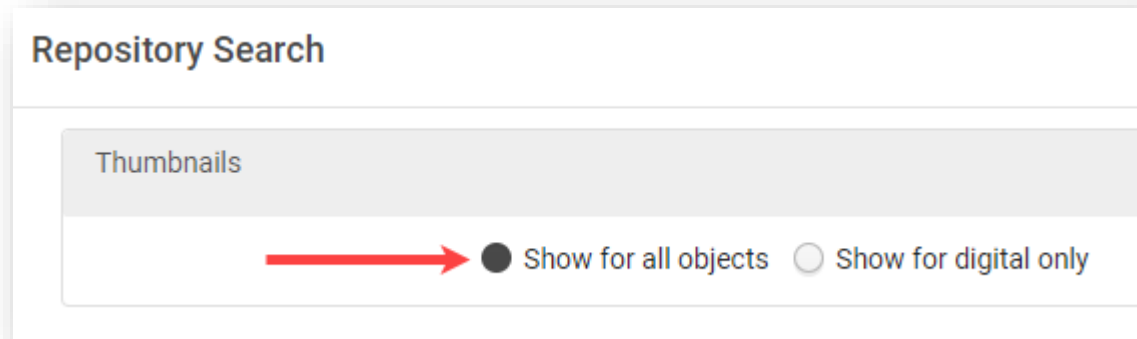- Ex Libris documentation: Recent Entities List
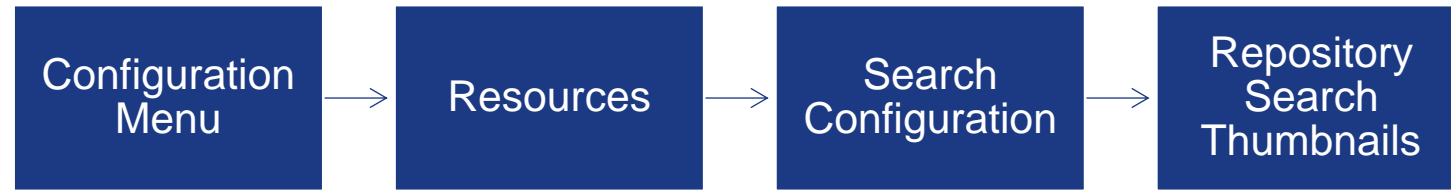
Interface
Sandbox link

- Go directly from Alma production to your sandbox.

- An administrator *may* need to configure it, but anyone with an Alma role can use it.
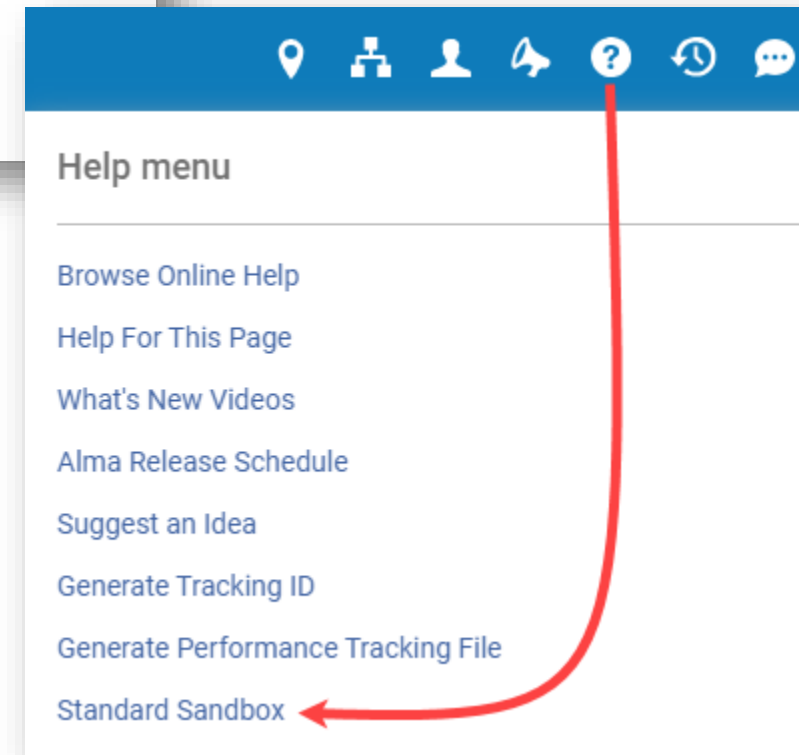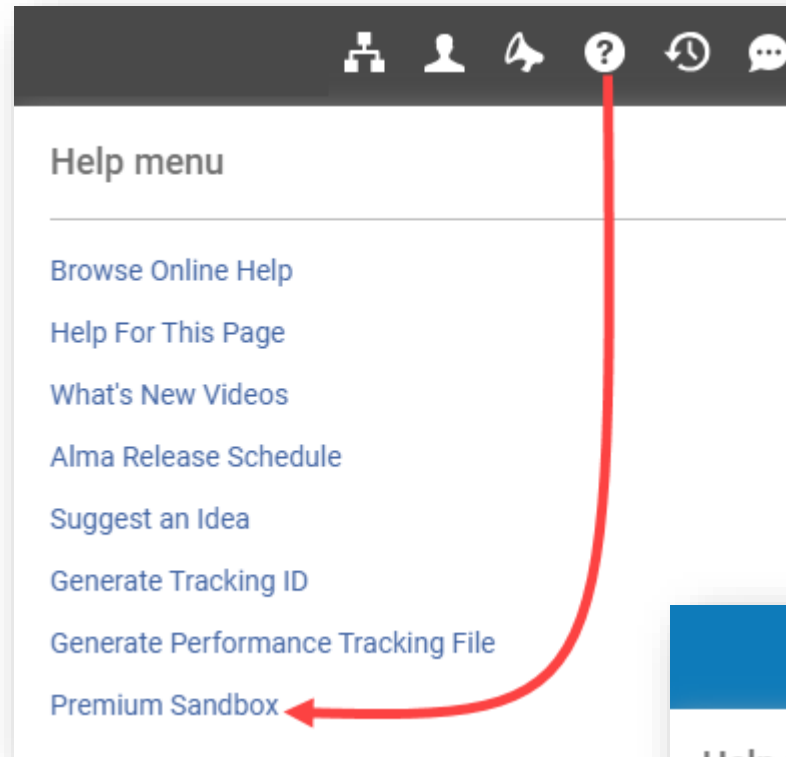
Interface
Thumbnails (Alma)

- Display a thumbnail or generic image for every title in Alma search results.

- Catalog Administrator must configure it, but anyone with an Alma role must use it.

- Ex Libris documentation: Customizing the Thumbnail Display

Acquisitions

Auto package PO lines on demand

- Run the job to package PO lines outside its scheduled time.

- Run by Acquisitions Administrator or General System Administrator.

- Ex Libris documentation: Scheduled Jobs: PO Line Packaging

Configuration Menu → Acquisitions → Other → Acquisitions Jobs Configuration
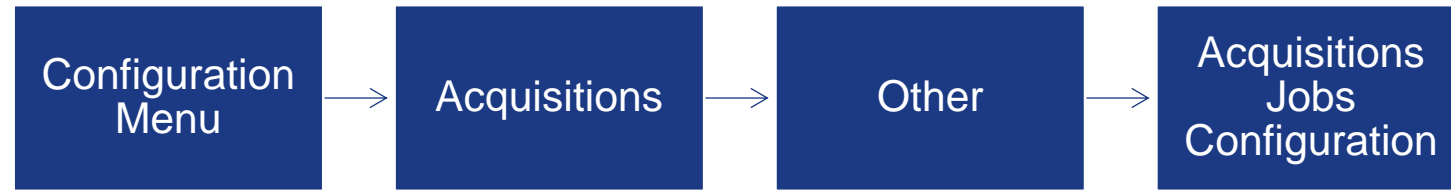
Acquisition Jobs Configuration

PO Line package job

| Status | ● Active ○ Inactive |
PO Line continuous limit *	1
PO Line one time limit *	100
Package PO Line by Fund	☐
Schedule	Every day at 17:00 ▾

Run Now

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Acquisitions
Change vendor

- Change the vendor in a sent order without reopening it or running a job on a set.

- Ex Libris video: Change Vendor of a Purchase Order

Production Menu → Acquisitions → Advanced Tools → Change Vendor In Order
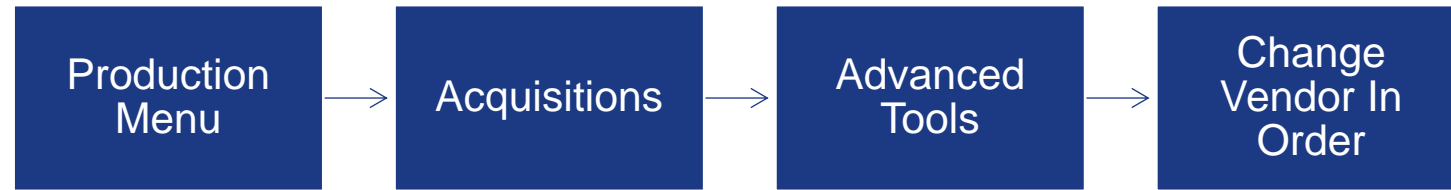
Add Job

Source Vendor/Account *	
Target Vendor/Account *	
PO	
Send orders to new vendor	● Do not send (keep status of the PO/POL) ○ Send
Send cancellation to source vendor	☐

Add   Close   Add and Close

Acquisitions
Ledger Creation Details

- The "i" button displays who created the ledger and when they created it.

- Available for Ledger Manager and Fund-Ledger Viewer (view only).

Acquisitions

Relink closed POLs

- Clean up records, inventory, and acquisitions data by relinking. Change the filter to "All" to include closed POLs.

- Available to various roles.

- Ex Libris documentation: Closing, Reopening, and Relinking PO Lines
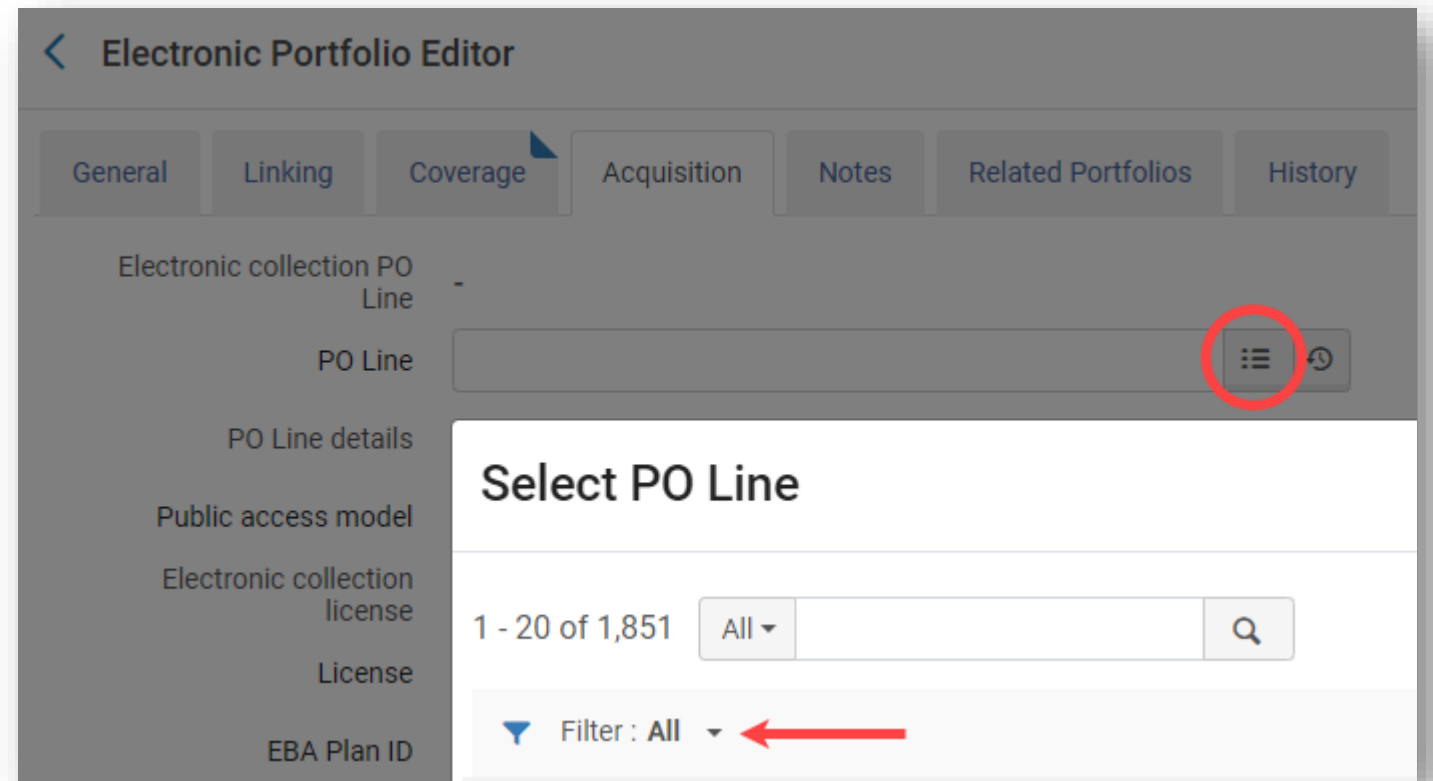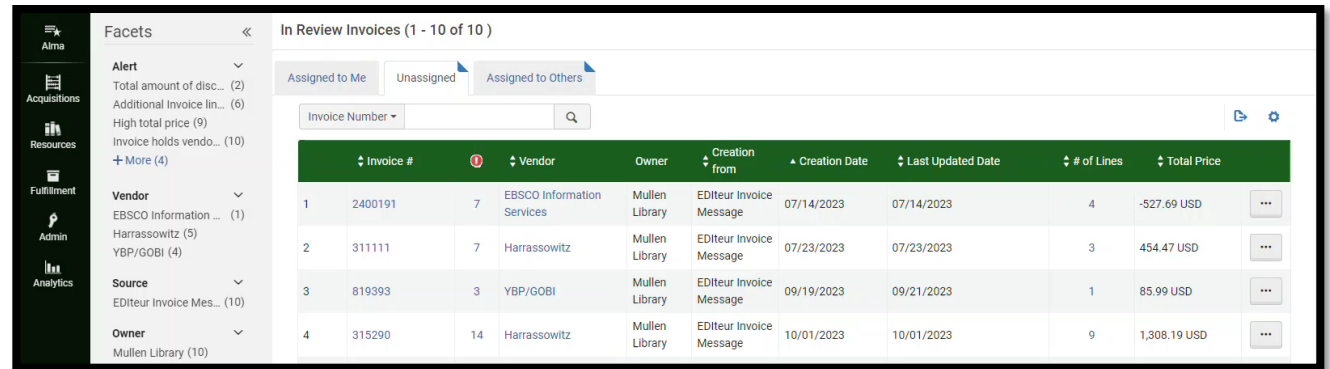
Acquisitions

Reload EDI invoices

- There's a button in the invoice that allows you to reload the EDI file. This is useful if you want to link purchase order lines or undo errors.

- Ex Libris documentation: Working with EDI Files

Video

Acquisitions

Reopen previous fiscal period

- Post purchase order lines and invoices to previous fiscal years by reopening the fiscal period.

- You may need to reactivate the old ledger.

- Configured by Acquisitions Administrator or General System Administrator.

Configuration Menu → Acquisitions → General → Fund and Ledger Fiscal Period
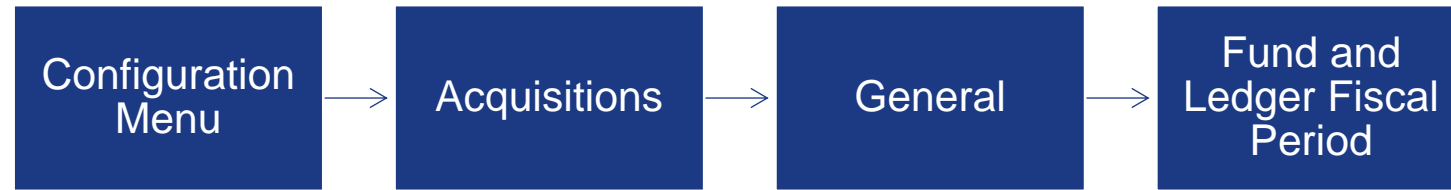
FY-2022	07/01/2021	06/30/2022	Active ←
FY-2023	07/01/2022	06/30/2023	Active ←
FY-2024	07/01/2023	06/30/2024	Active

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Fulfillment

Attach to request

- Attach a specific item of a multivolume set to a patron request. This is needed when a request was placed on the title level and there are multiple items available.

Existing holdings requests may be fulfillable by scanned in item. Use action button in list to choose requests to attach.

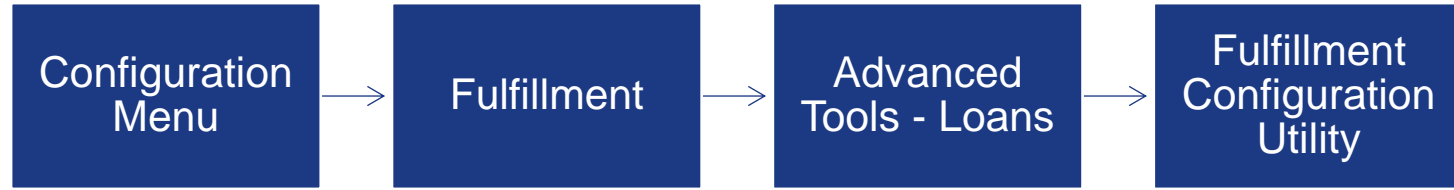| Requester ID	Place in Queue	Checked In	
-	0		...

Edit Item

Print Slip

Work Order

Cancel Request

→ Attach to request

View hidden

Fulfillment

Fulfillment Configuration Utility

- Check how an item will behave without checking it out to a patron. This will ensure that your loan statistics remain accurate.

- Available to various roles.

- Ex Libris documentation: Fulfillment Configuration Utility

Fulfillment

Patron has institutional record

- Create a short patron record that will be overlaid by an external patron system (e.g., SIS).

- Ex Libris documentation: [Registering Patrons](#)

Fulfillment
Scan in messages

- Choose which alerts appear and how they appear when items are scanned in.

- Configured by General System Administrator or Fulfillment Administrator.

- Ex Libris documentation: How To Configure Scan-In Alerts

Configuration Menu → Fulfillment → Physical Fulfillment → Scan In Messages Configuration
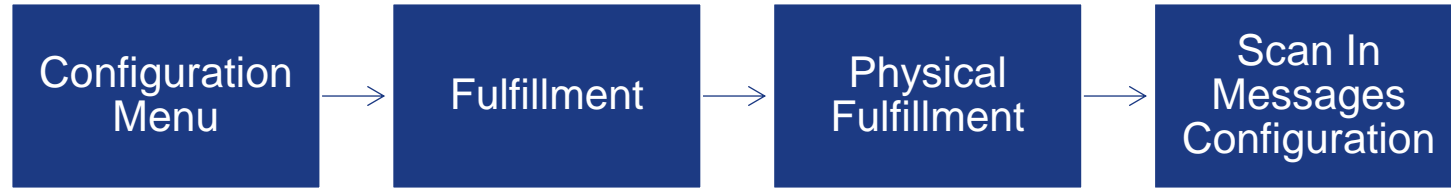
Mapping Table

| Values | Notes |

Show message ▾ [   ] 🔍

	Type	Show message	'Cancel' available at popup
1	Acquisition note	Popup message ▾	Yes
2	Claimed returned	Feedback message ▾	No
3	Complete lending request	None ▾	Yes
4	Fulfillment note	Popup message ▾	Yes

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Resources

Controlled Vocabulary Registry

- Suggest common words and phrases in bibliographic records. Save staff time and reduce errors from manual typing.

- Configured by Catalog Administrator or General System Administrator

- Ex Libris Documentation: Configuring Controlled Vocabulary Registry

Resources

Controlled Vocabulary Registry (continued)

1. Create the controlled vocabulary.
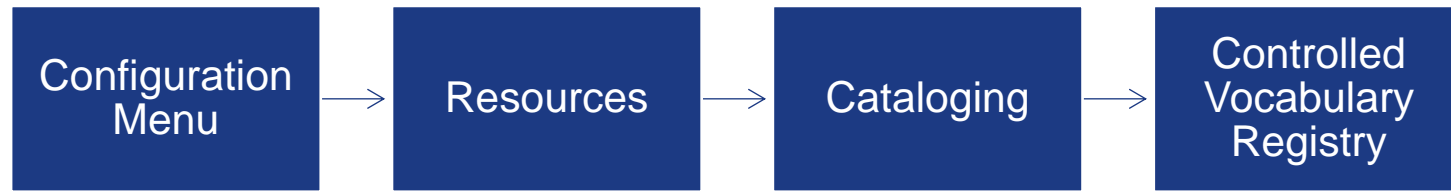
< **Controlled Vocabulary Details**   Back

Name | **KB 591A**

Description | **591 $a for Kingsborough**

1 - 9 of 9

	▲ Code	Description
1	21-22 Textbook	2122TEXTBOOK
2	22-23 Required Film	2223REQUIREDFILM
3	22-23 Textbook	2223TEXTBOOK
4	23-24 Required Film	2324REQUIREDFILM
5	23-24 Textbook	2324TEXTBOOK
6	24-25 Required Film	2425REQUIREDFILM
7	24-25 Textbook	2425TEXTBOOK
8	25-26 Required Film	2526REQUIREDFILM
9	25-26 Textbook	2526TEXTBOOK

Resources

Controlled Vocabulary Registry (continued)

2. Assign the controlled vocabulary to a MARC subfield.

Resources
Merge and combine - manual

- Merge duplicate bib records and attach inventory to new combined record.

- Can be used by:
  - Catalog Administrator
  - Catalog Manager
  - General System Administrator

- Ex Libris documentation: Using Merge Records and Combine Inventory

Metadata Editor → Record Actions → Merge & Combine
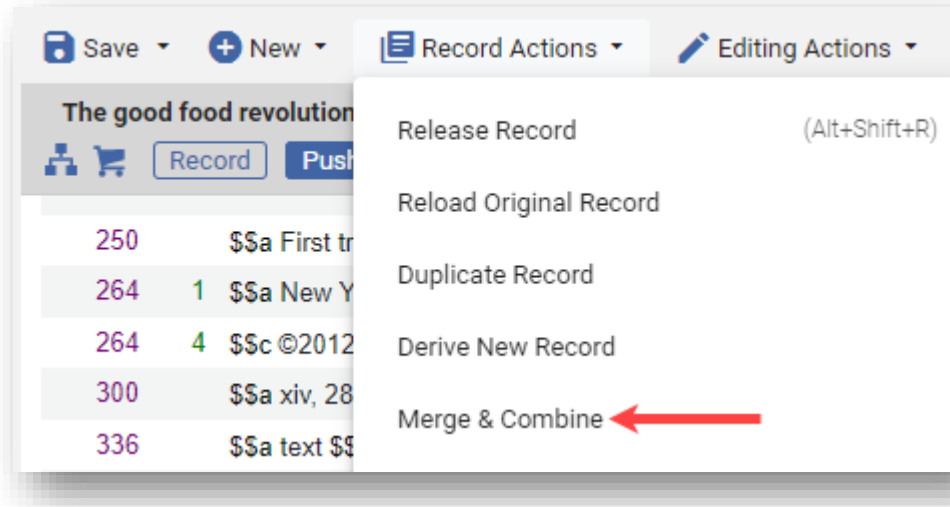
Resources

Merge and combine - job

- Merge duplicate bib records and attach inventory to new combined record.

- Can be used by:
  - Catalog Administrator
  - Catalog Manager
  - General System Administrator

- Ex Libris documentation: [Using Merge Records and Combine Inventory](#)

Production Menu → Resources → Advanced Tools → Merge Record and Combine Inventory
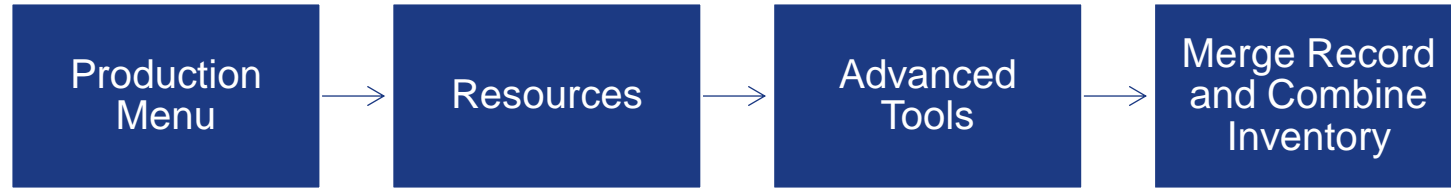
Merge Records and Combine Inventory

Field	Value
Job Name	Merge Records and Combine Inventory - 10/09/2023 08:33:11 PM
Input File *	
Choose merge routine	
Secondary record:	● Delete
	○ Suppress
	○ Keep it
Update holdings call number	☐

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Resources

Metadata Editor - Open Form Editor

- Display possible values for MARC 21 fixed fields so you don't have to consult a manual.

- Can be used by:
  - Cataloger
  - Catalog Manager
  - Catalog Administrator

- Ex Libris documentation: Open Form Editor

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Resources

Metadata Editor – Quick links

- Create links to most-used menu items above the Metadata Editor.

- Can be used by:
  - Cataloger
  - Catalog Manager
  - Catalog Administrator

- Ex Libris documentation: Personalized Quick Links to Favorite Actions

Video
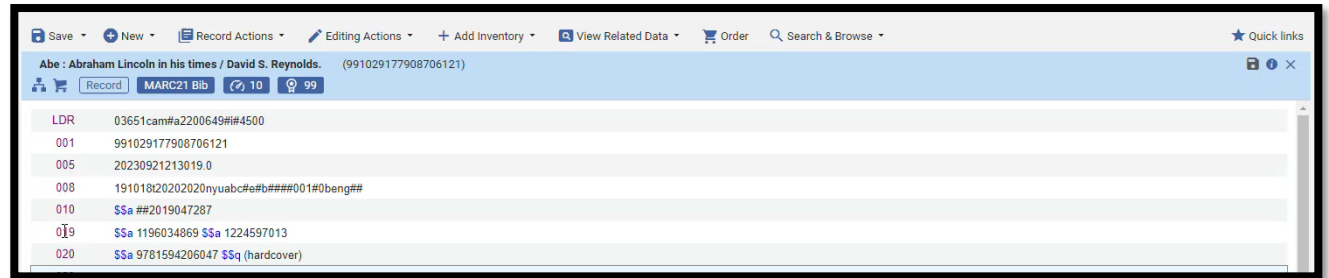
Primo VE
Reindex records

- Run the "Recalculate Local Resource Types Job" on a set to reindex a group of records without Ex Libris intervention.

- Run by Discovery – Admin.

Production Menu	→	Admin	→	Manage Jobs and Sets	→	Run a Job
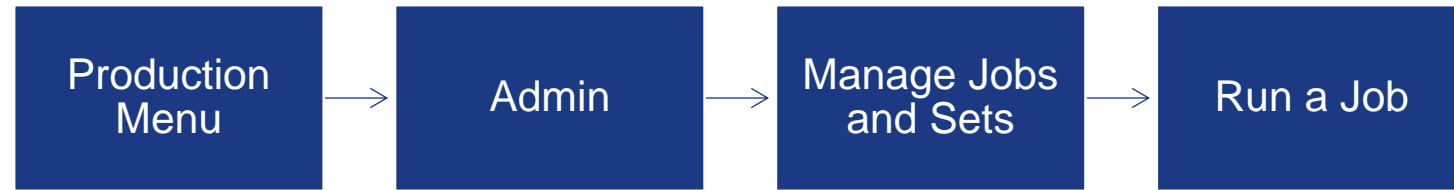
Resources
Sort physical items (Alma)

- Change the way physical items are sorted in Alma. Sort by chronology, enumeration, library, location, and more.

- Configured by various roles.

- Ex Libris documentation: Configuring Physical Item Sort Routines

Configuration Menu	→	Resources	→	General	→	Physical Item Sort Routines
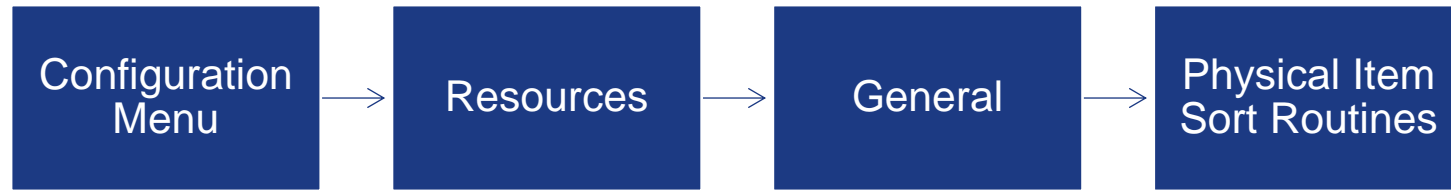
< **Sort Routine Details**

General information	Conditions selection	Display Options

Name **Description**

Description **Sort according to item description**

Routine order

Order ○ Ascending Order ● Descending Order
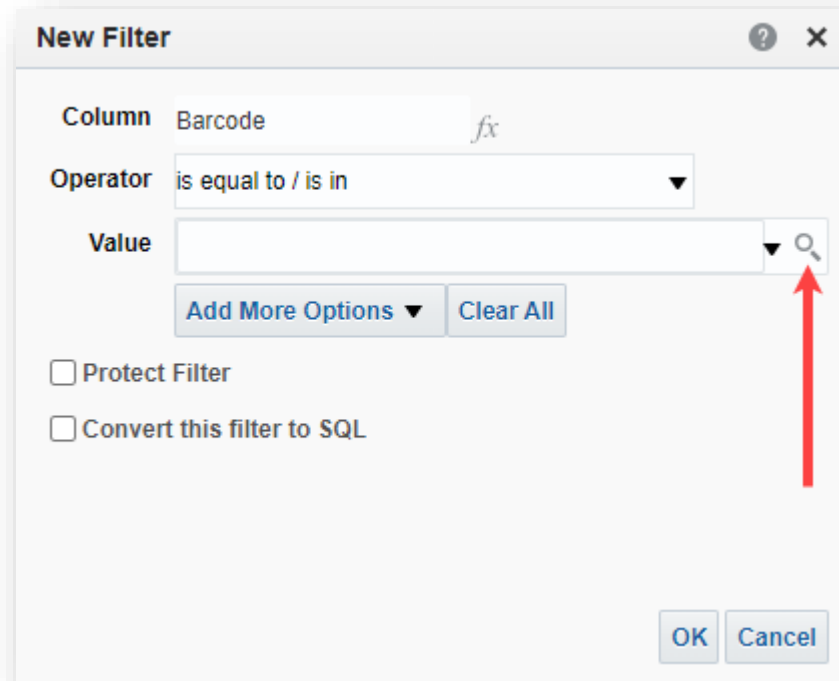
Sorts selected

	Sort name	Description
1	Description	The item description

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Analytics

Filter in bulk

- Copy large columns of data, such as barcodes or patron names, into a filter without reformatting it.
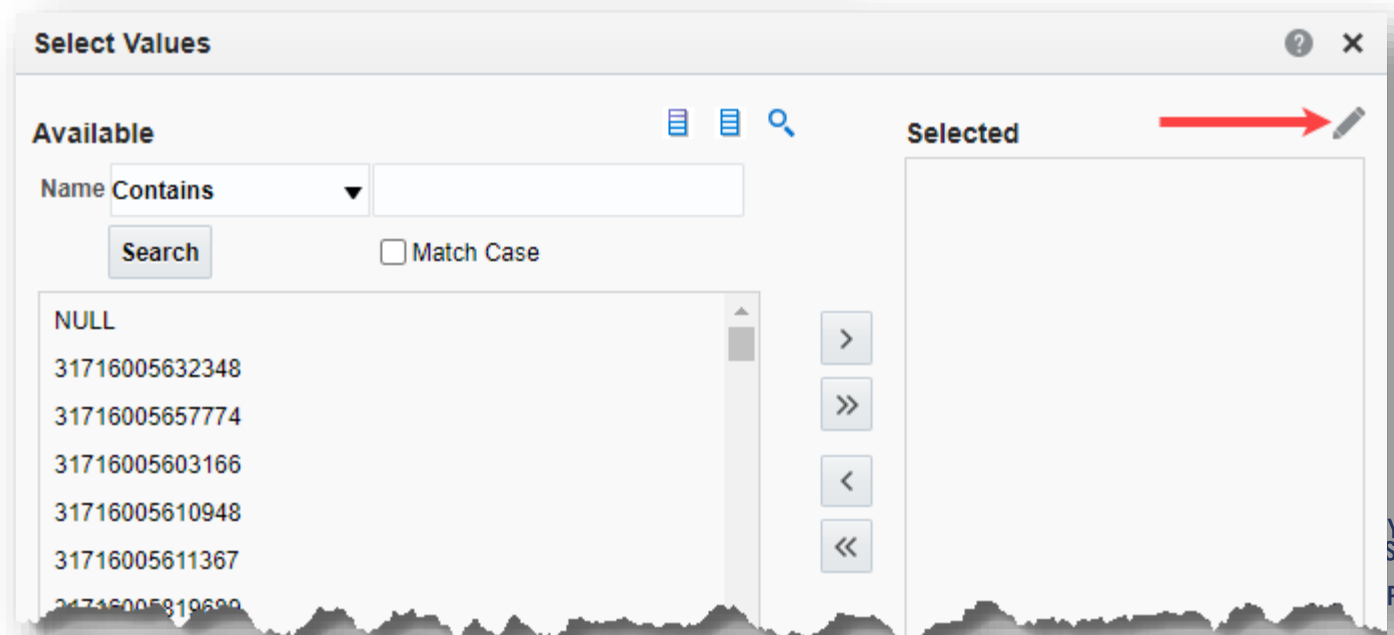
Analytics
Preferences

- Set your default location, language, time zone, and more in Alma Analytics. Change the default sort order and choose how edited analyses open.

Analytics → My Profile → My Account → Preferences

My Account

User ID: HE_1042068570006143_6143_D_na07.alma.exlibrisgroup.com
Display Name: HE_1042068570006143_6143_D_na07.alma.exlibrisgroup.com

| Preferences | Publisher Preferences | Mobile Preferences | Delivery Options | Application Roles |

Starting Page: Default

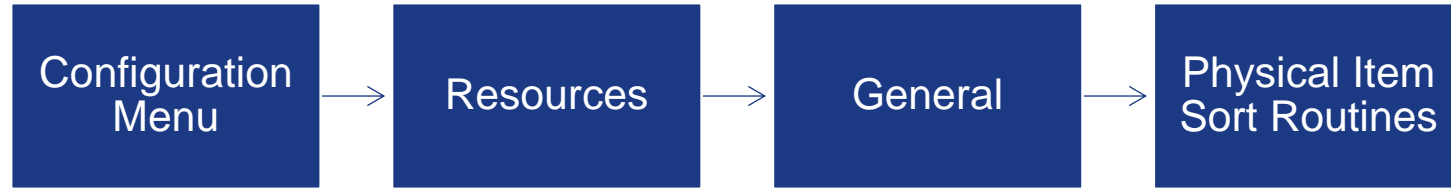Locale (location): Default - English - United States

User Interface Language: Default - English

Time Zone: Default - Unknown Time Zone

Currency: Ledger Currency

Subject Area Sort Order: Sort A to Z

Prompts Auto-Complete: ● Default ○ On ○ Off

Analysis Editor: ● Full Editor Start on Criteria tab when editing Analysis
○ Wizard (limited functionality)

Accessibility Mode: ● Default ○ On ○ Off

Primo VE

Sort physical items

- Change the way physical items are sorted in Primo VE. Sort by chronology, enumeration, library, location, and more.

- Configured by various roles.

- Ex Libris documentation: Configuring the Sort Order of Physical Items in Primo VE

Primo VE
Thumbnails

- Display thumbnail images in Primo VE. Requires a link in the bibliographic record.

- Configured by Discovery - Admin.

- Ex Libris documentation: Configuring Thumbnail Templates for Primo VE

Configuration Menu → Discovery → Display Configuration → Thumbnail configuration
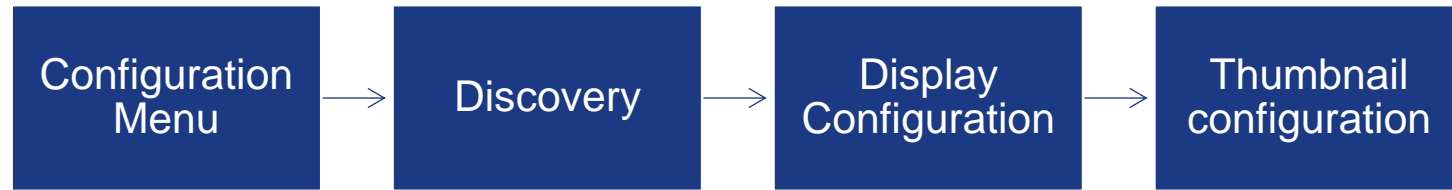
Define Thumbnail Link

Thumbnail Details

| Template Name | Kanopy 856 42 $u | | Template | $$LinkingParameter1 |

LinkingParameter Configuration

| Field * | 856 | Ind1 | 4 | Ind2 | 2 | Subfield * | u |

Use Field: Matching string using a regular expr

Field Pattern: https:\/\/www\.kanopy(streaming)?\.com

Normalization: No normalization
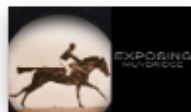
VIDEO

Exposing Muybridge.
Shaffer, Marc, film director.; Oldman, Gary, actor.; Gravitas Ventures (Firm); Ka
2021
Available online (Coverage: Until 2024)

Questions?
Comments?

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