## THE CITY UNDERSITY OF NEW YORK

Welcome to IGeLU Copenhagen, Denmark – 10 September, 2024

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





#### Alma

- Interface
- Acquisitions
- Fulfillment
- Resources

#### Alma adjacent

- Analytics
- Primo VE



## 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.

All titles - MMS ID -				<b>#</b> ▼ Q
Search in: All titles - Zone: 🌒 🕇	Finstitution 🔿 🖧 Network 🔿 🎗 C	Community		×
Accompanying Material	Contains Keywords	•		•
			Clear form	Search



## Interface Help For This Page

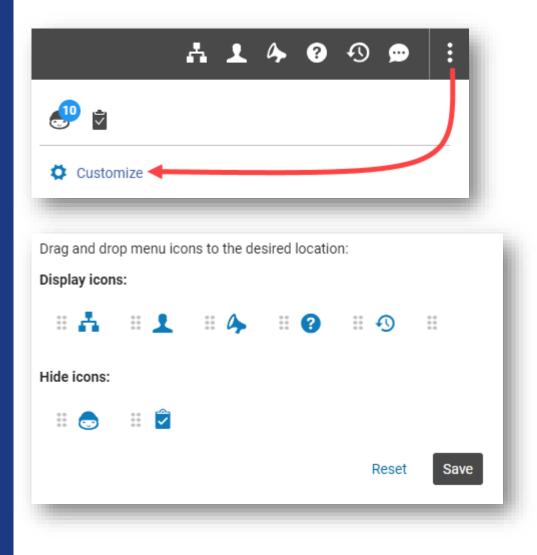
 This menu item will send you to a documentation page relevant to your current Alma screen. The link goes to a different help page depending on where you are in Alma.

	Å	Ŧ	4	?	Ð	ø
Help menu						×
Browse Online Help					)	
Help For This Page						
What's New Videos						



## **Interface** Hide icons

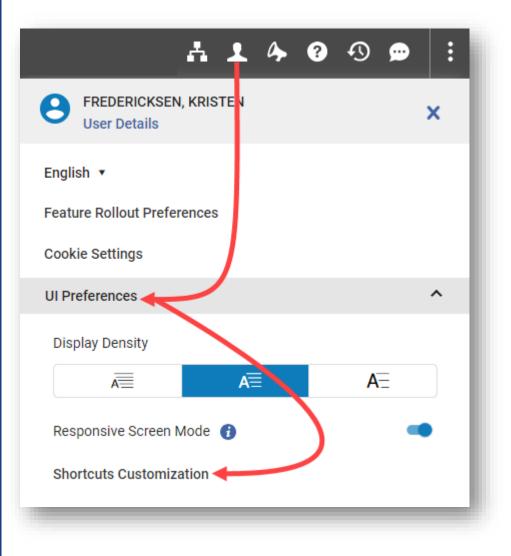
 Declutter your menu by hiding the icons you rarely use. They will still be available with an extra click.





## 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: <u>Global Alma Hot Keys</u>





### Interface Hot keys (continued)

#### Shortcuts customization < Code Description Active Shift + F2 Go to homepage Alt + E Edit button 2 Alt + S Save button 3 Alt + P Go to fulfillment task List 4 rfac Ctol .



## 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.

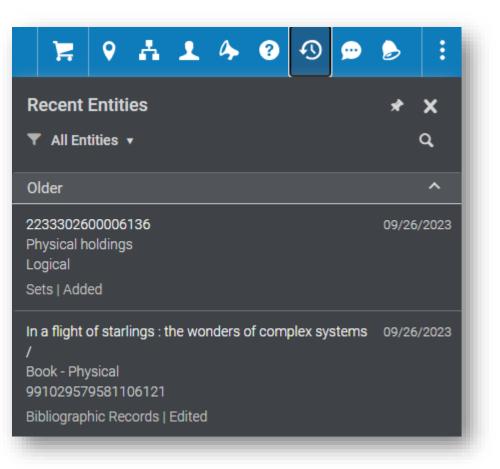
#### Video

<b>acteristics.</b> [San Diego, Calif. : States. and others	Language: English Modification Date: 07/15/2023 04 ISBN: 0911871004 and others Record number: ocm09347760-01
Location	Call Number
REF	HA215 .A25
	45
	< 1 of 15 >



## 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: <u>Recent Entities List</u>





## 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.

ሐደፉ 🛙	• • • • • • • • • • • • • • • • • • •
Help menu	
Browse Online Help	
Help For This Page	
What's New Videos	
Alma Release Schedule	
Suggest an Idea	
Generate Tracking ID	
Generate Performance Tracking File	9 🛔 1 /  /  9 😗 🗩
Premium Sandbox	
	Help menu
	Browse Online Help
	Help For This Page

What's New Videos

Suggest an Idea

Generate Tracking ID

Standard Sandbox

Generate Performance Tracking File

Alma Release Schedule

## 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:
   <u>Customizing the</u>
   Thumbnail Display

Configur Ment	$\stackrel{\text{ation}}{\rightarrow}$ Resources	$\rightarrow$ Search Configuration	→ Repository Search Thumbnails
Repository	Search		
Thumbna	ils		
	Show for all	objects 🔵 Show for digital only	
_			
1 -	The Philadelphia country house : architecture a Book (Book - Electronic) text; computer; online resou (Baltimore, Maryland : Johns Hopkins University Press Subject: Country homes-Pennsylvania-Philadelphia Region-H homes-Landscape architecture-History-Pennsylvani century. and others Creation Date: 12/12/2015 10:57:58 AM Modification Date: 08/08/2023 08:19:28 AM Electronic (1)	Irce By Reinberger, Mark, s, 2015.) Region-History-17th century. Iistory-18th century. Country	
	Interface Name	Collection Name Ebook Central: CUNY Collection (Ebook Central	Service Type
	Ebook Central	Perpetual, DDA and Subscription Titles)	Full Text

## 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: <u>Scheduled Jobs: PO</u> Line Packaging

 $\begin{array}{c|c} \text{Configuration} \\ \text{Menu} \end{array} \rightarrow & \text{Acquisitions} \end{array} \rightarrow & \text{Other} \end{array} \rightarrow & \begin{array}{c} \text{Acquisitions} \\ \text{Jobs} \\ \text{Configuration} \end{array}$ 

cquisition Jobs C	onfiguration	
PO Line package jo	b	
Status	Active	
PO Line continuous limit *	1	
PO Line one time limit *	100	
Package PO Line by Fund		1
Schedule	Every day at 17:00 -	Run Now



## Acquisitions Change vendor

- Change the vendor in a sent order without reopening it or running a job on a set.
- Ex Libris video: <u>Change</u> <u>Vendor of a Purchase</u> <u>Order</u>

Production Menu	→ Acquisiti	ons —>	Advanced Tools	$\rightarrow$ V	Change endor In Order
Add Job					
Vendor/Account *					:=
Vendor/Account *					:=
Send orders to new vendor Do	not send (keep status of the	PO/POL) 🔵 Send			
Send cancellation to source vendor					



### 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).

Productic Menu	$\rightarrow$ Acquisitions	→ Acquisit Infrastru	tions
			Deactivate Cancel Save
		Created by	System X
		Created on	07/03/2024 11:53:40 AM
		Last updated by	System
		Last updated on	07/03/2024 11:53:40 AM
		Last updated by	3604592360006142
Code *	GENERAL_LEDGER	job	
			Ledger - Open New Fiscal
Owned by *	Queensborough Community Colleg	je	Period
			•



## 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: <u>Closing, Reopening, and</u> <u>Relinking PO Lines</u>

< Electronic Portfolio Ed	litor
General Linking Cov	verage Acquisition Notes Related Portfolios History
Electronic collection PO Line	
PO Line	(≡)⊘
PO Line details	Select PO Line
Public access model	Select PO Line
Electronic collection license License	1 - 20 of 1,851 All - Q
	🍸 Filter : All 👻 🚤
EBA Plan ID	



## 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: <u>Working with EDI Files</u>

#### Video

	Facets «	In Revie	w Invoices (1 - 10	of 10)								
itions	Alert Total amount of disc (2) Additional Invoice lin (6) High total price (9)	Assigne	d to Me Unassign ice Number 🕶	ied A	ssigned to Others							G (
nces Î	Invoice holds vendo (10) + More (4)		\$ Invoice #	0	\$ Vendor	Owner	Creation from	Creation Date	\$ Last Updated Date	\$ # of Lines	Total Price	
ent	Vendor EBSCO Information (1)	1	2400191	7	EBSCO Information Services	Mullen Library	EDIteur Invoice Message	07/14/2023	07/14/2023	4	-527.69 USD	
ı	Harrassowitz (5) YBP/GOBI (4)	2	311111	7	Harrassowitz	Mullen Library	EDIteur Invoice Message	07/23/2023	07/23/2023	3	454.47 USD	
25	Source ~ EDIteur Invoice Mes (10)	3	819393	3	YBP/GOBI	Mullen Library	EDIteur Invoice Message	09/19/2023	09/21/2023	1	85.99 USD	
	Owner  V Mullen Library (10)	4	315290	14	Harrassowitz	Mullen Library	EDIteur Invoice Message	10/01/2023	10/01/2023	9	1,308.19 USD	•••



## Acquisitions Reopen previous fiscal period

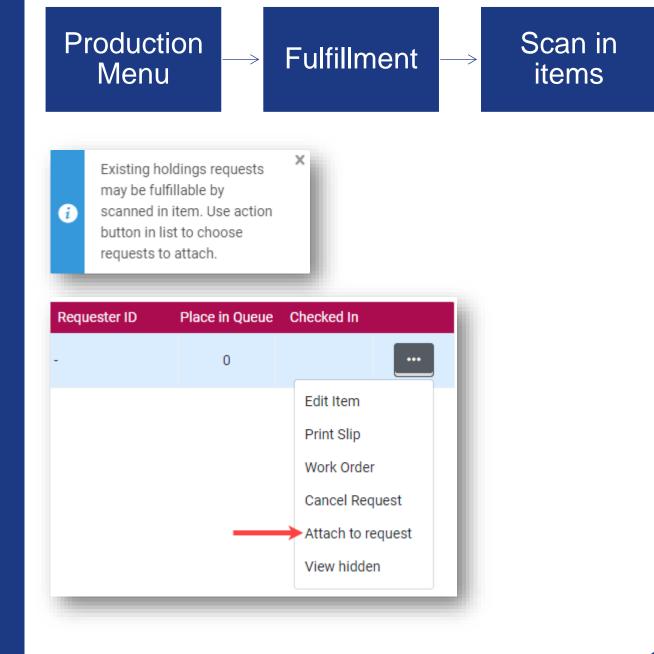
- Post purchase order lines and invoices to previous fiscal years by reopening the fiscal period.
- You may need to reactivate the old ledger.
- Configured by Acquisitions Administrator or General System Administrator.





## **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.

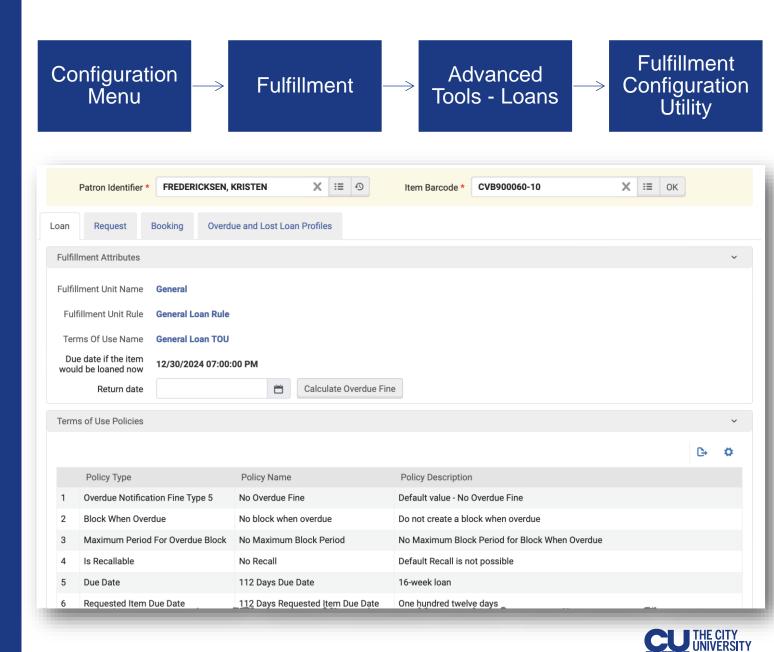




## Fulfillment

### 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:
   <u>Fulfillment Configuration</u>
   <u>Utility</u>



## 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:
   <u>Registering Patrons</u>

Production Menu $\longrightarrow$ Fu	Ifillment $\longrightarrow$ Check	kout/Checkin →	Manage Patron Services →	Register New User
USER MANAGEMENT INF	ORMATION			
Patron has institutional record Password	🕒 No 🔵 Yes			
Verify password				
Force password change on next login				
USER MANAGEMENT INF	ORMATION			
Patron has institutional record	🔵 No 🌑 Yes	Owning system	CUNYfirst	•
Force password change on next login		Match ID Type	Primary Identifier	



## **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

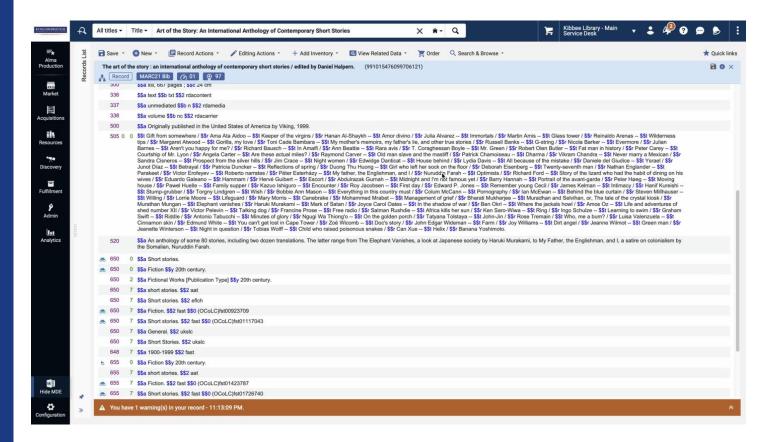
 $\begin{array}{ccc} \text{Configuration} \\ \text{Menu} \end{array} \xrightarrow{} & \text{Fulfillment} \end{array} \xrightarrow{} & \begin{array}{c} \text{Physical} \\ \text{Fulfillment} \end{array} \xrightarrow{} & \begin{array}{c} \text{Scan In} \\ \text{Messages} \\ \text{Configuration} \end{array}$ 

ping Table			
lues Notes			
Show message -	Q		
Туре	Show message		'Cancel' available at popup
1 Acquisition note	Popup message	•	Yes
2 Claimed returned	Feedback message	•	No
3 Complete lending request	None	•	Yes
	Popup message		Yes



### 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: <u>Configuring Controlled</u> <u>Vocabulary Registry</u>





#### Controlled Vocabulary Registry (continued)

1. Create the controlled vocabulary.

	iguration $\longrightarrow$ Resources $\longrightarrow$	Cataloging $\rightarrow$ Vo	ontrolled ocabulary Registry
< Cor	trolled Vocabulary Details		Back
	Name KB 591A		
	Description 591 \$a for Kingsborough		
1 - 9	of 9	C	⇒ ¢
	▲ 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	

#### Controlled Vocabulary Registry (continued)

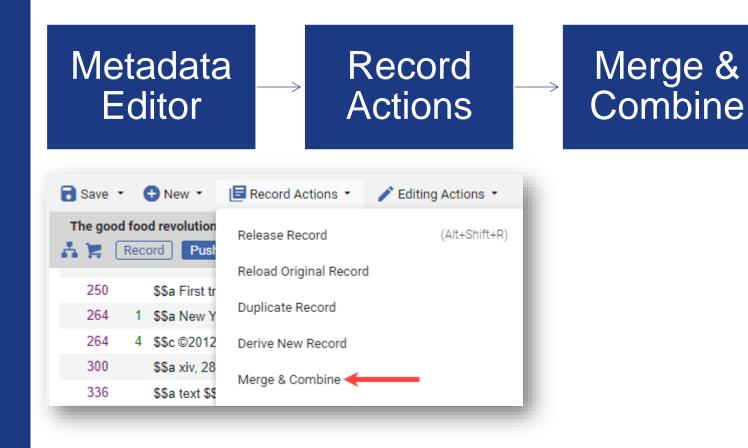
2. Assign the controlled vocabulary to a MARC subfield.

Configuratior Menu	ightarrow Resources $ ightarrow$	Cataloging $\rightarrow$ Metadata $\rightarrow$ MARC21 Configuration $\rightarrow$ Bibliographic
MARC21 Bibliogra	phic	
Family	MARC21	Type Bibliographic
Usage	BIB_MMS	
Tag	591	Type Variable
Repeatable	Yes	
Mandatory	🔾 Yes 🛑 No	
Description	LOCAL NOTE	
Help URL		
Subfields		~
1 - 20 of 36		D> <b>Φ</b>
SubField	Description	Mandatory Repeatable Controlled Vocabulary
1 0	Local note	No • Yes • - ···
11 a	Local note	No Yes ·
12 b	Local note	No   Yes  Assign Controlled Vocabulary



# 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:
   <u>Using Merge Records</u>
   <u>and Combine Inventory</u>





# Merge and combine - job

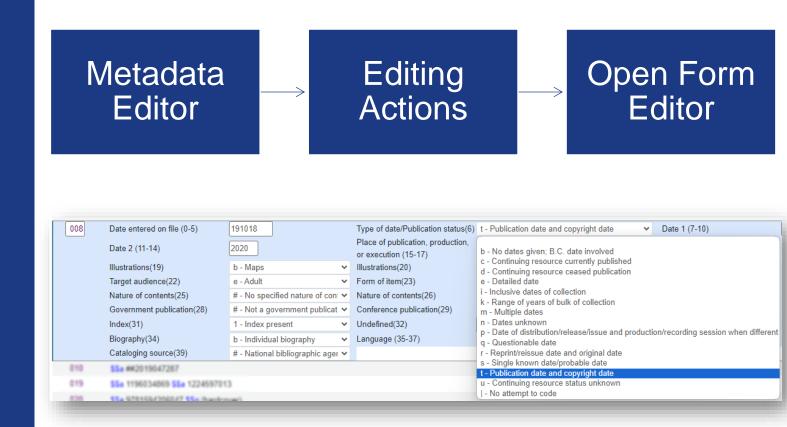
- Merge duplicate bib records and attach inventory to new combined record.
- Can be used by:
  - Catalog Administrator
  - Catalog Manager
  - General System Administrator
- Ex Libris documentation: <u>Using Merge Records</u> and Combine Inventory

Production Menu →	$\begin{array}{c} \text{Resources} & \longrightarrow & \begin{array}{c} \text{Advanced} \\ \text{Tools} & \longrightarrow & \begin{array}{c} \text{Merge Re} \\ \text{and Com} \\ \text{Inventore} \end{array}$	nbin
Merge Records and Comb	bine Inventory	
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		



#### 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:
   <u>Open Form Editor</u>





#### Metadata Editor – Quick links

- Create links to mostused menu items above the Metadata Editor.
- Can be used by:
  - Cataloger
  - Catalog Manager
  - Catalog Administrator
- Ex Libris documentation:
   <u>Personalized Quick</u>
   Links to Favorite Actions

#### Video

B Save	🔹 😌 New 🔹 📄 Record Actions 🔹 🥕 Editing Actions 🔹 🕂 Add Inventory 🔹 💽 View Related Data 🍨 🏋 Order 🔍 Search & Browse 🔹	★ Quick links
-	braham Lincoln in his times / David S. Reynolds. (991029177908706121) Record MARC21 Bib (7) 10 9 99	<b>B</b> 0 ×
LDR	03651cam#a2200649###4500	
001	991029177908706121	
005	20230921213019.0	
008	191018i2020200nyuabc######001#0beng##	
010	\$\$a ##2019047287	
019	\$\$a 1196034869 \$\$a 1224597013	
020	\$\$a 9781594206047 \$\$q (hardcover)	
_		



## 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.

 $\begin{array}{ccc} \text{Production} \\ \text{Menu} \end{array} \longrightarrow & \text{Admin} \end{array} \longrightarrow & \begin{array}{c} \text{Manage Jobs} \\ \text{and Sets} \end{array} \longrightarrow & \begin{array}{c} \text{Run a Job} \end{array}$ 



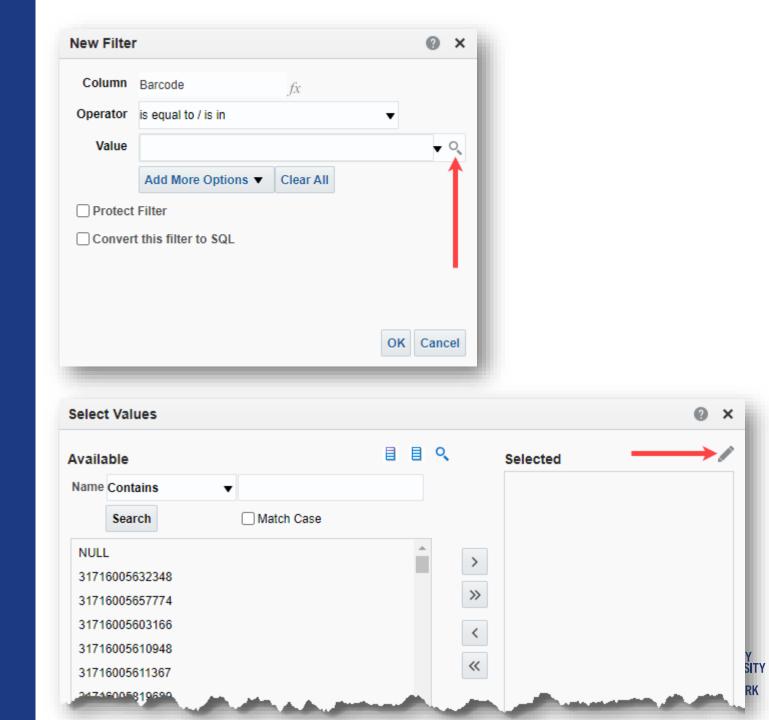
# Sort physical items (Alma)

- Change the way physical items are sorted in Alma.
   Sort by chronology, enumeration, library, location, and more.
- Configured by various roles.
- Ex Libris documentation: <u>Configuring Physical Item</u> <u>Sort Routines</u>

$\begin{array}{c} \text{Configuration} \\ \text{Menu} \end{array} \rightarrow & \text{Resources} \end{array} \rightarrow & \text{General} \end{array}$	Physical Item Sort Routines						
< Sort Routine Details							
General information Conditions selection Display Options							
NameDescriptionDescriptionSort according to item description							
Routine order							
Order 💿 Ascending Order 🔵 Descending Order							
Sorts selected							
Sort name	Description						
1 Description	The item description						

## **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.

My Account Analytics My Profile Preferences  $\rightarrow$  $\rightarrow$  $\rightarrow$ 

ly Account							
	042068570006143_6143_D_na HE_1042068570006143_6143	07.alma.exlibrisgroup.com _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	<ul> <li>Full Editor Start on Criteria tab when editing Analysis</li> </ul>					
	Accessibility Mode	<ul> <li>Wizard (limited functionality)</li> <li>Default On Off</li> </ul>					



## 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:
   <u>Configuring the Sort</u>
   Order of Physical Items
   in Primo VE

Con I	figurati Menu	on	> Resou	rces →	General	$\rightarrow$	Physical Item Sort Routines
Sor	t Routine	Details					
Genera	al informatio	n Con	ditions selection	Display Options			
		Name	Chronology & Enu	meration for Primo V	E		
	De	escription	Sort by chronology	y (year) and then enu	meration in descendi	ng order in Prir	no VE only.
Rout	tine order						
		Order	O Ascending O	order 🔵 Descendin	) Order		
Sort	s selected						
			Sort name			Description	
1		•	Enumeration C (p	art)		Enumeration	C
2		•	Enumeration A (v	olume)		Enumeration	A
3		•	Enumeration B (is	ssue)		Enumeration	
4			Chronology I (yea	r)		Chronology I	THE CITY UNIVERSIT OF NEW YOR

## **Primo VE** Thumbnails

- Display thumbnail images in Primo VE. Requires a link in the bibliographic record.
- Configured by Discovery - Admin.
- Ex Libris documentation: <u>Configuring Thumbnail</u> <u>Templates for Primo VE</u>

Configur Men	ration u	→ D	iscover	y —>	Со	Display nfiguration	$\rightarrow$	Thumbnail configuration
< Define Thum	ıbnail Link							
Thumbnail Detail	ls							
Те	mplate Name	Kanopy 856 42	\$u				Template	\$\$LinkingParameter1
LinkingParamete	er Configuration							
Field *	856	Ind1	4	Ind2	2	Subfield *	u	
Use Field	Matching strin	ng using a regular	ехрі 👻					
Field Pattern	https:\/\/www	\.kanopy(stream	ng)?\.con					
Normalization	No normalizat	ion	•					



#### VIDEO

#### Exposing Muybridge.

Shaffer, Marc, film director.; Oldman, Gary, actor.; Gravitas Ventures (Firm); Ka 2021

#### Questions? Comments?

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