

# Personalization: Get the most out of Alma & Primo

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# Personalization

**Tailoring a service to accommodate specific individuals or organizations to improve satisfaction, productivity, and efficiency**

<https://en.wikipedia.org/wiki/Personalization>



# Personalization in the Age of COVID

- We're always asked to do more with less
- Remote work requires more efficiency and productivity
- Satisfaction is critical given long uninterrupted hours of work with a system



# Personalization and Customization in Alma & Primo

**Ex Libris has been investing in additional personalization features for its products**



## Alma User Interface

Lists, MD Editor, New  
Menu



## Primo

Search results  
personalization



## Cloud Apps

Custom workflows &  
integrations



# Alma User Interface

# Personalization Examples

- Configure Record List Appearance
- Configure Table Columns

Physical titles ▾ Keywords ▾ history X Home Search Advanced ▾

>> Facets Institution Network Community

Customize view Cancel Save

Title information order ? Columns |||| Action order ? Show on right click

Column 1	Column 2	Column 3
<input checked="" type="checkbox"/> Type / Creator / Impri...	<input checked="" type="checkbox"/> Medium Type	<input checked="" type="checkbox"/> Orders
<input checked="" type="checkbox"/> Subject	<input checked="" type="checkbox"/> Language	<input checked="" type="checkbox"/> Requests
<input checked="" type="checkbox"/> Series	<input type="checkbox"/> Language Of Catalogi...	<input checked="" type="checkbox"/> Peer Reviewed
<input checked="" type="checkbox"/> Modification Date	<input checked="" type="checkbox"/> ISBN	<input checked="" type="checkbox"/> MMS ID

▼ Show all

Creation Date: 20/02/2012 22:43:55 GMT

● Physical (2) Other details

+ Add User ▾

- ☒ Name
- ☒ Account Type
- ☒ Record Type
- ☒ Job Category
- ☒ User Group
- ☒ Status
- ☒ Expiration date
- ☒ Blocks
- ☒ Notes

Done

# Alma New Layout

More vertical space

Search bar is always available

Improved navigation

Customize the menu and gain a more convenient workspace.

Holistic experience

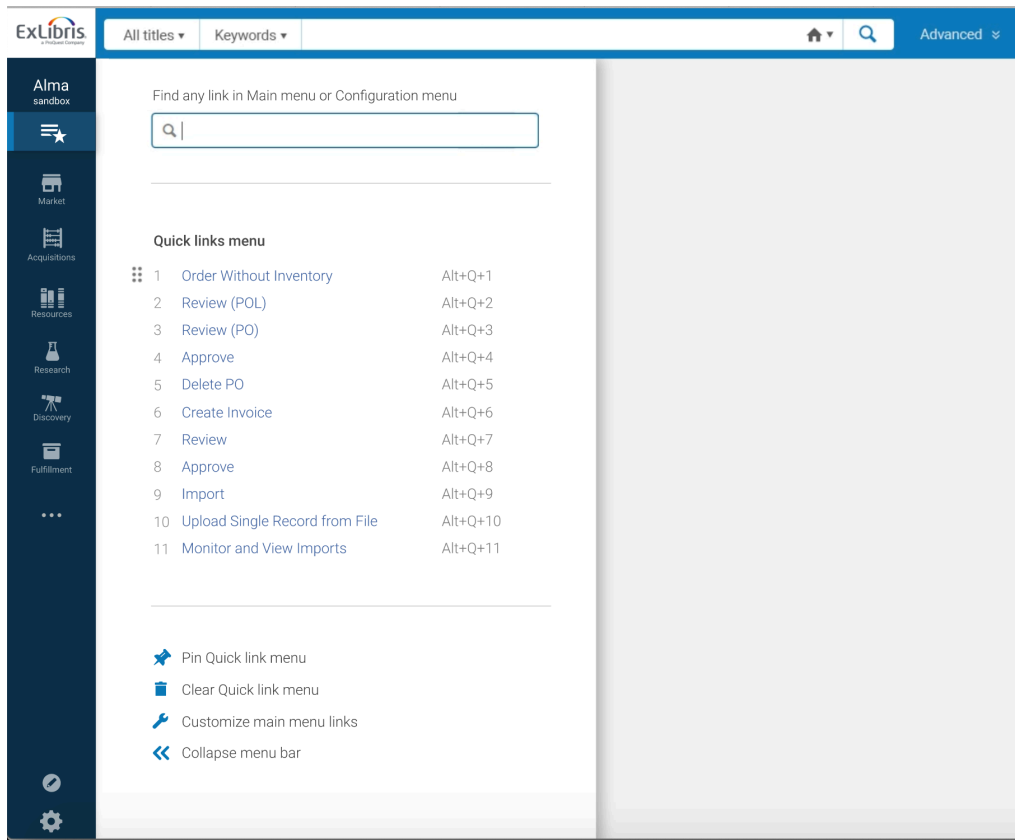
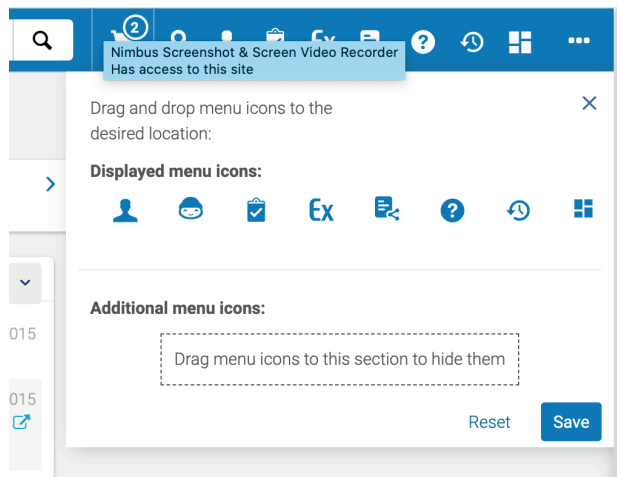
Dynamic workflows are better addressed.

The screenshot displays the Alma New Layout interface for the 'User Details' page. The interface is divided into several sections:

- Top Bar:** Includes the ExLibris logo, a search bar with 'Physical titles' and 'Keywords' dropdowns, a home icon, a magnifying glass icon, an 'Advanced' dropdown, and user profile icons.
- Left Sidebar:** A dark sidebar with icons for Alma Development, Market, Acquisitions, Resources, Fulfillment, Admin, Analytics, and a settings gear icon.
- Main Content Area:**
  - Navigation Tabs:** General Information, Contact Information (selected), Identifiers, Notes, Blocks, Fines/Fees, Statistics, Attachments, Proxy For, and History.
  - User Information Section:**
    - First name: Itai
    - Last name: Veltzman
    - Preferred middle name: (empty)
    - Primary identifier: itaive
    - PIN number: (masked with dots) and a Generate button
    - Job description: (empty)
    - User group: Please select a value
    - Website URL: (empty)
    - Status: Active
    - Birth date: (calendar icon)
    - Purge date: (calendar icon)
    - Purchase request library: (dropdown)
  - Personal Information Section:**
    - Middle name: (empty)
    - Preferred first name: (empty)
    - Preferred last name: (empty)
    - Title: (dropdown)
    - Job category: Please select a value
    - Gender: (dropdown)
    - Campus: (dropdown)
    - Preferred language: English
    - Status date: 16/07/2019
    - Expiration date: (calendar icon)
    - Resource sharing library: (dropdown)
    - Selected Patron Letters: (button)
    - Send message: General mail
- Right Sidebar:** A light gray sidebar with a user profile icon and the name 'Veltzman, Itai'. It lists user details: ID (itaive), Record type (Staff), Account Type (Internal), User group (-), and Identity Service (Not Used). There is an information icon at the bottom.

# New Menu Customization

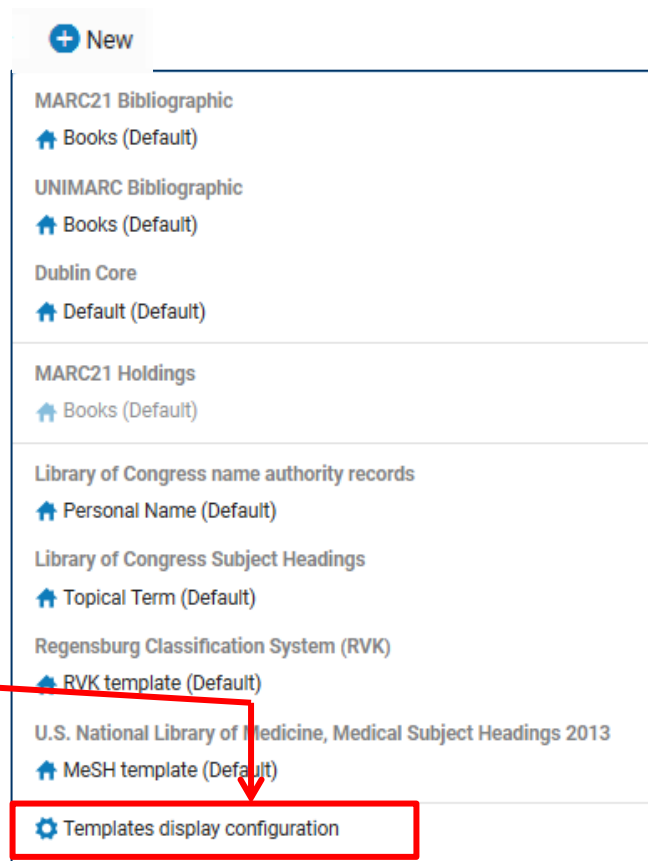
- Pin/Customize quick links
- Customize main menu links
- Customize menu icons



# New MD Editor – Template Configuration

- From the “new” menu, where templates may be chosen for creating a new record, there is a link to the “Templates display configuration”
- Note that this feature exists for bibliographic records, holdings records and local authority records.

Each user can click here to instantaneously define which templates will appear in his or her list when creating a new record



# Demo

## Alma user interface customization enhancements



# Links

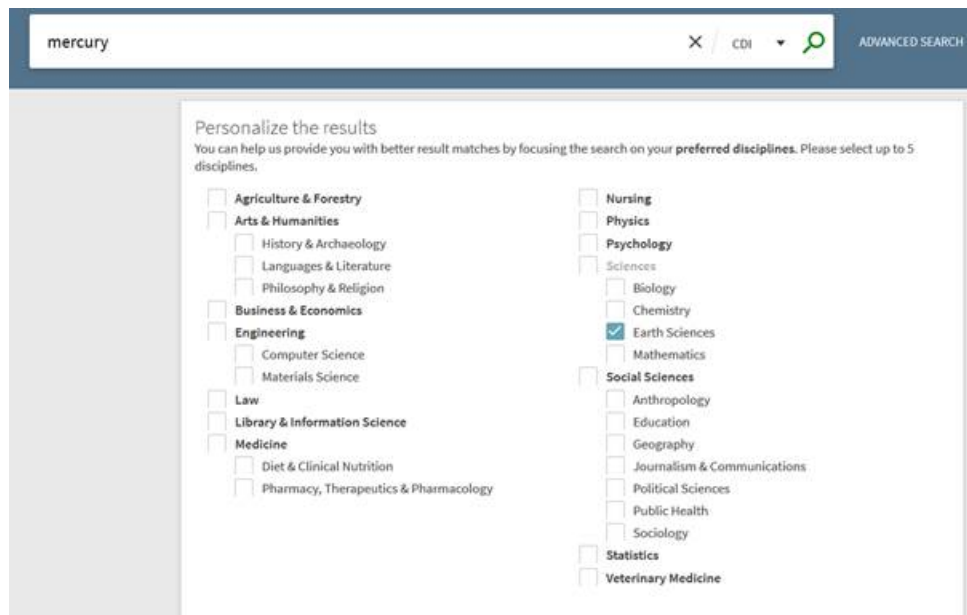
- [Usability Improvements Rollout Plan](#)
- [MD Editor Template Configuration](#)
  - [Demo](#)
- [Configure Record List Appearance](#)
- [Working with Table Columns](#)



# Primo

# Personalizing result ranking

- Ranking personalization for the central index results
  - Users can specify disciplines they are interested in – so when searching "mercury" Primo can boost articles about astronomy vs chemistry.



# Personalization on the Primo Road Map

- Number of results per page
- Recent search scopes or define most used scopes

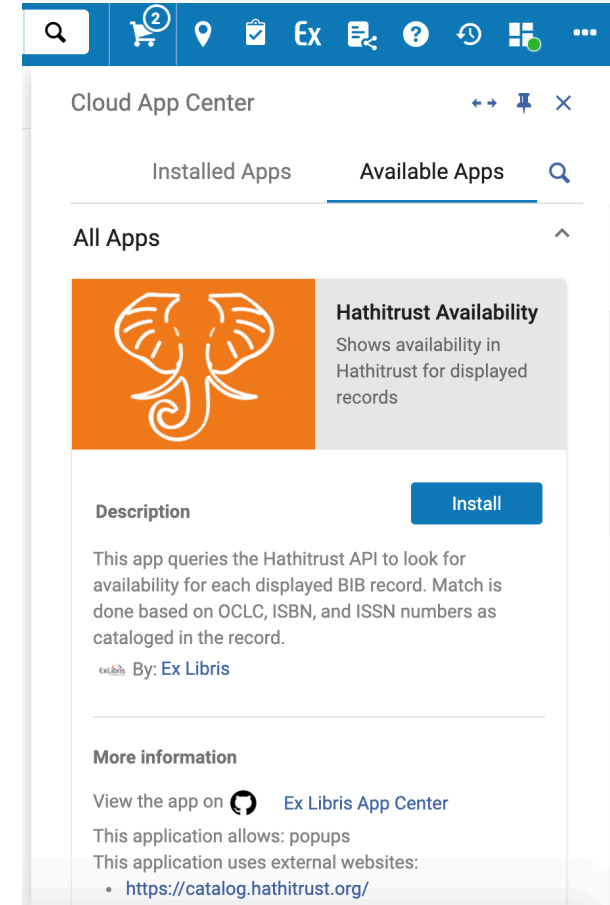




## Ex Libris Cloud Apps

# Cloud Apps

- Cloud Apps are applications which are written by the community (or Ex Libris) and run *inside* of the Ex Libris platform.
- Cloud Apps are easily searched, installed, and launched within Alma by the end user



# Cloud Apps

## Use cases for Cloud Apps:



Adding new functionality not currently supported



Workflow shortcuts or productivity enhancements



Integrating with external systems or data sources



# Cloud Apps for Launch



## Alma Role Toggler

Jeff Peterson

Alma | Cloud App

Quickly activate/deactivate an Alma user's roles.



## CSV User Loader

Josh Weisman

Alma | Cloud App

Create Alma users from a list in a comma separated file. Supports flexible configuration in multiple



## Hathitrust Availability

Mark Gobat

Alma | Cloud App

Queries the Hathitrust API to look for availability for each displayed BIB record. Match is



## Touchnet Payment Helper

Josh Weisman

Alma | Cloud App

Integrates a "Pay with Touchnet" option when accessing a user with an open balance. For



## Print Bib Records

Ori Miller

Alma | Cloud App

Allows quickly printing records from the repository hit list. Provides an XSL-based printing



## Alma Refine

Josh Weisman

Alma | Cloud App

Refine bibliographic records with services that adhere to the OpenRefine standard.

# Invoice Line Tax Calculator



Productivity enhancement

In Review Invoices (1 - 6 of 6)

Assigned to Me									
Unassigned									
Assigned to Others									
Invoice Number									
Invoice #	Vendor	Own	Cre from	Creatio Date	Last Updated Date	# of Lines	Total Price		
PO-4716	Yankee Book Peddler	Cl...	From PO	03/11/...	05/14/2020	5	89.50 USD		
PO-4818	Coutts Informati... Services	Cl...	From PO	03/11/...	03/11/2016	5	34.95 USD		
PO-4814	Yankee Book Peddler	Cl...	From PO	03/11/...	03/11/2016	5	34.95 USD		
PO-481322	Mostly Monogra... Inc.	Cl...	From PO	06/25/...	05/14/2020	5	28.00 USD		
PO-47198	Wiley-Blackwell	Cl...	From PO	06/25/...	03/11/2016	5	35.00 USD		
PO-6723	HARRAS... OTT	Cl...	From PO	10/09/...	03/11/2016	5	160.00 USD		

< Back

Pin X



Invoice Line Tax Calculator

...

## Invoices

< Back


PO-481322 (Mostly Monographs, Inc.)



No.	Type	Price	Current Tax	New Tax
999994	Insurance	0	0	7
999992	Discount	0	0	7
999993	Overhead	0	0	7
999991	Shipment	0	0	0
1	Regular	28	0	7

Update Invoices

Cancel

# CSV User Load

 New functionality

 **Alma CSV User Load** 

Select a profile  
Visiting Scholar ▼

Drag a CSV file or click to browse

Reset

Load users

# Toggle User Roles



Productivity enhancement

< User Details

Toggle Account Type

Cancel

Save

Abutbul, Niv



General Information

Contact Information

Identifiers

Notes

Blocks

Fines/Fees

Demerits

Statistics

Attachments

Proxy For

History

User Information



First name \*

Niv

Middle name

Last name \*

Abutbul

Preferred first name

Preferred middle name

Preferred last name

Primary identifier \*

NivA

Title

PIN number

Generate

Job category

Please select a value

Job description

Gender

Male

User group

Academic Staff

Campus

Website URL

Preferred language

English

Status

Active

Status date

12/29/2011

< Back



Role Toggler



Activate/Deactivate User Roles

User: Niv Abutbul

Active Roles: 1

Activate Roles

Deactivate Roles



Use the settings menu to selectively exclude roles from being toggled.

# Hathitrust Availability




< All Titles (1 - 20 of 25,498) | [history](#) Save Query

[Institution](#) [Community](#)

Sort by : **Rank** Secondary Sort by : **Rank** Expand Share Settings

[Material Type](#) : **Book** ×

1



**Ancient History [electronic resource].**

**Book (Book - Electronic)** By Morley, Neville. (Hoboken : Taylor and Francis 2013.)

**Subject:** Civilization, Ancient. History, Ancient. Electronic books.

**Series:** Routledge Key Guides


**Creation Date:** 02/25/2012 18:42:56 CST

**Modification Date:** 03/11/2016 16:05:50 CST

Physical ● **Electronic (1)** Digital [Other details](#)

[Edit Record](#) [Portfolio List](#) ⋮

2



**Enacting History [electronic resource].**

**Book (Book - Electronic)** By Magelssen, Scott. (Alabama : University of Alabama Press 2011.)

**Subject:** Electronic books.


**Creation Date:** 02/25/2012 20:30:32 CST

**Modification Date:** 03/11/2016 15:51:01 CST

Physical ● **Electronic (1)** Digital [Other details](#)

[Edit Record](#) [Portfolio List](#) ⋮

< Back Pin Close



## Hathitrust Availability

⋮

Availability of the displayed records in Hathitrust:

**Ancient History [electronic resource]., Morley, ...**  
No Hathitrust record found.

**Enacting History [electronic resource]., Magel...**  
No Hathitrust record found.

**Real History [electronic resource]., Bunzl, Mart...**  
No Hathitrust record found.

**Present history / Theodore Draper., Draper, Th...**  
No Hathitrust record found.

**History curatorship / by Gaynor Kavanagh., Ka...**

[Hathitrust record](#)

✓ Availability: Limited

**African history / Daniel Smith, editor., Smith, D...**  
No Hathitrust record found.

# Sound interesting?

- Use Cloud Apps developed by others
- Request from LIBIS Cloud Apps that implement integrations or optimize your personal workflows

*Cloud Apps are available with the new layout  
(now in sandbox, opt-in in July in production)*



# Demo

## Cloud Apps



# Links

- [Currently Available Cloud Apps](#)





## Q & A



# Thank you!

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