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

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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

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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

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Alma User Interface

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Personalization Examples

- Configure Record List Appearance

- Configure Table Columns

Alma New Layout

More vertical space

Search bar is always available

Improved navigation

Customize the menu and gain a more convenient workspace.
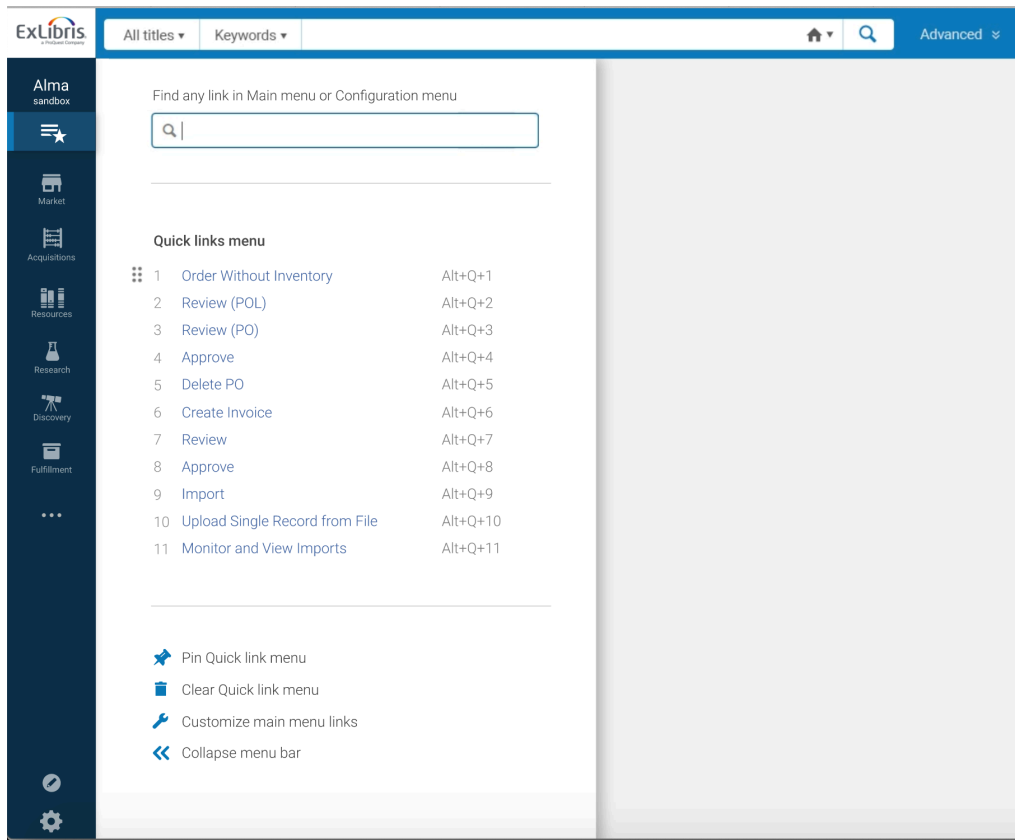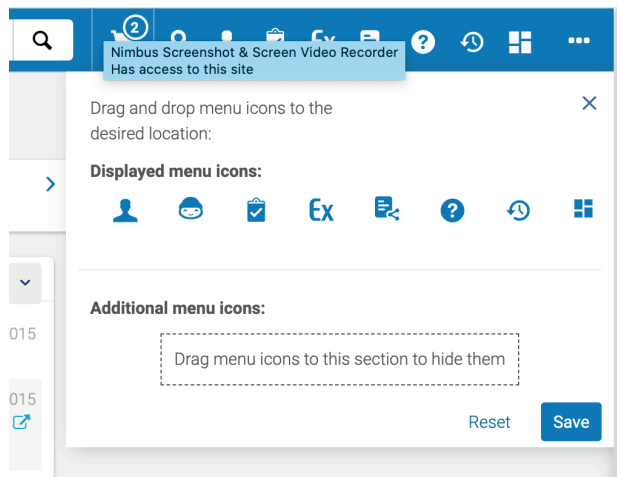
Holistic experience

Dynamic workflows are better addressed.

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

⊕ New

MARC21 Bibliographic
🏠 Books (Default)

UNIMARC Bibliographic
🏠 Books (Default)

Dublin Core
🏠 Default (Default)

MARC21 Holdings
🏠 Books (Default)

Library of Congress name authority records
🏠 Personal Name (Default)

Library of Congress Subject Headings
🏠 Topical Term (Default)

Regensburg Classification System (RVK)
🏠 RVK template (Default)

U.S. National Library of Medicine, Medical Subject Headings 2013
🏠 MeSH template (Default)

⚙ Templates display configuration

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Demo

Alma user interface customization enhancements

Links

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

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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.
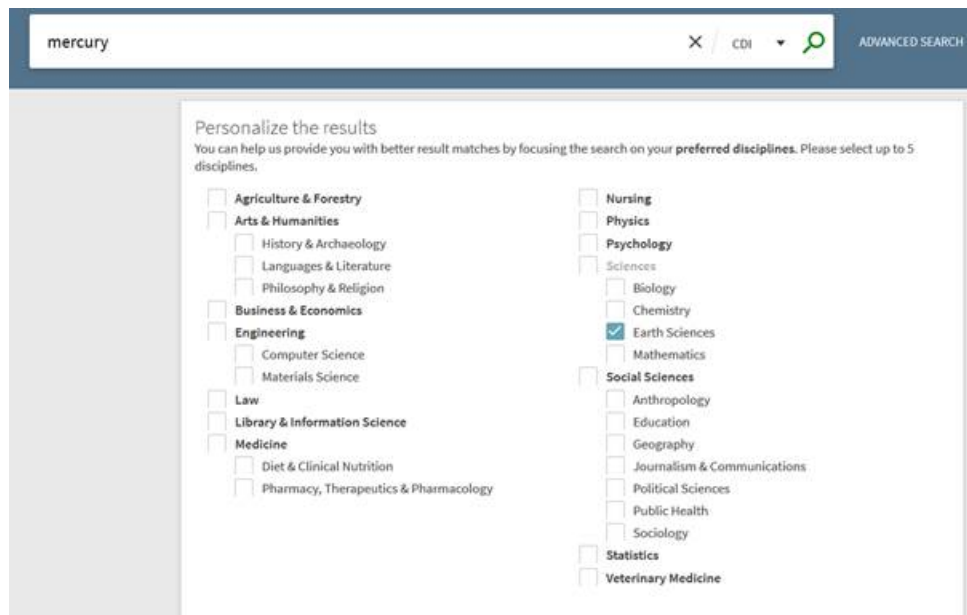
Personalization on the Primo Road Map

- Number of results per page

- Recent search scopes or define most used scopes

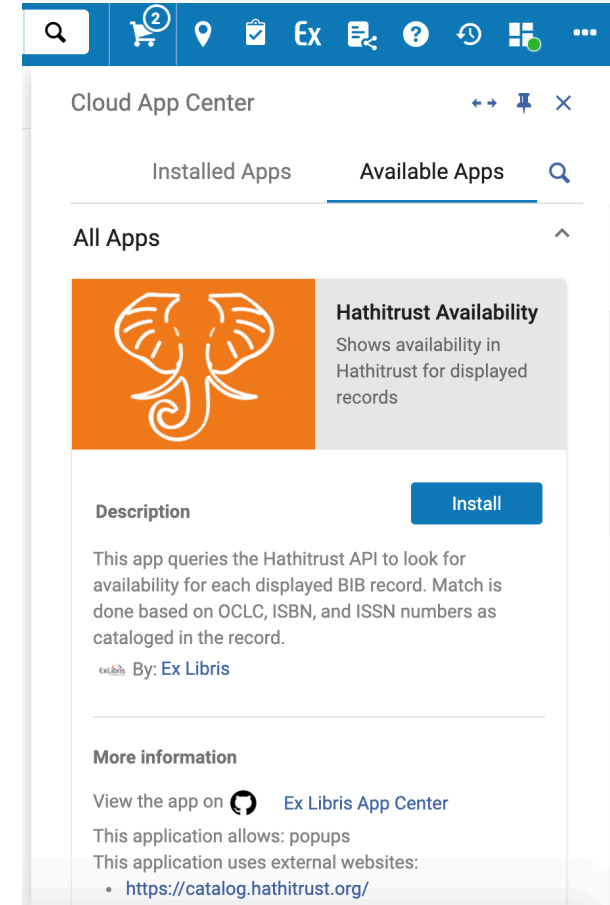# Ex Libris Cloud Apps

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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

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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

In Review Invoices (1 - 6 of 6)

| Assigned to Me | Unassigned | Assigned to Others |

Invoice Number ▾

⇕ Invoice # ❗	⇕ Vendor	Owne	Crea from	⇕ Creatio Date	Last Updated Date	⇕ # of Lines	⇕ Total Price	
PO-4716	0	Yankee Book Peddler	Cl... Tr...	From PO	03/11/...	05/14/2020	5	89.50 USD	...
PO-4818	0	Coutts Informati... Services	Cl... Tr...	From PO	03/11/...	03/11/2016	5	34.95 USD	...
PO-4814	0	Yankee Book Peddler	Cl... Tr...	From PO	03/11/...	03/11/2016	5	34.95 USD	...
PO-481322	0	Mostly Monogra... Inc.	Cl... Tr...	From PO	06/25/...	05/14/2020	5	28.00 USD	...
PO-47198	1	Wiley-Blackwell	Cl... Tr...	From PO	06/25/...	03/11/2016	5	35.00 USD	...
PO-6723	0	HARRAS... OTT	Cl... Tr...	From PO	10/09/...	03/11/2016	5	160.00 USD	...

‹ Back

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

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CSV User Load

Alma CSV User Load

Select a profile
Visiting Scholar

Drag a CSV file or click to browse

Reset   Load users

Toggle User Roles

‹ User Details

Toggle Account Type | Cancel | Save

Abutbul, Niv ℹ ›

| 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.*

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Hathitrust Availability

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

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Thank you!

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