



Personalization and Efficiency

Some tips and tricks for personalizing your Alma



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Agenda

- UI preferences & personalization options
- Tools to increase efficiency
- Recently added MDE features
- The new UX and what it can do for you

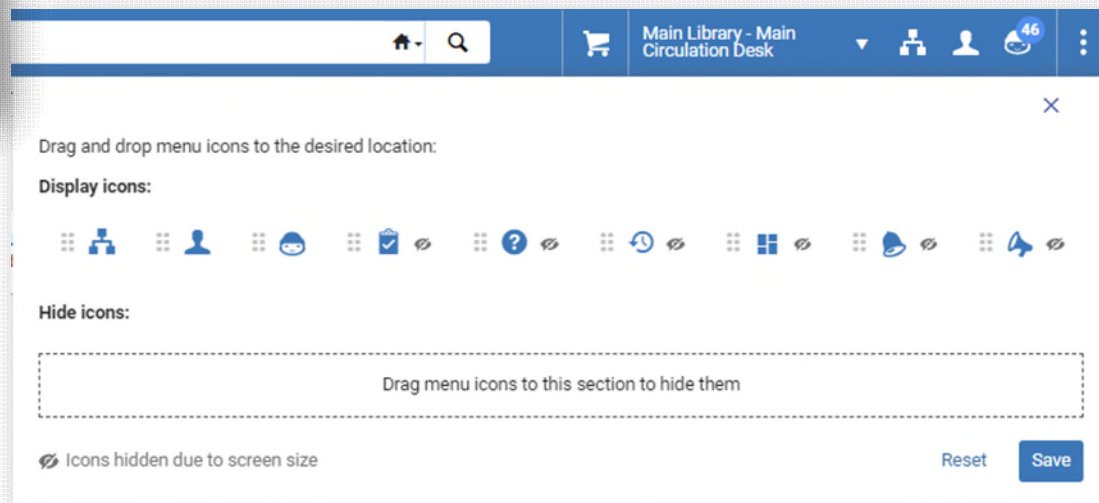
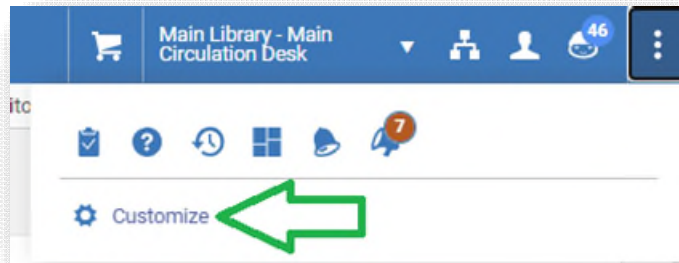




UI preferences & personalization options

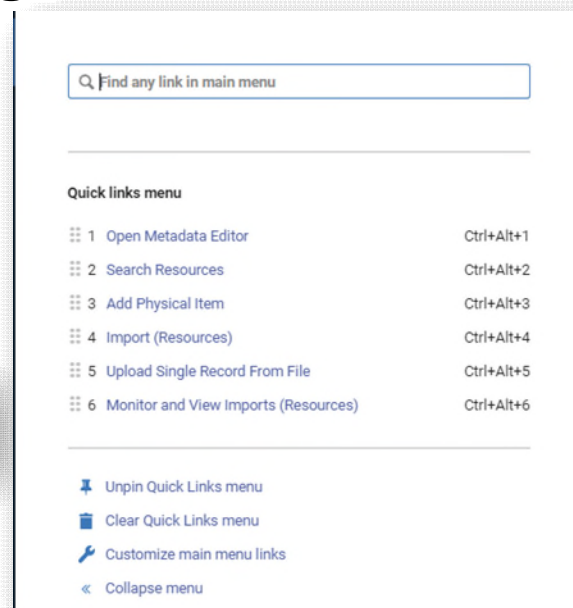
Configuring the persistent menu

- Easy access to your commonly used actions



Configuring personal quick links

- Easy access to your commonly used pages
 - Dedicated quick links menu
 - Dedicated keyboard shortcuts
 - Re-order the quick links as needed
 - Pin the quick links menu for single-click buttons



UI Preferences

The screenshot shows a user profile dropdown menu. At the top, the user is identified as 'Ford Prefect' with 'User Details' and a close button. 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' slider with three options (small, medium, large), where the medium option is selected. Below the slider is a 'Shortcuts customization' section. At the bottom of the menu, there is a 'Feature Rollout Configuration' section and a 'Sign out' button.

Display density

The screenshot displays the Ex Libris interface with a list of physical titles and a user details panel. The 'Display density' setting in the user preferences is highlighted, showing three options: compact, standard, and spacious. The compact option is selected.

Facets << Physical Titles (1 - 16 of 16) nice

Material Type ▾
Book (10)
Music (5)
Visual material (1)

Resource Type ▾
Audio musical - Physical (5)
Book - Physical (10)
Projected medium - Phys... (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)

Physical Titles (1 - 16 of 16) nice

Select All Sort by: Rank Secondary Sort by: Rank

1 **A lover would be nice / by F. Hugh Herbert.** Language: English
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
● Physical (1) Other details

2 **Almanach de l'Éclaireur de Nice.** Language: French
Book (Nice) imp de l'Éclaireur 1916.)
Modification Date: 11/30/2011 10:01
Creation Date: 09/15/2011 15:14
● Physical (1) Other details

Ford Prefect User Details

English ▾

Change Password

UI preferences

Display density

Shortcuts customization

Feature Rollout Configuration

[Sign out](#)

Facets << Physical Titles (1 - 16 of 16) nice

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)

Physical Titles (1 - 16 of 16) nice

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Creation Date: 09/15/2011 16:10
● Physical (1) Other details

Ford Prefect User Details

English ▾

Change Password

UI preferences

Display density

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

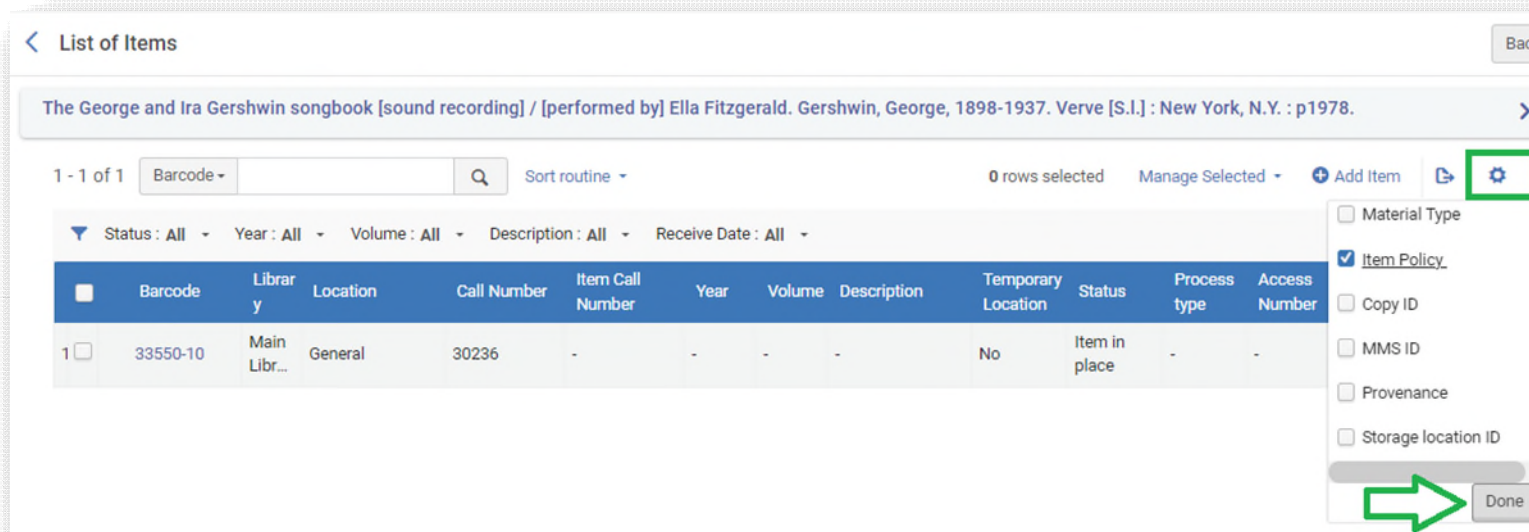
- Select helpful widgets to be displayed in your home page
- An admin can customize widget options

The screenshot shows the Alma home page interface. A 'Manage Widgets' dialog box is open, displaying a table of widgets. The table has three columns: 'Active', 'Widget name', and 'Description'. The 'Scheduled Jobs Status' widget is checked as active. A green arrow points to a plus sign icon in the top right corner of the home page.

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

Configuring columns display in tables

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



The screenshot shows the 'List of Items' interface. At the top, there is a breadcrumb trail: 'The George and Ira Gershwin songbook [sound recording] / [performed by] Ella Fitzgerald. Gershwin, George, 1898-1937. Verve [S.I.] : New York, N.Y. : p1978.' Below this, there are search and filter options, including a search bar with 'Barcode' selected and a 'Sort routine' dropdown. A table of items is displayed with columns: Barcode, Library, Location, Call Number, Item Call Number, Year, Volume, Description, Temporary Location, Status, Process type, and Access Number. A single item is listed with a checkbox, barcode '33550-10', library 'Main Libr...', location 'General', call number '30236', and status 'Item in place'. A settings gear icon is highlighted with a green box, and a configuration menu is open, showing options to check or uncheck various columns: Material Type, Item Policy (checked), Copy ID, MMS ID, Provenance, and Storage location ID. A green arrow points to the 'Done' button at the bottom of the menu.

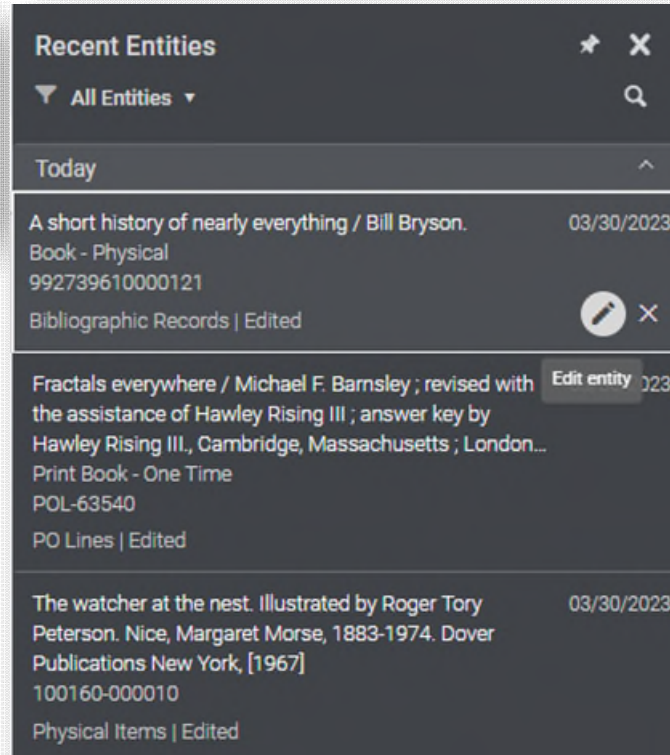
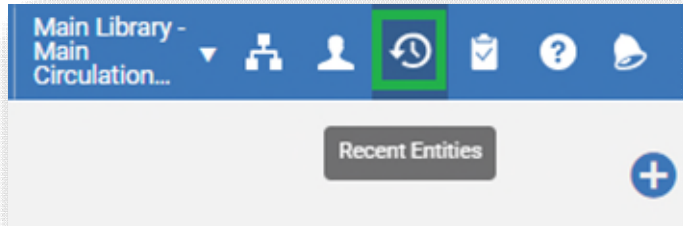
	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Access Number
1	33550-10	Main Libr...	General	30236	-	-	-	-	No	Item in place	-	-



Tools to increase efficiency

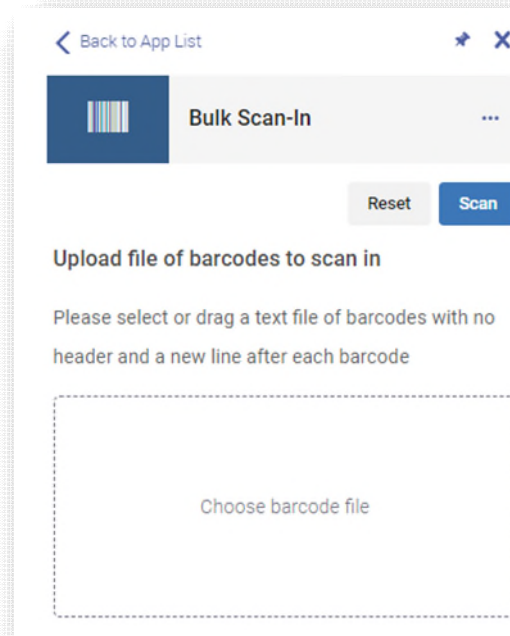
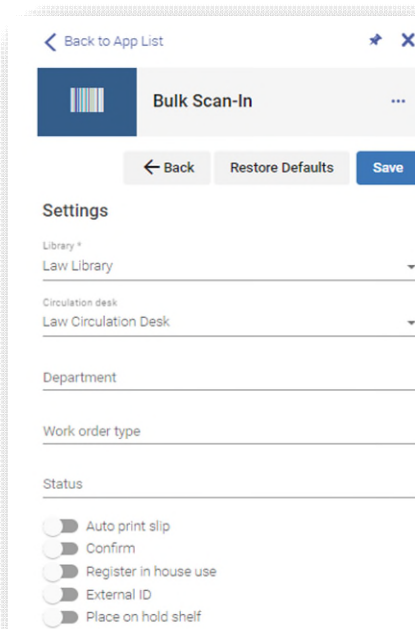
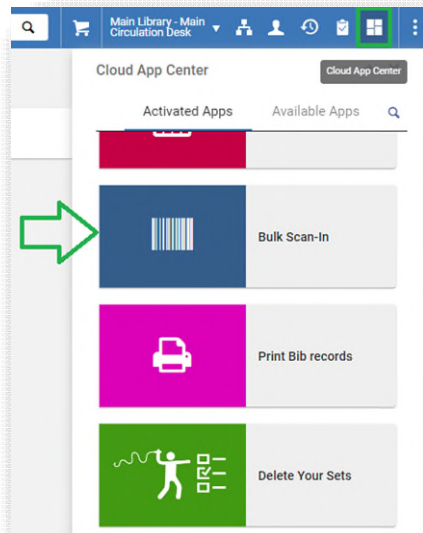
Recent entities

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



Cloud Apps

Useful [apps](#) which increase efficiency, e.g. [Bulk Scan In](#):
Scan in multiple items at a specific desk / department.





Recently added MDE features

MDE quick links

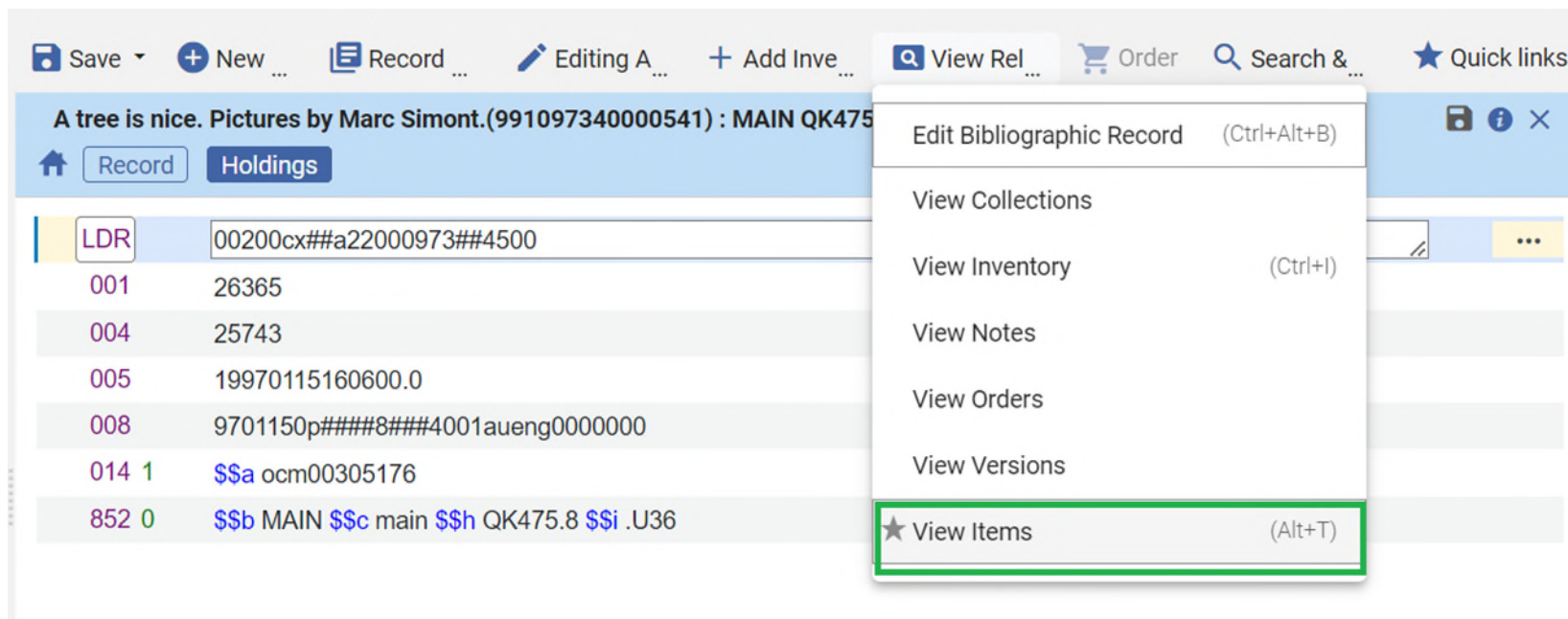
- Easy access to your commonly used pages
 - Define quick links and re-order as needed
 - Dedicated keyboard shortcuts
 - Pin the quick links menu for single-click buttons

The screenshot shows the Metadata Editor (MDE) interface. On the left, a list of records is displayed with columns for LDR, call number, and various fields. The record with call number '01363nam#a22004091##4500' is selected. On the right, a 'Records - Quick links menu' is open, listing six actions with their respective keyboard shortcuts. The 'Add Portfolio' link is highlighted with a green border. Below the menu, there is a pin icon and the text 'Unpin Quick links menu'. 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'.

Quick Link	Keyboard 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

View Items

- Quickly and efficiently view a holdings' items while editing the holdings record



The screenshot shows a library catalog interface. At the top, there is a navigation bar with buttons for 'Save', 'New ...', 'Record ...', 'Editing A ...', '+ Add Inve ...', 'View Rel ...', 'Order', 'Search & ...', and 'Quick links'. Below this, a record title is displayed: 'A tree is nice. Pictures by Marc Simont.(991097340000541) : MAIN QK475'. There are two tabs: 'Record' and 'Holdings'. The 'Holdings' tab is active, showing a table of holdings. The first row is highlighted in blue and contains the following data:

LDR	00200cx##a22000973##4500
001	26365
004	25743
005	19970115160600.0
008	9701150p####8###4001aueng0000000
014 1	\$\$a ocm00305176
852 0	\$\$b MAIN \$\$c main \$\$h QK475.8 \$\$i .U36

A dropdown menu is open over the 'View Rel ...' button, listing several options: 'Edit Bibliographic Record (Ctrl+Alt+B)', 'View Collections', 'View Inventory (Ctrl+I)', 'View Notes', 'View Orders', 'View Versions', and '★ View Items (Alt+T)'. The 'View Items' option is highlighted with a green border.

Copy/Cut/Paste fields

- Separate copy/cut/paste fields actions
 - No confusion between pasting fields and field content
 - Copy and paste multiple fields by using Ctrl+select

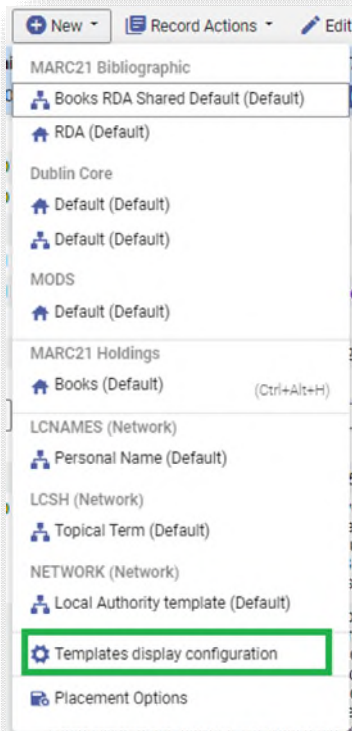
The screenshot displays a library catalog interface with a list of records on the left and a context menu on the right. The records list includes fields such as LDR, 001, 008, 020, 035, 100, 245, 260, 264, 300, 336, 337, 338, and 590. The context menu is open over record 337, showing options like 'Paste Field', 'Enhance the Record', 'Expand from Template', 'Generate Author Number', 'Add Alternate Graphic Representation', 'Show Directional Characters', and 'Insert Directional Characters'. A green arrow points from the 'Copy Field' option in the menu to the record list, and another green arrow points from the 'Paste Field' option to the record list.

Field	Value
LDR	#####nam#a22#####4500
001	99203511200191
008	#####s2015#####x#####
020	SSa 9780803732568
035	SSa 9541016
100	SSa Sherry, Kevin
245	SSa Acorns everywhere! / by Kevin
260	SSa New York SSb Dial Books for
264	SSc 2015
300	SSa p. SSc cm
336	SSa text SS2 rdacontent
337	SSa unmediated SS2 rdamedia
338	SSa volume SS2 rdacarrier
590	SSa Created via order from OASIS

Field	Value
300	SSa New York : SSb Broadway Bo
300	SSa ix, 544 p. ; SSc 25 cm.
337	SSa unmediated SS2 rdamedia
338	SSa volume SS2 rdacarrier
504	SSa Includes bibliographical refere
505	SSa Lost in the cosmos: How to be
520	SSa In this book Bill Bryson explor
590	SSa Created via order from OASIS
650	SSa Science SSv Popular works.

Templates display configuration

- Select which templates to display in the “New” menu



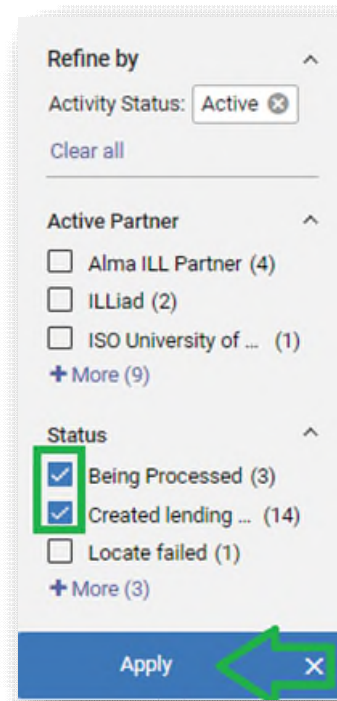
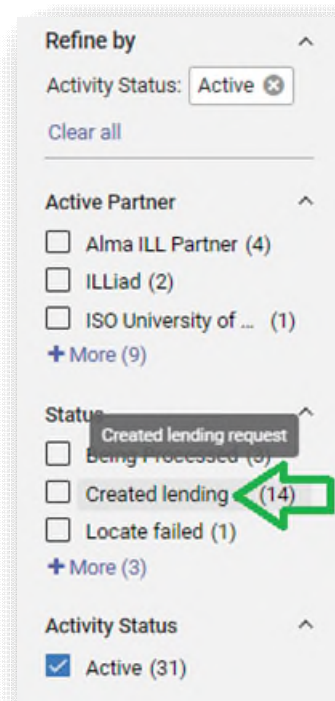
Templates display configuration							Save
No.	Template Format	Template Name	Template Origin	Destination	Template Type	Template Status	Display in Menu
1	DC	Default (Default)	🏠	🏠	Shared		<input checked="" type="checkbox"/>
2	DC	Default (Default)	👥	🏠	Shared	🔒	<input checked="" type="checkbox"/>
3	MARC21 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



Move between search results

- Use the up/down arrows to move to previous / next item

The screenshot displays the 'Lending Requests' interface. The main list shows five items, with the second item highlighted. The detailed view on the right shows the 'Next item' button highlighted in green.

Lending Requests (1 - 20 of 31)

Author [] Sort by: Update Date [v]

1 [] Celebrating Bird [videorecording] : the triumph of Charlie Parker.
OCLC Navigator
Shipped Physically

2 [] OCLC Navigator
Locate failed

3 [] Water /
Open University
Created lending request

4 [] Water /
Open University
Created lending request

5 [] American and allied ideals: an appeal to those who are neither hot nor cold.
by Sherman, Stuart Pratt,
ILLiad
Shipped Physically

Print Slip Rep

Sections [v] Edit [] ... []

External identifier: RRRR4
Locate failed
Add Label

Request form (as filled by requester)

Volume: -
Chapter title: -
Chapter author: -
Chapter number: -
Publication date: -

Next item

Make some changes directly from search results

The screenshot displays a library system interface. On the left, a list of 14 lending requests is shown, with the first six items visible. Each item includes a checkbox, a book cover icon, the title, the provider, and a 'Created lending request' status. The first item is 'Water / Open University'. On the right, a detailed view of the selected item is shown. It includes the book cover, title, ISBN (9780737745467), OCLC (317921744), LCCN (2009022929), and external identifier (EXL:DEMO3_1//EXLDEV10005200). It also shows options for Physical and Electronic formats, a 'Created lending request' status, and an 'Add Label' button. Below this, a 'Notes' section contains a yellow sticky note with the text 'Please note the following...' and a trash icon. At the bottom of the notes section, there is an 'Add Note' button with a plus sign, which is highlighted by a green arrow.

< Lending Requests (1 - 14 of 14) Print Slip Report

Author Sort by: Update Date

1 Water / Open University
Created lending request

2 Water / Open University
Created lending request

3 NACSIS NACSIS
Created lending request

4 Tumor Growth Mitigating Effects of Valproic Acid in Systemic Malignancies / Journal of thyroid research
Open University
Created lending request

5 Harry Potter and the goblet of fire
Alma ILL Partner
Created lending request

6 The sermon
by Smith, Jimmy

Sections Edit ...

Water /
ISBN: 9780737745467 (hardcover)
OCLC: 317921744
LCCN: 2009022929
External identifier:
EXL:DEMO3_1//EXLDEV10005200
● Physical ● Electronic
Created lending request
+ Add Label

Notes

Please note the following...

+ Add Note

Add labels to easily identify items requiring work

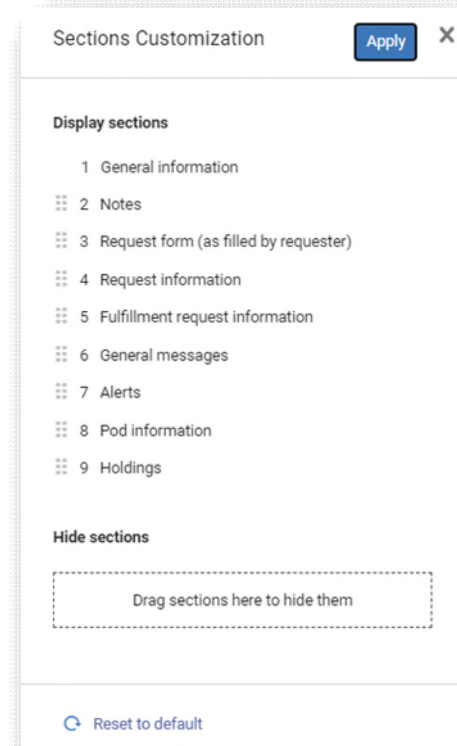
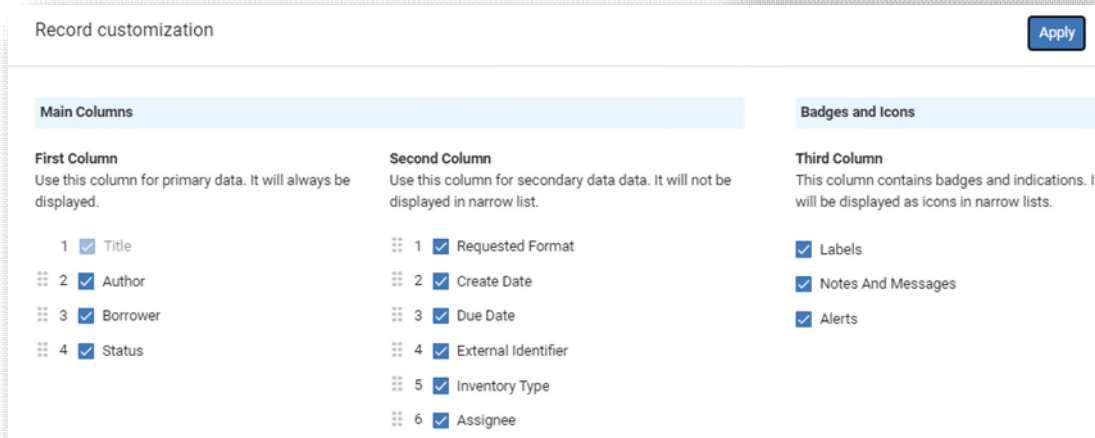
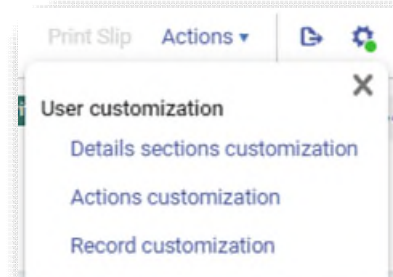
- Add your own labels as needed
- Facet by your label to fetch only labeled entities

The screenshot displays the 'Lending Requests' interface. On the left, a 'Refine by' sidebar shows a 'Labels' section with a green box around the 'Check with Hadas (3)' option. The main area shows a list of three requests. The first and third requests have a green box around the 'Check with Hadas' button. The second request is highlighted with a blue background.

Request ID	Title	Author	Requested	Created	External Identifier	Physical/Electronic	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	Physical	Ex Libris Staff	Check with Hadas

Personalize what you see where

- Configuring the display of actions, sections and size of the split-view pane



Thank you!

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