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International Group of Ex Libris Users
Personalisation and Efficiency
Some Tips and Tricks for Personalizing Your Alma
Lili Daie

Agenda

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

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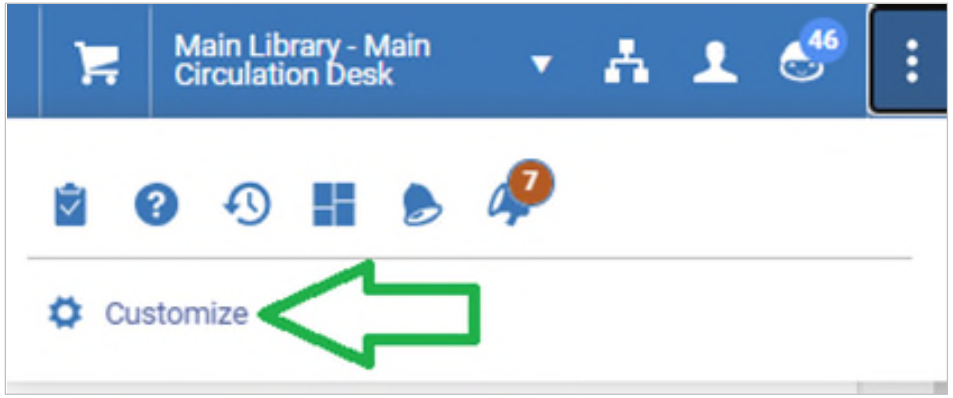
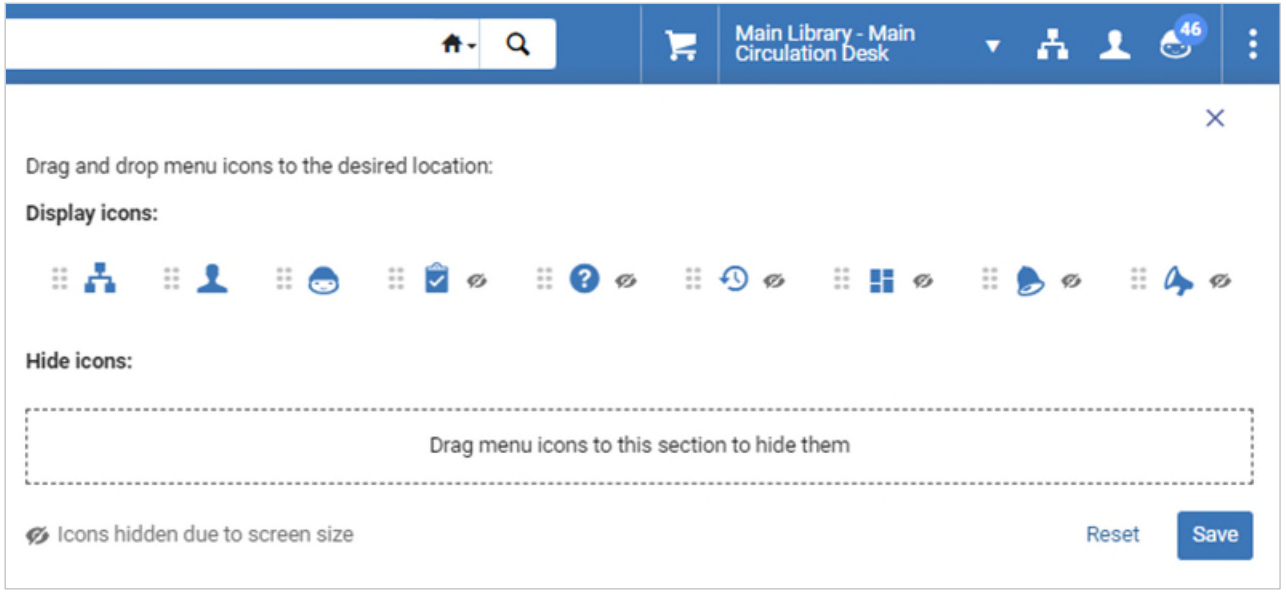
UI Preferences & Personalization Options

Configuring the Persistent Menu

Easy access to your commonly used actions





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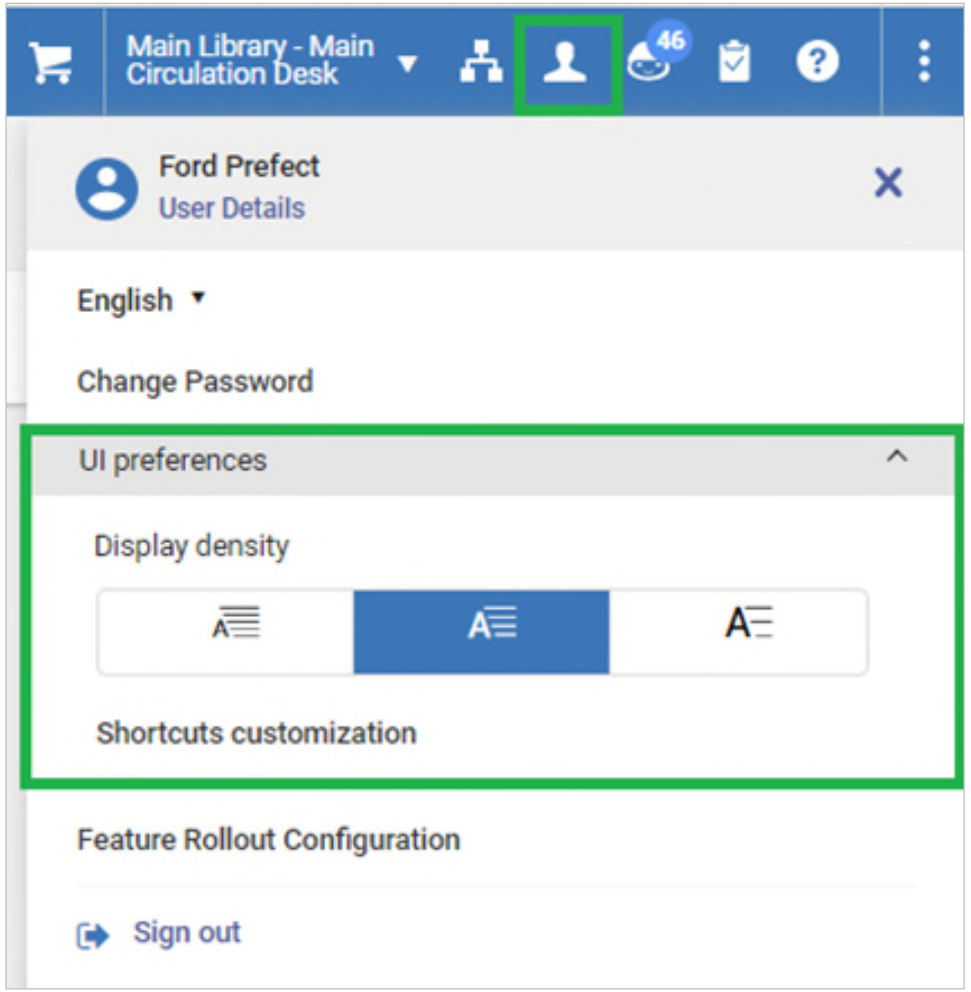
UI Preferences



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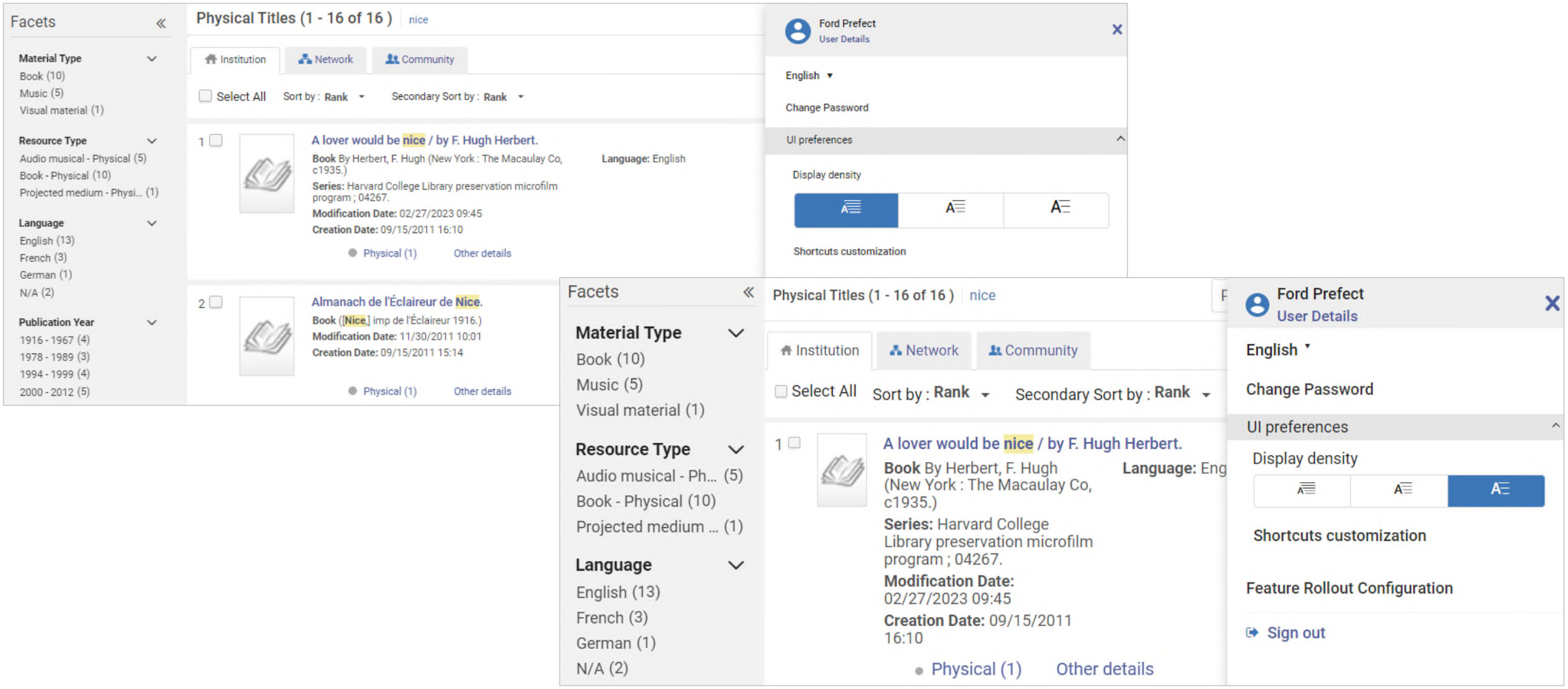
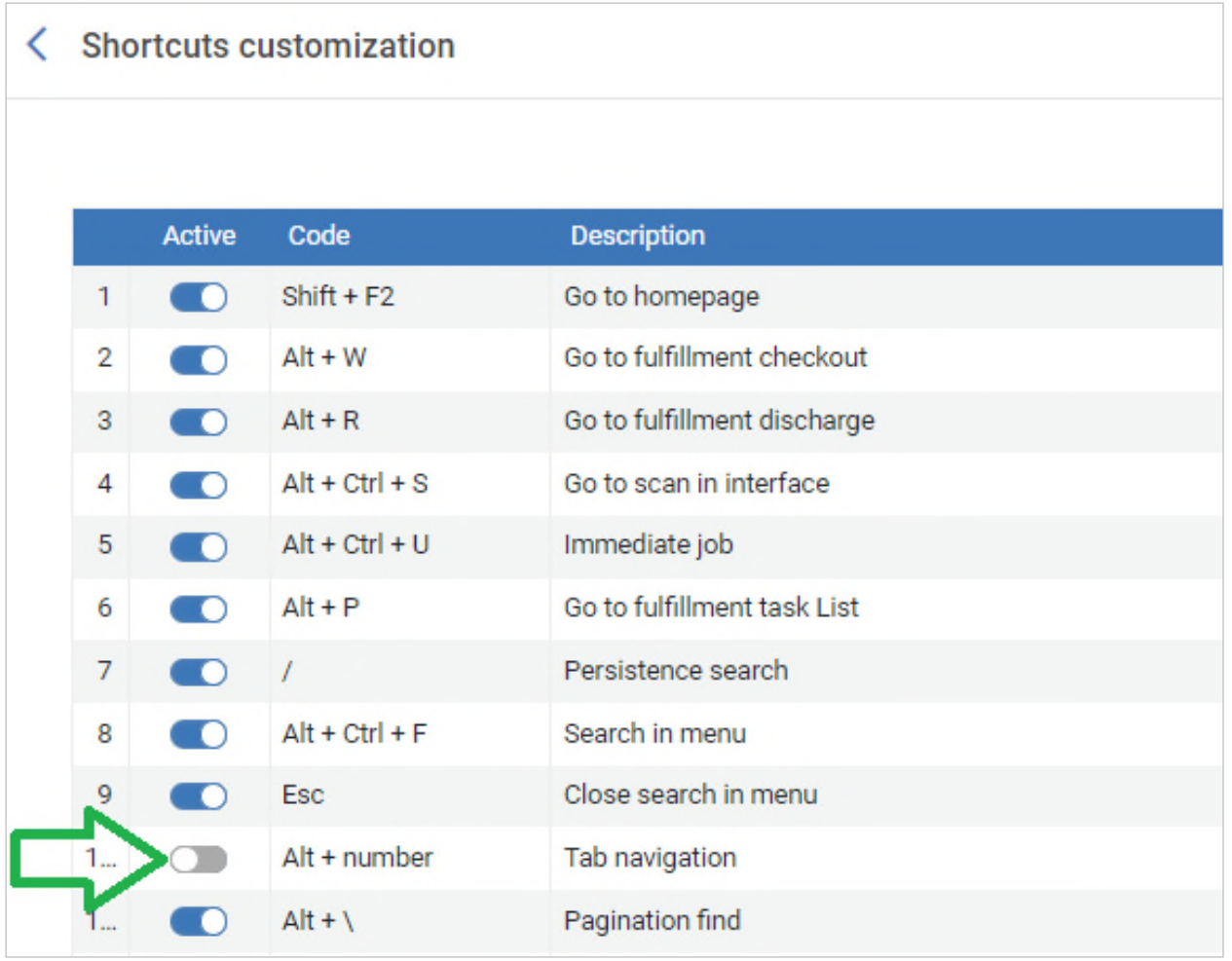
Display Density



Keyboard Shortcuts & Customization



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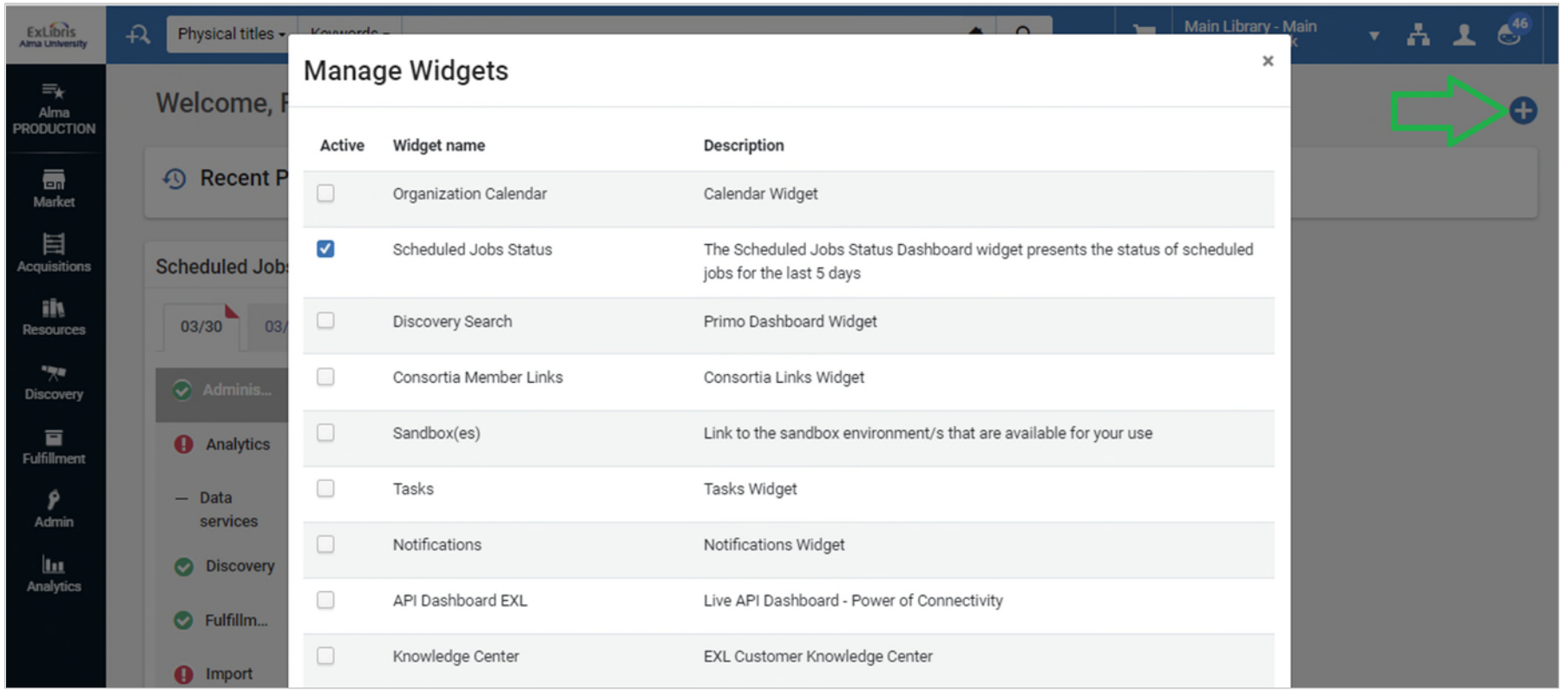
Alma Home Page

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



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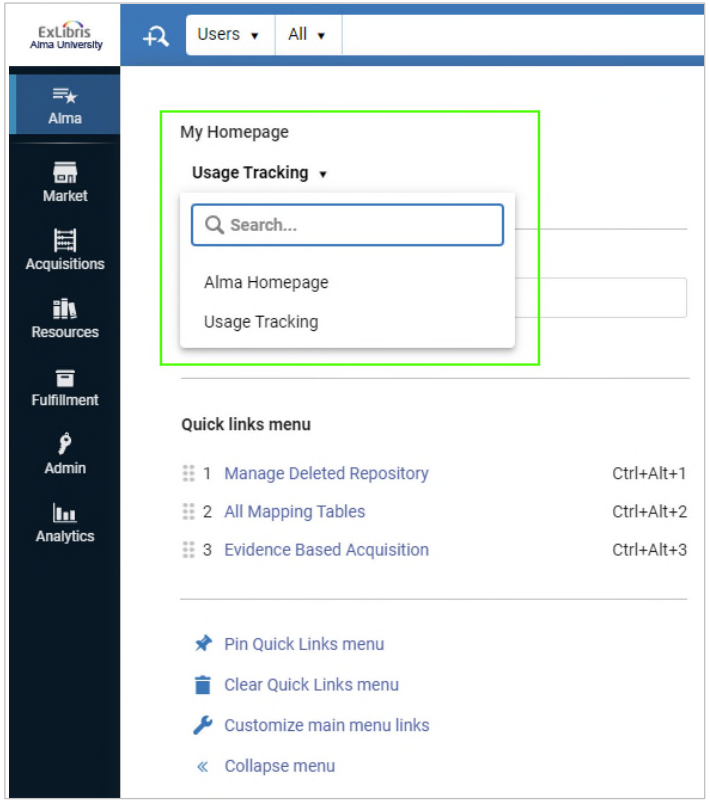
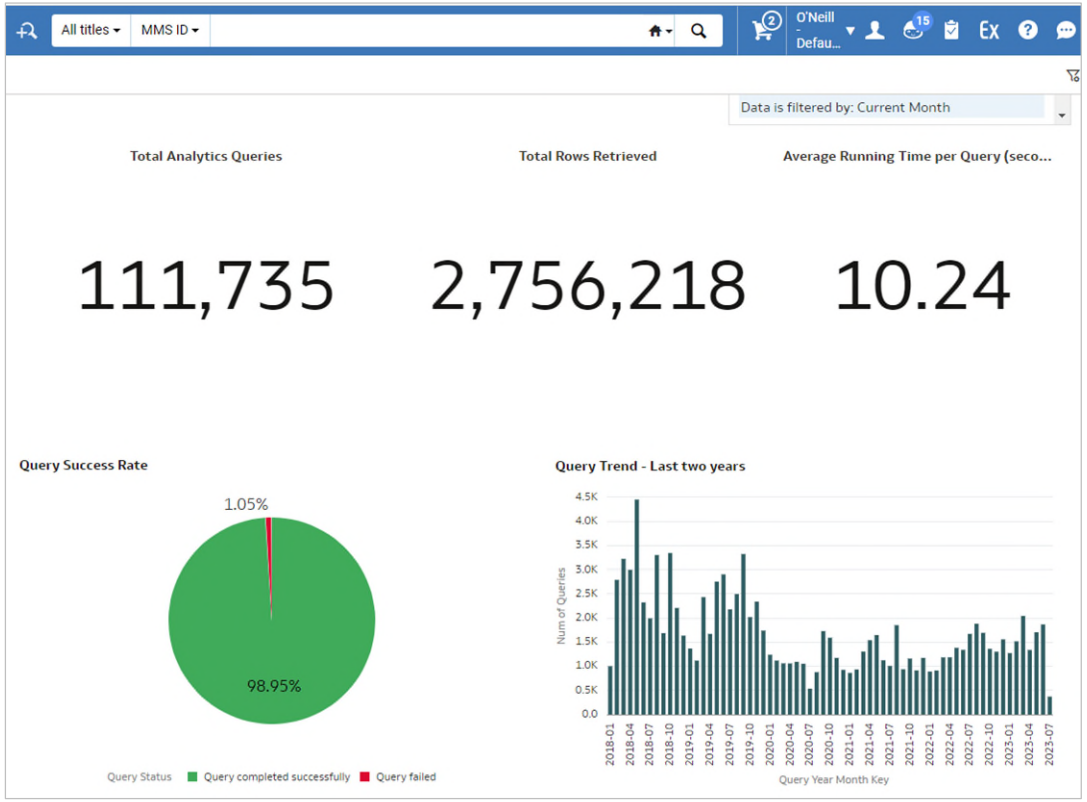
Alma Home Page

- Select a Data Visualization Workbook as your homepage
- Analytics staff can [create custom data visualizations]





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Configuring Columns Display in Tables

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

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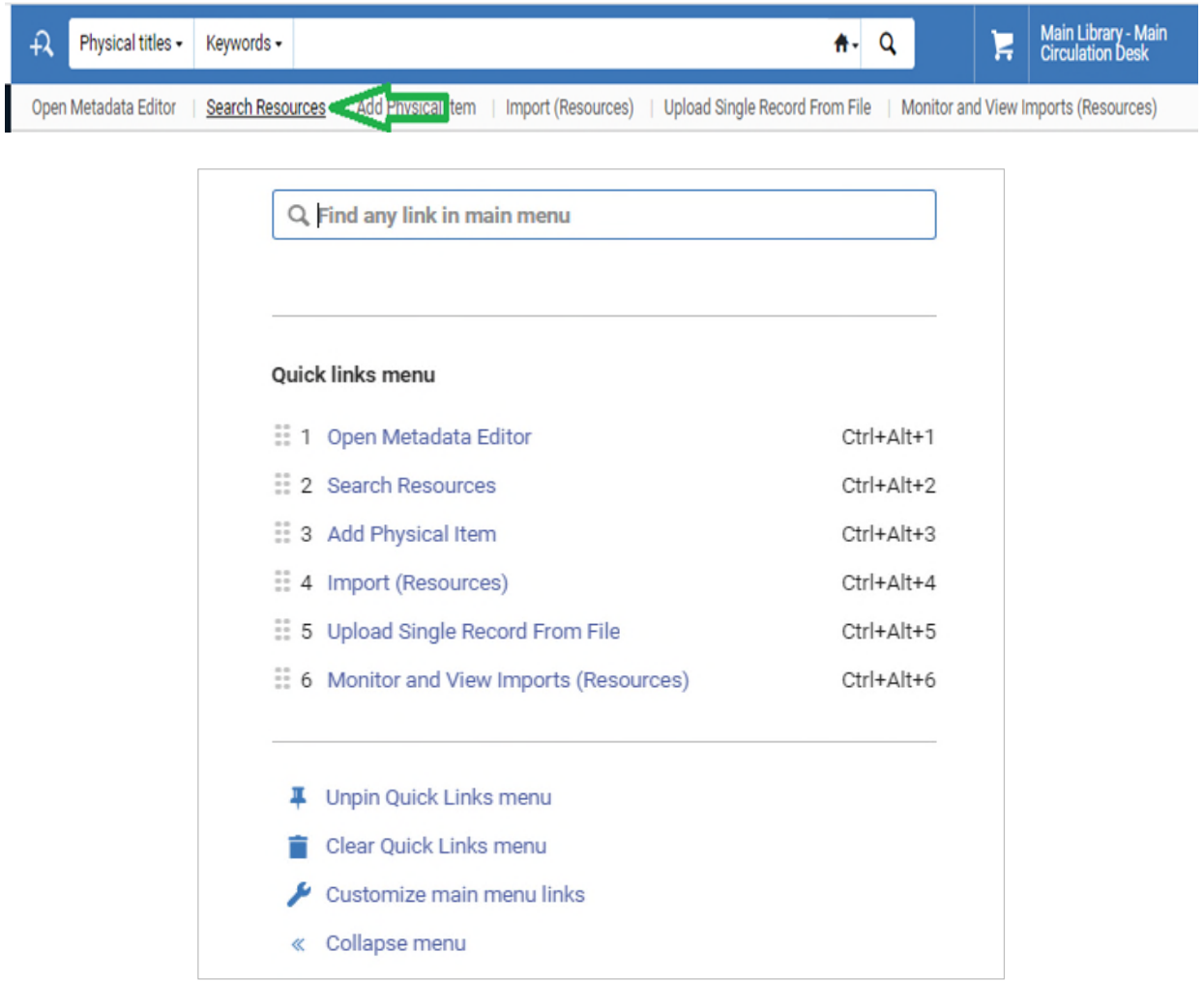
Tools to Increase Efficiency

Configuring Personal Quick Links

Easy access to your commonly used pages

- Dedicated quick links menu
- Dedicated keyboard shortcuts
- Re-order quick links as needed
- Pin quick links menu for single-click buttons



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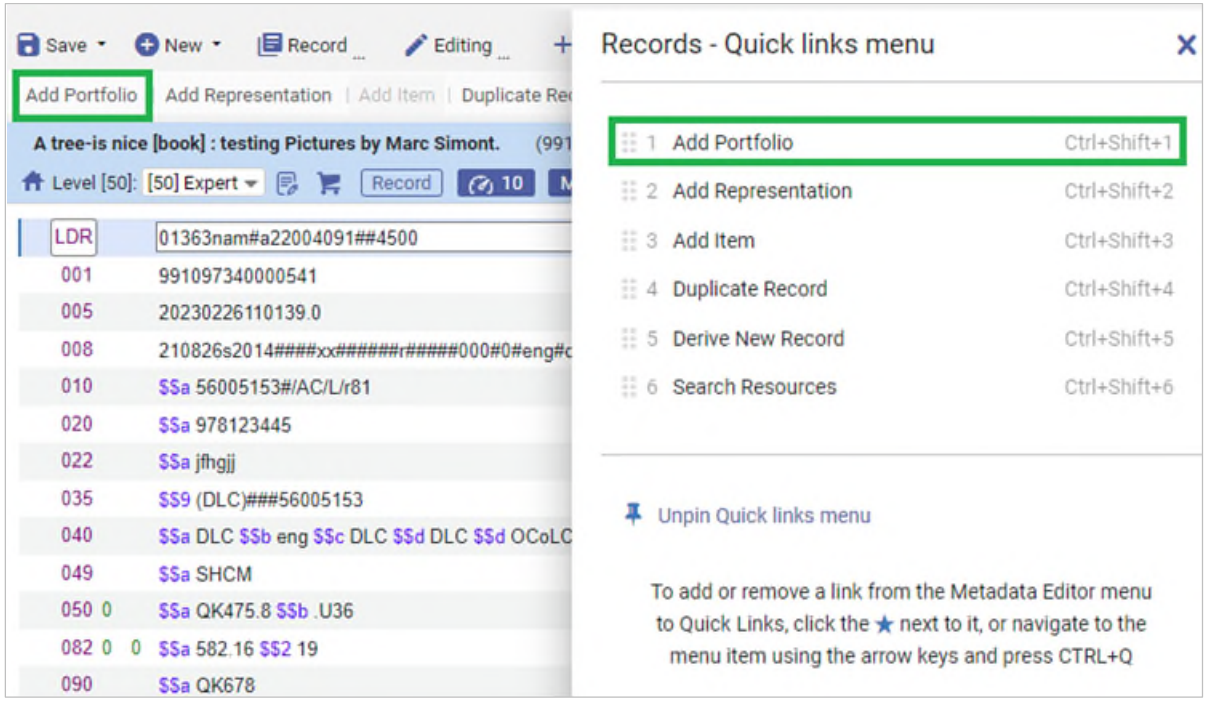
MDE Quick Links

Easy access to your commonly used actions

- Define quick actions and re-order as needed
- Pin quick links menu in MDE for single-click buttons



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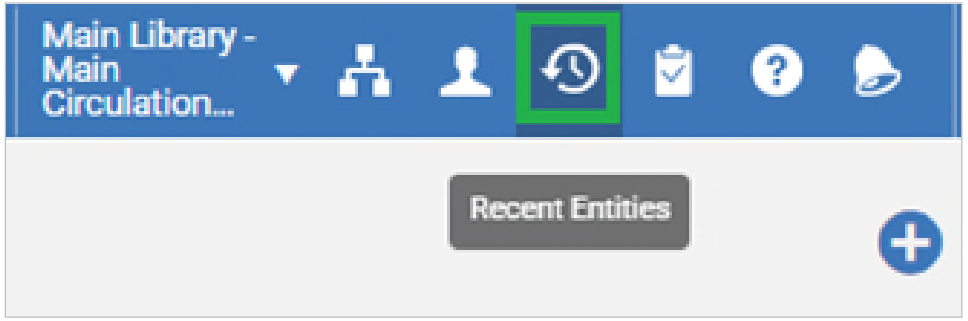
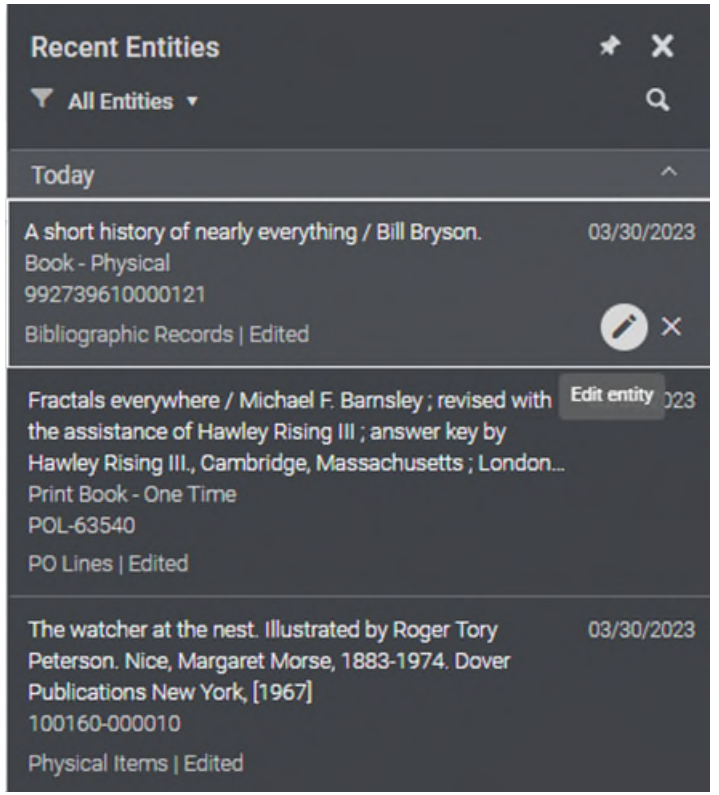
Recent Entities

View and edit your recently handled entities





- Bibliographic records
- Authority records
- Holdings records
- Physical items
- Electronic portfolios
- Electronic collections
- Electronic services
- Digital collections
- Digital representations
- Digital files
- Digital deposits
- Repository sets
- PO lines
- Mapping tables
- Code tables
- Integration profiles

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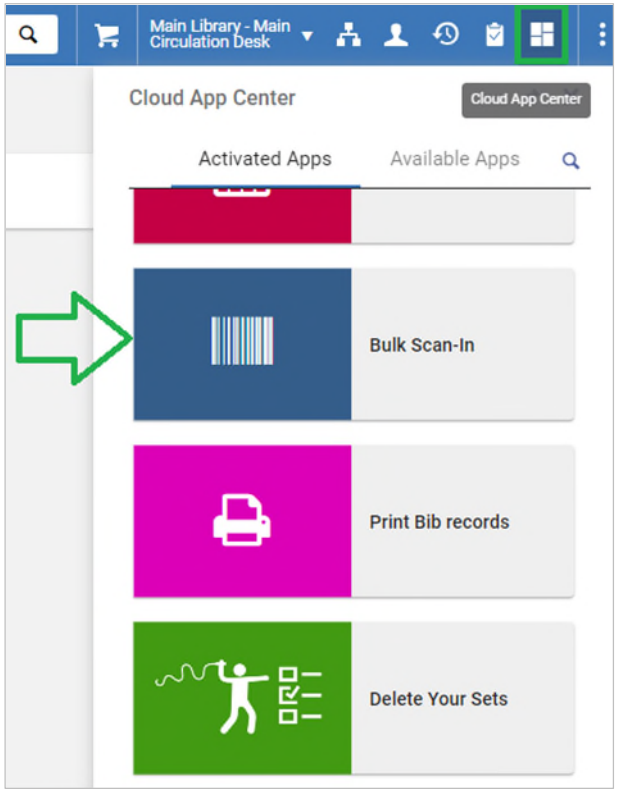
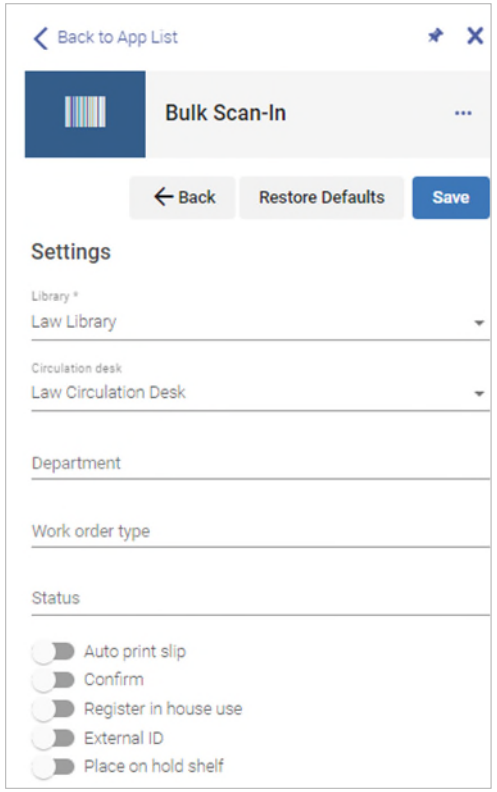
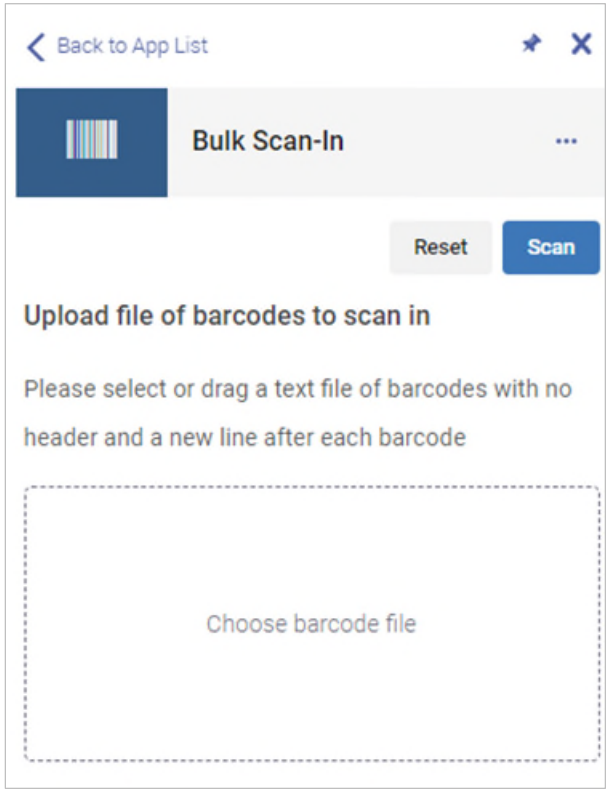
Cloud Apps

Useful apps which increase efficiency

E.g., Bulk Scan In: scan in multiple items at a specific desk/department







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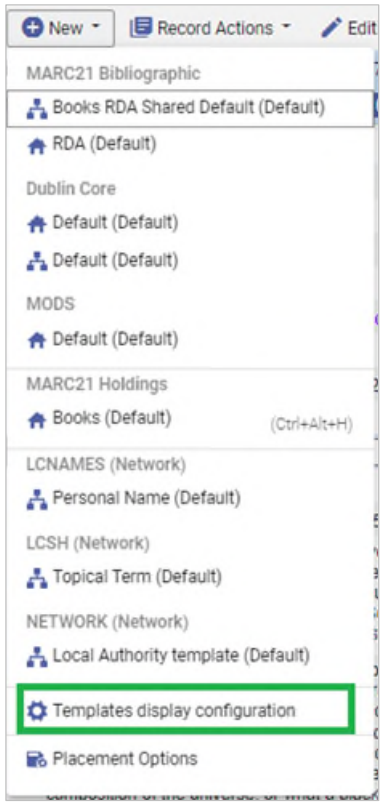
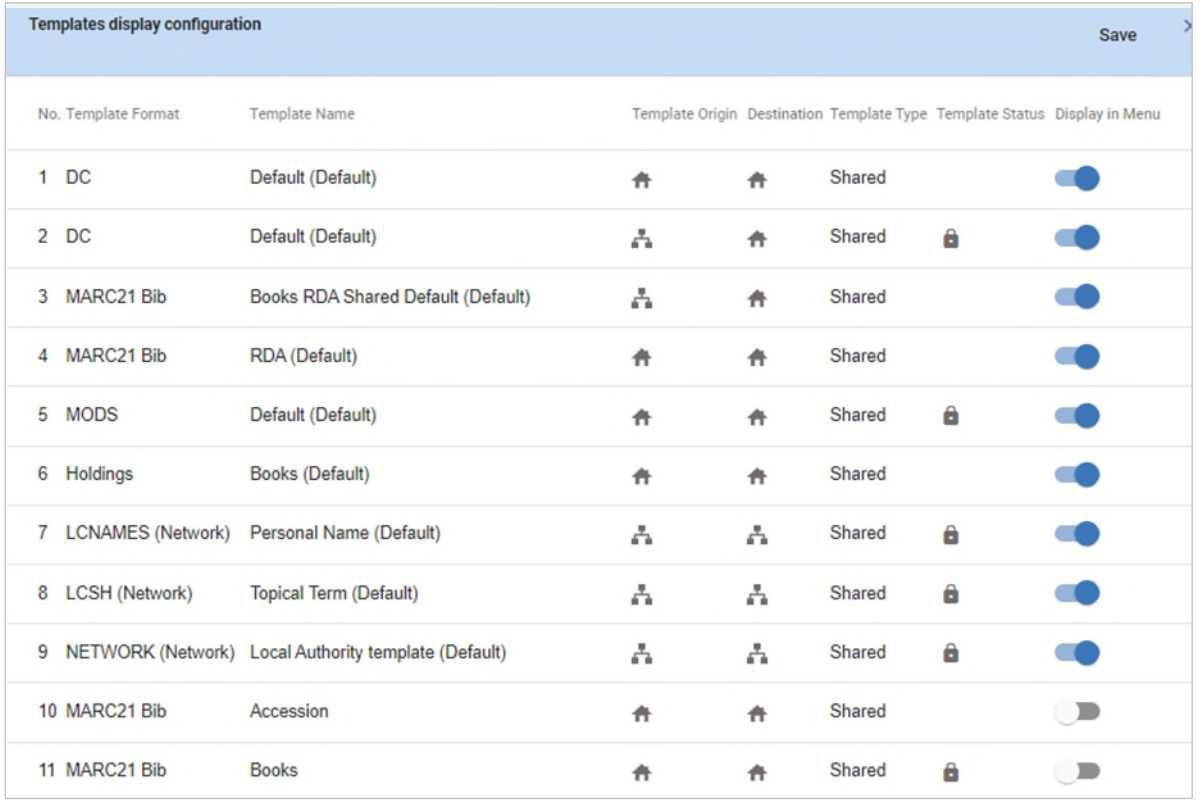
MDE Templates Display Configuration

Select commonly used templates to display in “New”





No.	Template Format	Template Name	Template Origin	Destination	Template Type	Template Status	Display in Menu
1	DC	Default (Default)			Shared		
2	DC	Default (Default)			Shared		
3	MARC21 Bib	Books RDA Shared Default (Default)			Shared		
4	MARC21 Bib	RDA (Default)			Shared		
5	MODS	Default (Default)			Shared		
6	Holdings	Books (Default)			Shared		
7	LCNAMES (Network)	Personal Name (Default)			Shared		
8	LCSH (Network)	Topical Term (Default)			Shared		
9	NETWORK (Network)	Local Authority template (Default)			Shared		
10	MARC21 Bib	Accession			Shared		
11	MARC21 Bib	Books			Shared		

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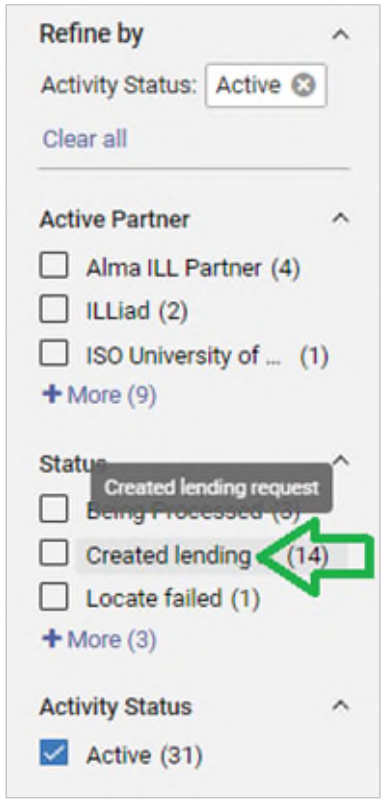
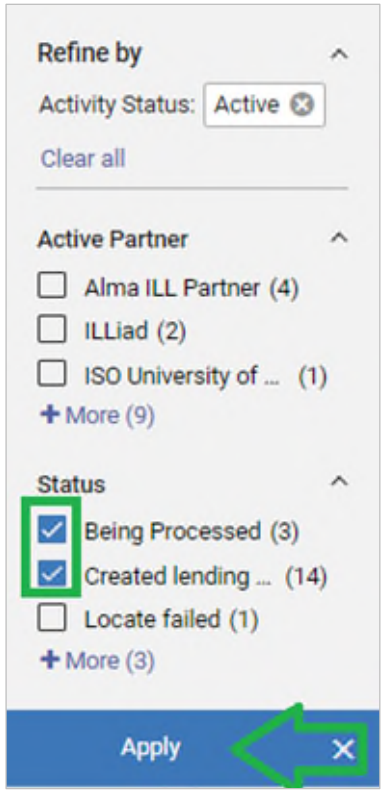
The New UX and What it Can Do for You

Multi-Select Facets

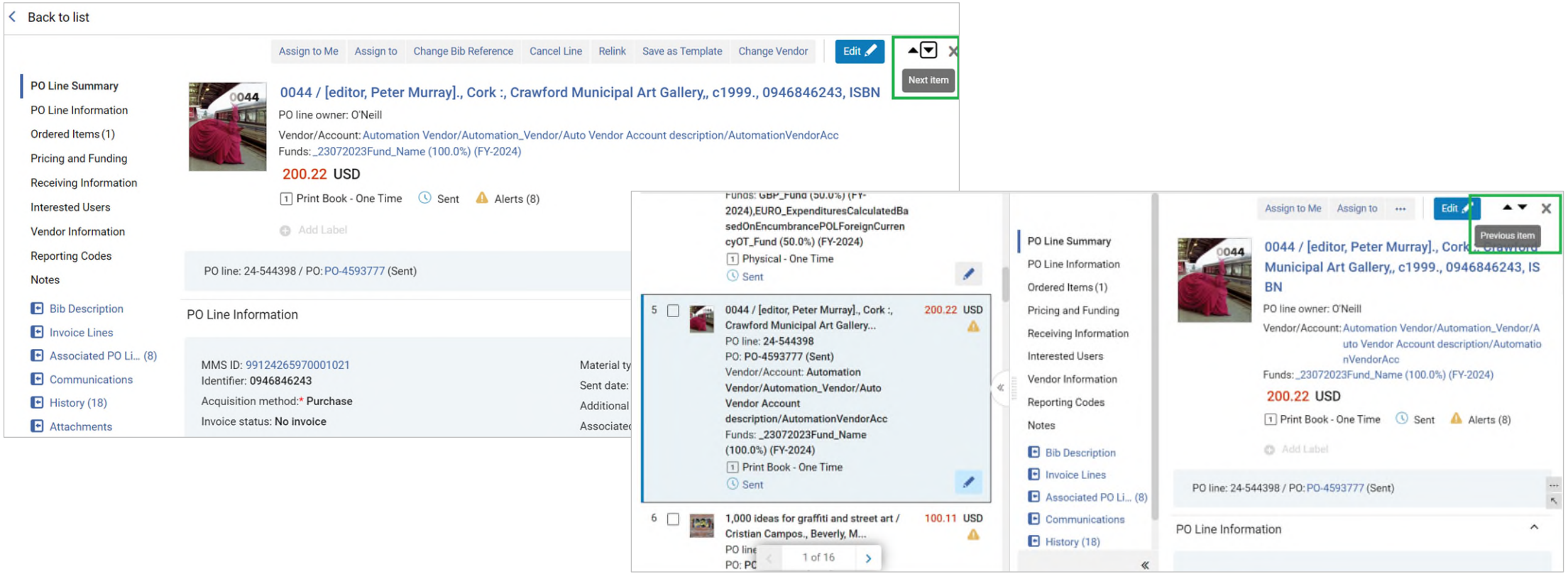
Single click on a single value, or select multiple values and apply





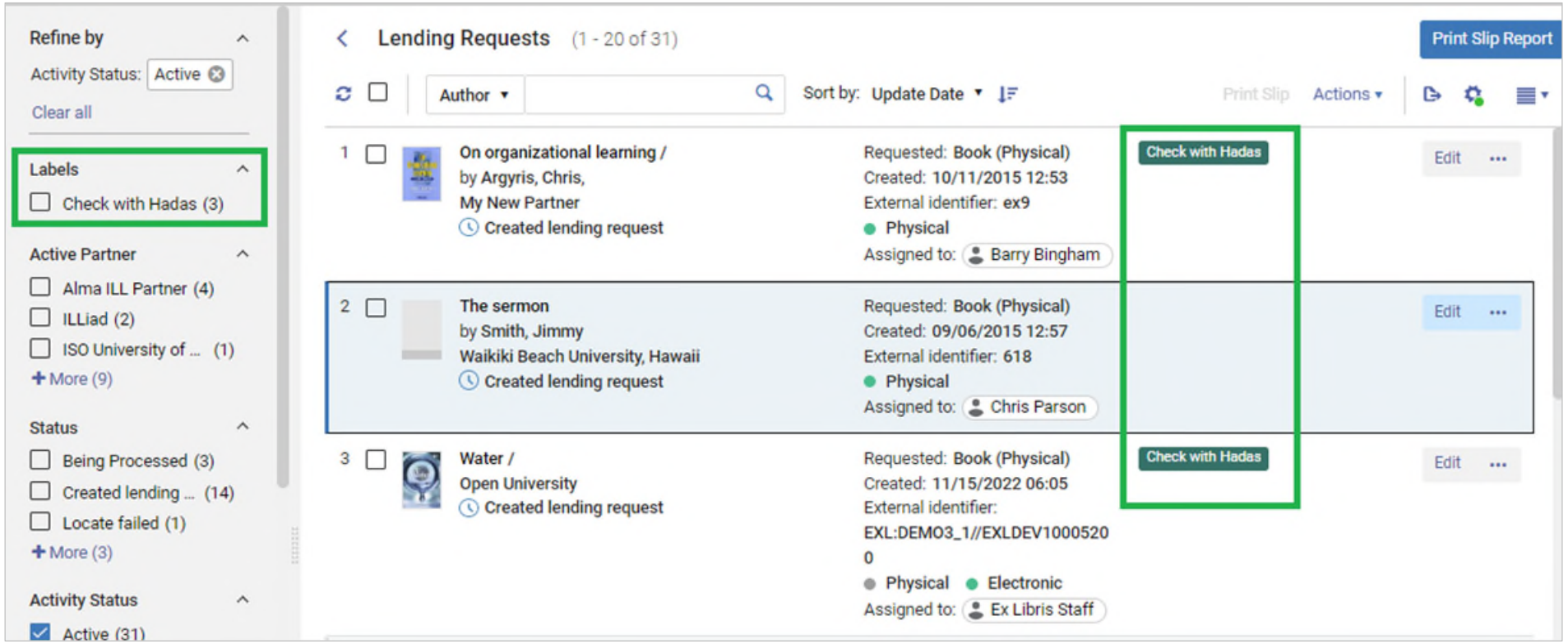
Move Between Search Results

Use the up/down arrows to move to previous/next item, in full view or split-screen



Add Labels to Easily Identify Items Requiring Work

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



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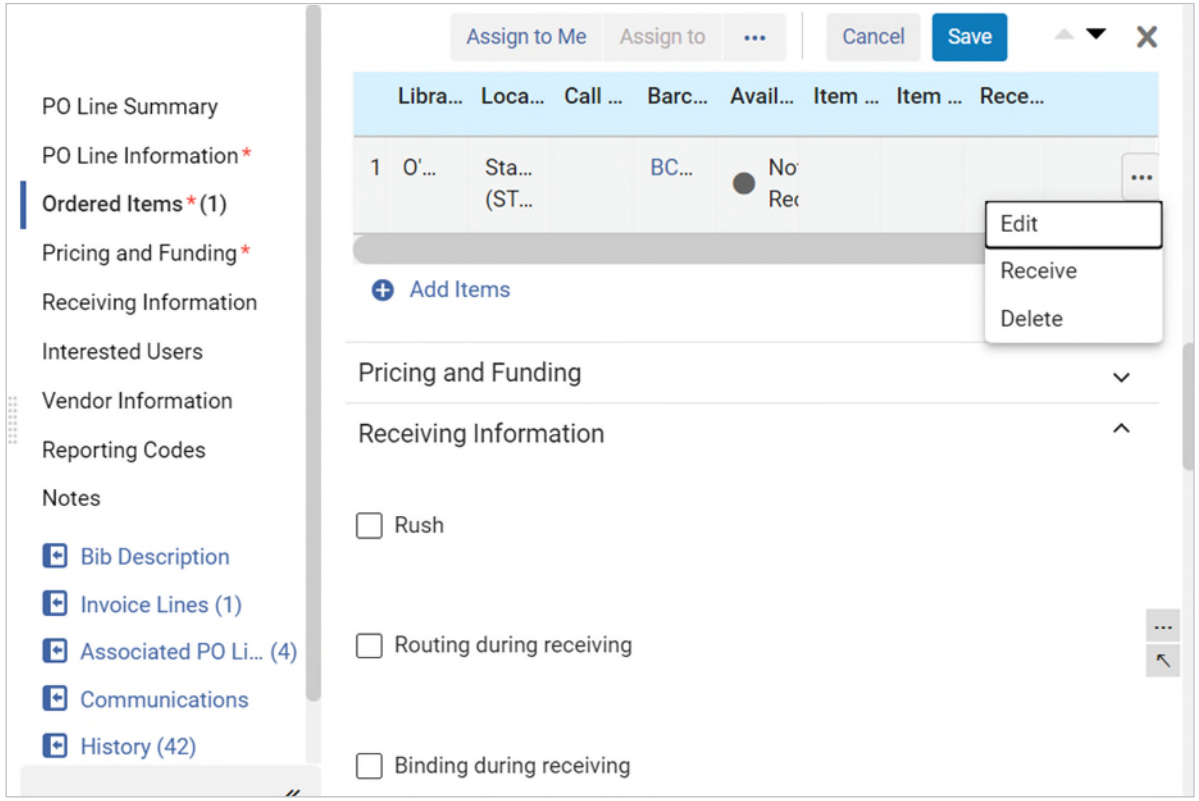
Make Some Changes Directly from Search Results

Add notes, receive item directly from POL, etc.



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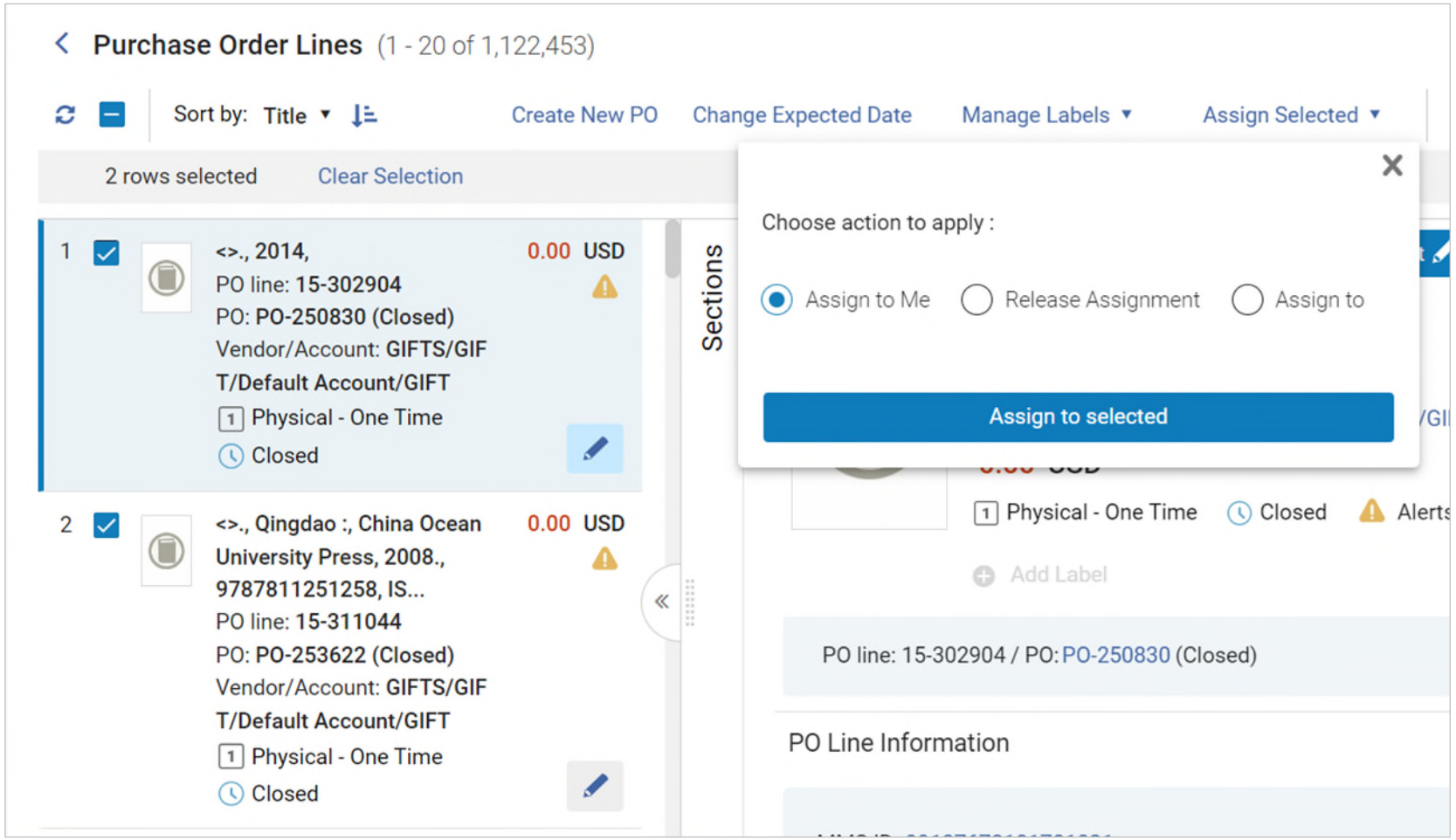
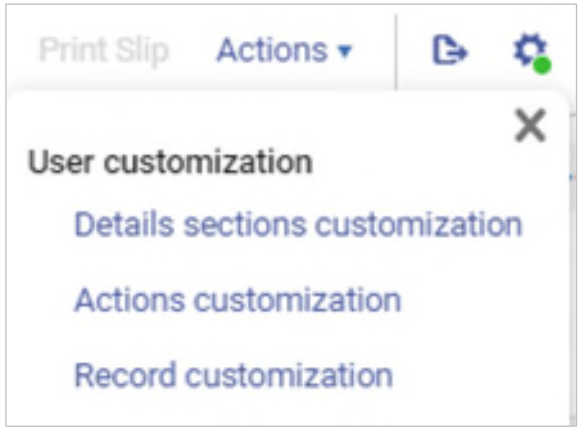
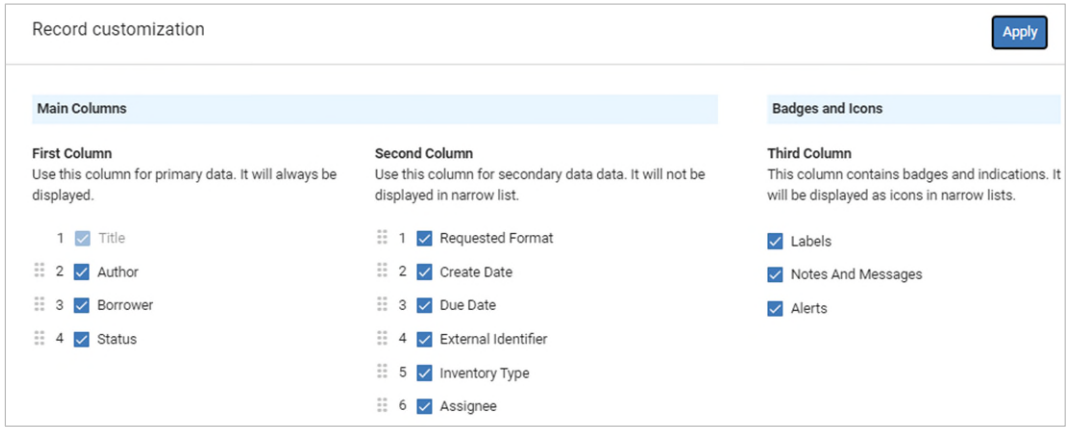
Assign Multiple POLs

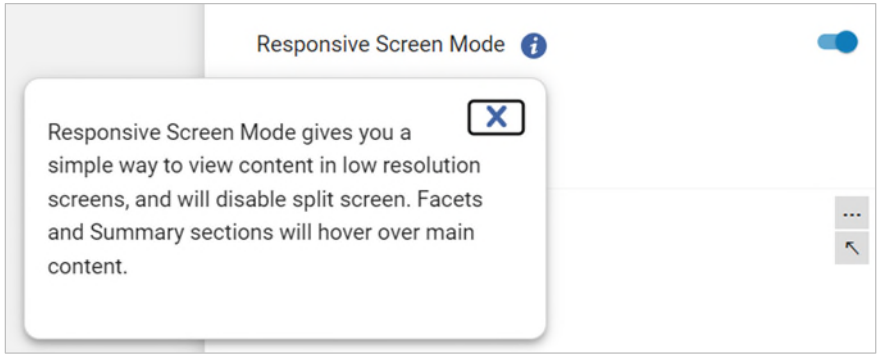


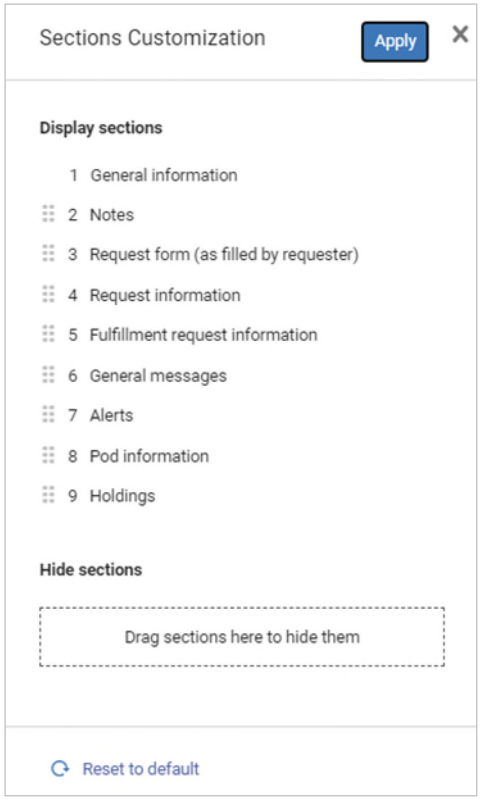
Choose What You See Where

Configuring the display of actions, sections, brief results and responsive mode









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