

ExLibris
Part of **Clarivate**

IGOLU
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



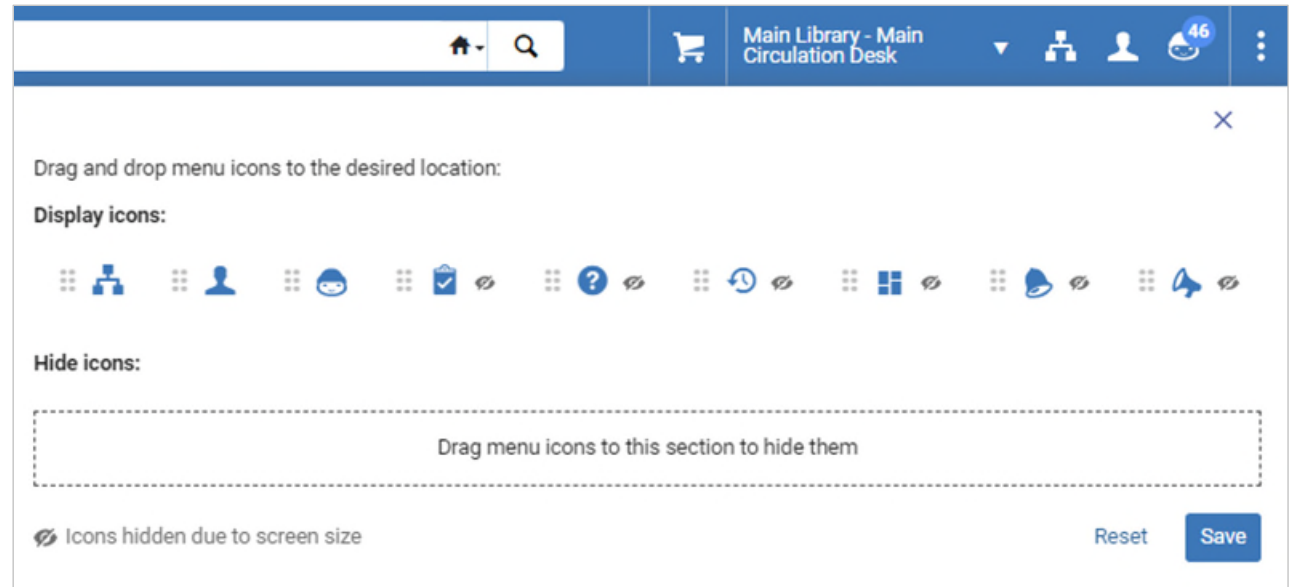
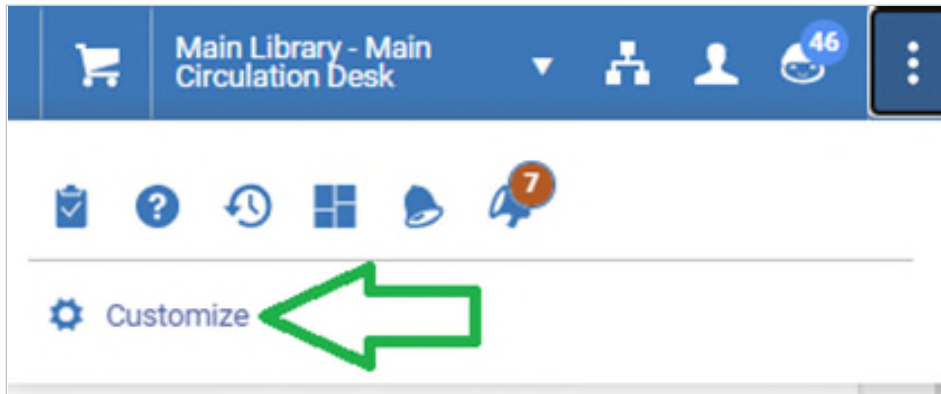
The new UX and what it can do for you



UI Preferences & Personalization Options

Configuring the Persistent Menu

Easy access to your commonly used actions



UI Preferences

The screenshot shows a user interface for a library system. At the top, a blue navigation bar contains a shopping cart icon, the text "Main Library - Main Circulation Desk", a user profile icon (highlighted with a green box), a notification bell with "46", a checkmark, a question mark, and a menu icon. Below this, a dropdown menu is open, showing the user's name "Ford Prefect" and "User Details" with a close button. The menu also includes "English", "Change Password", "UI preferences" (highlighted with a green box), "Feature Rollout Configuration", and "Sign out". The "UI preferences" section is further detailed, showing "Display density" with three radio button options: "A" (small), "A" (medium, selected), and "A" (large). Below this is "Shortcuts customization" and "Feature Rollout Configuration".

Display Density

The image displays two overlapping screenshots of a library catalog interface, illustrating the 'Display Density' feature. Both screenshots show search results for 'Physical Titles (1 - 16 of 16) nice' with facets for Material Type, Resource Type, Language, and Publication Year.

Top Screenshot (Compact View):

- Facets:** Material Type (Book (10), Music (5), Visual material (1)), Resource Type (Audio musical - Physical (5), Book - Physical (10), Projected medium - Physi... (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)).
- Search Results:** 1. **A lover would be nice / by F. Hugh Herbert.** 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.** 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.

Bottom Screenshot (Expanded View):

- Facets:** 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)), Publication Year (1916 - 1967 (4), 1978 - 1989 (3), 1994 - 1999 (4), 2000 - 2012 (5)).
- Search Results:** 1. **A lover would be nice / by F. Hugh Herbert.** 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.

User Interface Elements:

- Display Density Control:** Located in the 'UI preferences' section of the user details panel. It features three buttons: 'Compact' (selected in the top view), 'Expanded' (selected in the bottom view), and 'Default'.
- User Details Panel:** Shows the user 'Ford Prefect' with options for 'English', 'Change Password', and 'Shortcuts customization'.

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 'Manage Widgets' dialog box in the Alma Home Page. The dialog has a title bar with a close button (X) and a table with the following columns: Active, Widget name, and Description. The table lists several widgets, with 'Scheduled Jobs Status' being the only one checked.

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

A green arrow points to a plus sign icon in the top right corner of the home page interface, indicating where to click to manage widgets.

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

The screenshot shows the Alma Home Page navigation menu. The menu is dark blue with white text and icons. The 'Analytics' option is highlighted. A search box is visible in the 'Usage Tracking' section, and a dropdown menu is open showing 'Alma Homepage' and 'Usage Tracking'.

The screenshot shows the Alma Analytics dashboard. The dashboard features three large cards for 'Total Analytics Queries', 'Total Rows Retrieved', and 'Average Running Time per Query (seconds)'. Below these are two charts: 'Query Success Rate' (a pie chart showing 98.95% success and 1.05% failure) and 'Query Trend - Last two years' (a bar chart showing the number of queries over time).

Metric	Value
Total Analytics Queries	111,735
Total Rows Retrieved	2,756,218
Average Running Time per Query (seconds)	10.24

Query Status	Percentage
Query completed successfully	98.95%
Query failed	1.05%

Configuring Columns Display in Tables

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

< List of Items Back

The George and Ira Gershwin songbook [sound recording] / [performed by] Ella Fitzgerald. Gershwin, George, 1898-1937. Verve [S.I.] : New York, N.Y. : p1978. >

1 - 1 of 1 Barcode Sort routine 0 rows selected Manage Selected Add Item

▼ Status : All ▼ Year : All ▼ Volume : All ▼ Description : All ▼ Receive Date : All ▼

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Access Number
1 <input type="checkbox"/>	33550-10	Main Libr...	General	30236	-	-	-	-	No	Item in place	-	-

Material Type
 Item Policy
 Copy ID
 MMS ID
 Provenance
 Storage location ID

➔



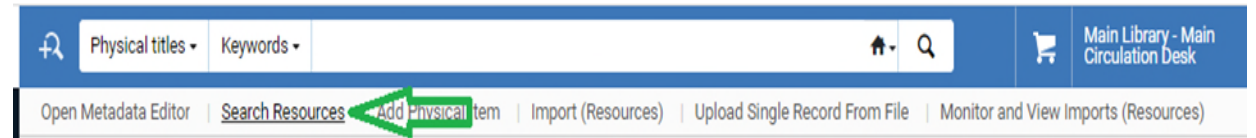
Tools to Increase Efficiency

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



Find any link in main menu

Quick links menu

- | | | |
|---|--------------------------------------|------------|
| 1 | Open Metadata Editor | Ctrl+Alt+1 |
| 2 | Search Resources | Ctrl+Alt+2 |
| 3 | Add Physical Item | Ctrl+Alt+3 |
| 4 | Import (Resources) | Ctrl+Alt+4 |
| 5 | Upload Single Record From File | Ctrl+Alt+5 |
| 6 | Monitor and View Imports (Resources) | Ctrl+Alt+6 |

- Unpin Quick Links menu
- Clear Quick Links menu
- Customize main menu links
- Collapse menu

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

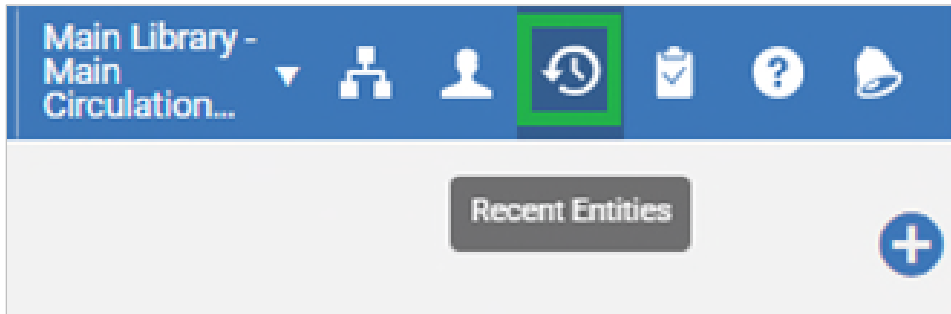
The screenshot displays the 'Records - Quick links menu' in the Metadata Editor. The menu items are:

Item	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

Below the menu is an 'Unpin Quick links menu' option. A note at the bottom states: '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'.

Recent Entities

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



Recent Entities ★ ×

▼ All Entities ▼ 🔍

Today ^

A short history of nearly everything / Bill Bryson. 03/30/2023
Book - Physical
992739610000121
Bibliographic Records | Edited ✎ ×

Fractals everywhere / Michael F. Barnsley ; revised with the assistance of Hawley Rising III ; answer key by Hawley Rising III., Cambridge, Massachusetts ; London... Edit entity 023
Print Book - One Time
POL-63540
PO Lines | Edited

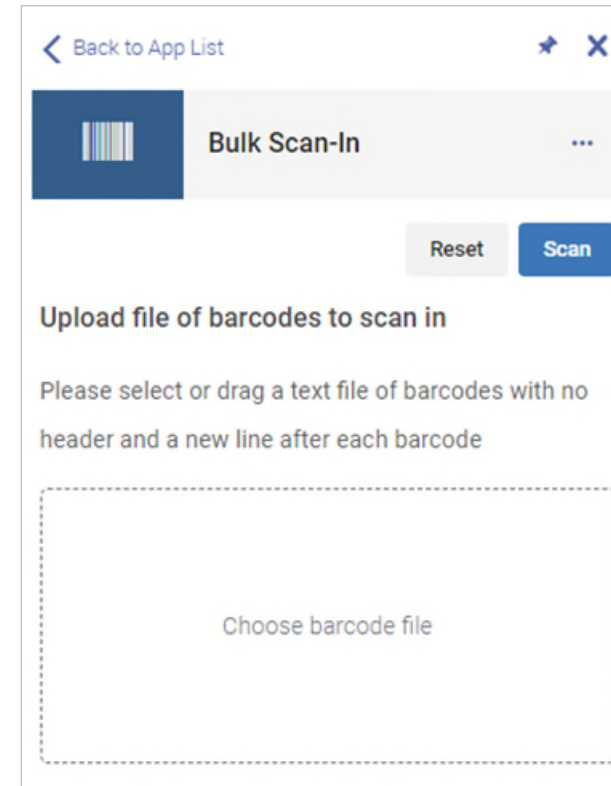
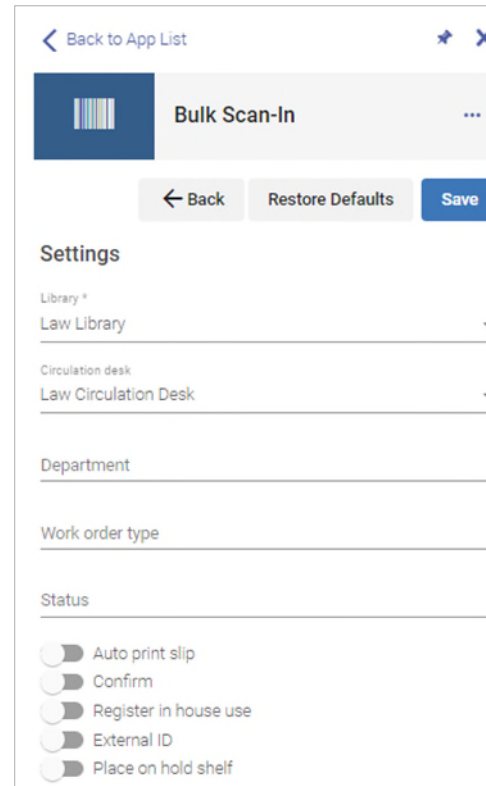
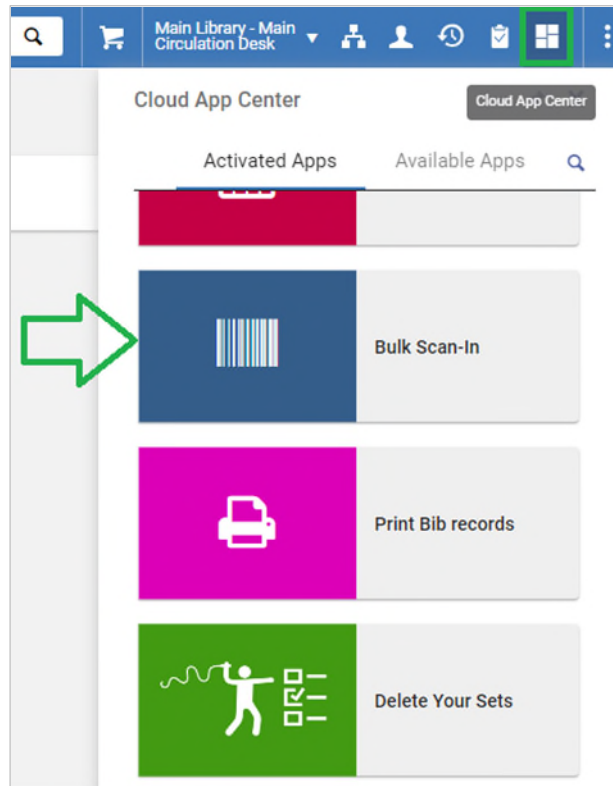
The watcher at the nest. Illustrated by Roger Tory Peterson. Nice, Margaret Morse, 1883-1974. Dover Publications New York, [1967] 03/30/2023
100160-000010
Physical Items | Edited

- 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

Cloud Apps

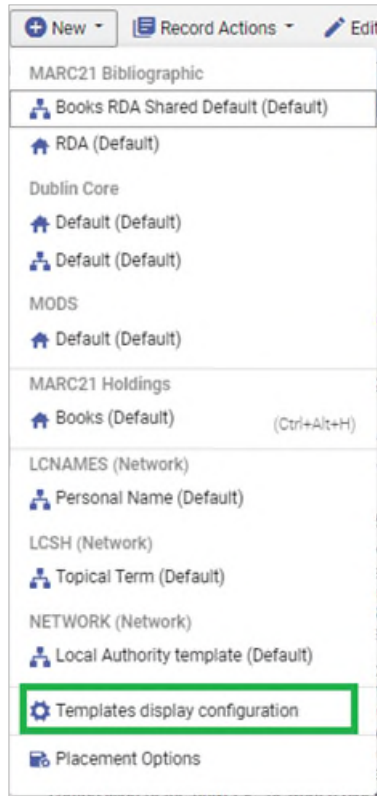
Useful [apps](#) which increase efficiency

E.g., [Bulk Scan In](#): scan in multiple items at a specific desk/department



MDE Templates Display Configuration

Select commonly used templates to display in "New"



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

Refine by ^

Activity Status: ✕

[Clear all](#)

Active Partner ^

Alma ILL Partner (4)

ILLiad (2)

ISO University of ... (1)

[+ More \(9\)](#)

Status ^

Created lending request

Being Processed (3)

Created lending (14)

Locate failed (1)

[+ More \(3\)](#)

Activity Status ^

Active (31)

Refine by ^

Activity Status: ✕

[Clear all](#)

Active Partner ^

Alma ILL Partner (4)

ILLiad (2)

ISO University of ... (1)

[+ More \(9\)](#)

Status ^

Being Processed (3)

Created lending ... (14)

Locate failed (1)

[+ More \(3\)](#)

[Apply](#) ✕

Move Between Search Results

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

The screenshot displays a library catalog interface with search results and navigation options. The main view shows a search result for item 5, which is a book titled "0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery, c1999., 0946846243, ISBN". The price is 200.22 USD. The interface includes a sidebar with navigation options like "Bib Description", "Invoice Lines", and "Associated PO Li... (8)". The top navigation bar contains buttons for "Assign to Me", "Assign to", "Change Bib Reference", "Cancel Line", "Relink", "Save as Template", "Change Vendor", and "Edit". A "Next item" button is highlighted with a green box. The bottom view shows a list of search results, with item 5 selected and item 6 visible below it. The "Previous item" button is also highlighted with a green box.

Back to list

Assign to Me Assign to Change Bib Reference Cancel Line Relink Save as Template Change Vendor Edit

0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery, c1999., 0946846243, ISBN

PO line owner: O'Neill

Vendor/Account: Automation Vendor/Automation_Vendor/Auto Vendor Account description/AutomationVendorAcc

Funds: _23072023Fund_Name (100.0%) (FY-2024)

200.22 USD

Print Book - One Time Sent Alerts (8)

Add Label

PO line: 24-544398 / PO: PO-4593777 (Sent)

PO Line Information

MMS ID: 99124265970001021 Material ty

Identifier: 0946846243 Sent date:

Acquisition method: * Purchase Additional

Invoice status: No invoice Invoice associated

Funds: GBP_Fund (50.0%) (FY-2024),EURO_ExpendituresCalculatedBasedOnEncumbrancePOLForeignCurrencyOT_Fund (50.0%) (FY-2024)

Physical - One Time Sent

5 0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery... 200.22 USD

PO line: 24-544398

PO: PO-4593777 (Sent)

Vendor/Account: Automation Vendor/Automation_Vendor/Auto Vendor Account description/AutomationVendorAcc

Funds: _23072023Fund_Name (100.0%) (FY-2024)

Print Book - One Time Sent

6 1,000 Ideas for graffiti and street art / Cristian Campos., Beverly, M... 100.11 USD

PO line: PC 1 of 16

0044 / [editor, Peter Murray], Cork ; Crawford Municipal Art Gallery, c1999., 0946846243, ISBN

PO line owner: O'Neill

Vendor/Account: Automation Vendor/Automation_Vendor/Auto Vendor Account description/AutomationVendorAcc

Funds: _23072023Fund_Name (100.0%) (FY-2024)

200.22 USD

Print Book - One Time Sent Alerts (8)

Add Label

PO line: 24-544398 / PO: PO-4593777 (Sent)

PO Line Information

Navigation: Previous Item

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 with 31 items. The left sidebar shows a 'Refine by' section with 'Labels' selected and 'Check with Hadas (3)' highlighted in green. The main list shows three items, with the second item, 'The sermon' by Jimmy Smith, highlighted in blue. A green box highlights the 'Check with Hadas' button for the first and third items.

Item #	Title / Author	Requested	Created	External Identifier	Material Type	Assigned to	Label
1	On organizational learning / by Argyris, Chris, My New Partner	Book (Physical)	10/11/2015 12:53	ex9	Physical	Barry Bingham	Check with Hadas
2	The sermon by 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 0	Physical, Electronic	Ex Libris Staff	Check with Hadas

Make Some Changes Directly from Search Results

Add notes, receive item directly from POL, etc.

The screenshot displays a web application interface for managing a Purchase Order (PO) line. On the left is a sidebar with navigation options: PO Line Summary, PO Line Information*, Ordered Items*(1), Pricing and Funding*, Receiving Information, Interested Users, Vendor Information, Reporting Codes, Notes, Bib Description, Invoice Lines (1), Associated PO Li... (4), Communications, and History (42). The main area shows a table with columns: Libra..., Loca..., Call..., Barc..., Avail..., Item ..., Item ..., and Rece... The first row contains the value '1' in the first column, 'O...' in the second, 'Sta... (ST...' in the third, 'BC...' in the fourth, and 'No Rec' in the fifth. A context menu is open over the first row, offering 'Edit', 'Receive', and 'Delete' options. Below the table is an 'Add Items' button. Further down, there are sections for 'Pricing and Funding' and 'Receiving Information', with the latter containing checkboxes for 'Rush', 'Routing during receiving', and 'Binding during receiving'. At the top right of the main area are buttons for 'Assign to Me', 'Assign to', 'Cancel', and 'Save'.

Assign Multiple POs

The screenshot shows a web application interface for managing Purchase Order Lines. At the top, there is a header with a back arrow, the title "Purchase Order Lines (1 - 20 of 1,122,453)", and several action buttons: "Sort by: Title", "Create New PO", "Change Expected Date", "Manage Labels", and "Assign Selected". Below the header, there is a selection bar indicating "2 rows selected" and a "Clear Selection" button. The main content area displays two rows of purchase order lines. Each row includes a checkbox, a trash icon, a title, a price in USD, a warning icon, and a "Physical - One Time" status. A "Sections" sidebar is visible on the right. A modal dialog is open over the first row, titled "Choose action to apply:", with three radio button options: "Assign to Me" (selected), "Release Assignment", and "Assign to". A blue button labeled "Assign to selected" is at the bottom of the modal. Below the modal, there is an "Add Label" button and a text box containing "PO line: 15-302904 / PO: PO-250830 (Closed)".

Purchase Order Lines (1 - 20 of 1,122,453)

Sort by: Title | Create New PO | Change Expected Date | Manage Labels | Assign Selected

2 rows selected | Clear Selection

Row	Title	Price	Status
1	<>., 2014, PO line: 15-302904 PO: PO-250830 (Closed) Vendor/Account: GIFTS/GIFT/Default Account/GIFT Physical - One Time Closed	0.00 USD	Closed
2	<>., Qingdao :, China Ocean University Press, 2008., 9787811251258, IS... PO line: 15-311044 PO: PO-253622 (Closed) Vendor/Account: GIFTS/GIFT/Default Account/GIFT Physical - One Time Closed	0.00 USD	Closed

Sections

Choose action to apply :

Assign to Me Release Assignment Assign to

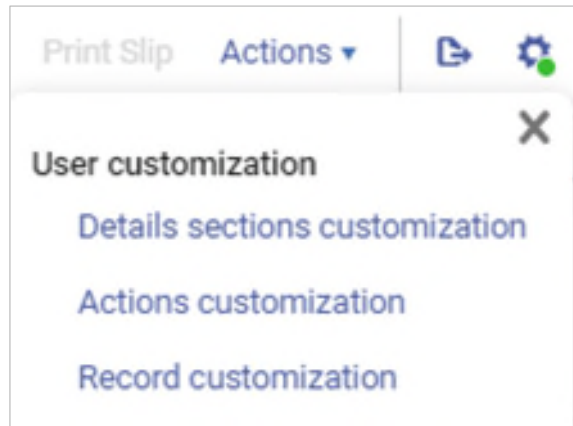
Assign to selected

PO line: 15-302904 / PO: PO-250830 (Closed)

PO Line Information

Choose What You See Where

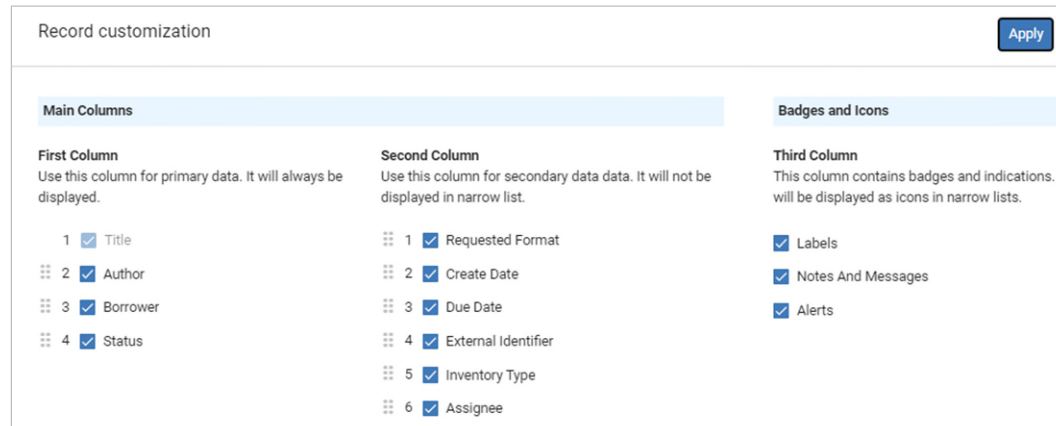
Configuring the display of actions, sections, brief results and responsive mode



Print Slip Actions

User customization

- Details sections customization
- Actions customization
- Record customization



Record customization

Main Columns

First Column
Use this column for primary data. It will always be displayed.

- 1 Title
- 2 Author
- 3 Borrower
- 4 Status

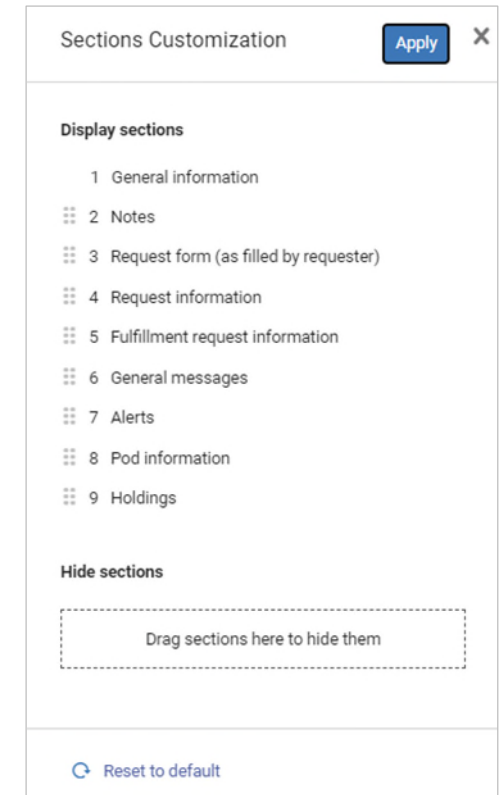
Second Column
Use this column for secondary data data. It will not be displayed in narrow list.

- 1 Requested Format
- 2 Create Date
- 3 Due Date
- 4 External Identifier
- 5 Inventory Type
- 6 Assignee

Badges and Icons

Third Column
This column contains badges and indications. It will be displayed as icons in narrow lists.

- Labels
- Notes And Messages
- Alerts



Sections Customization

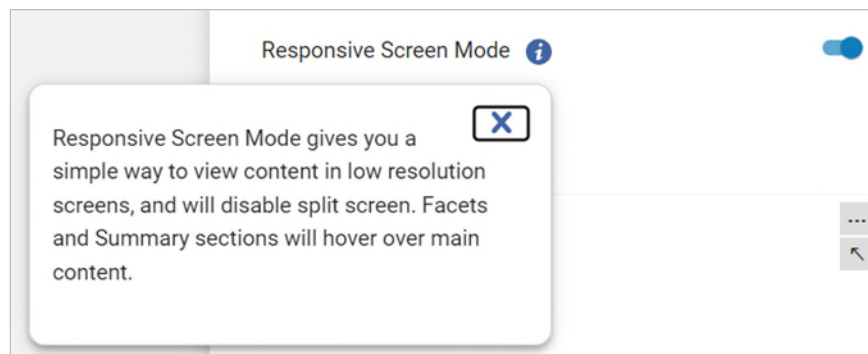
Display sections

- 1 General information
- 2 Notes
- 3 Request form (as filled by requester)
- 4 Request information
- 5 Fulfillment request information
- 6 General messages
- 7 Alerts
- 8 Pod information
- 9 Holdings

Hide sections

Drag sections here to hide them

Reset to default



Responsive Screen Mode

Responsive Screen Mode gives you a simple way to view content in low resolution screens, and will disable split screen. Facets and Summary sections will hover over main content.



Thank You!

Lili Daie
Lili.Daie@clarivate.com

© 2023 Clarivate

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.