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Alma December 2015 Release Highlights

Acquisitions

- **Invoice Line Audit History** – This important new feature provides a full audit trail of the invoice and its lines. Changes available to view in the History tab will give invoice operators and managers a useful tool for tracking changes made to the invoice.

Resource Management

- **Shelf Report for Managing Physical Item Inventory (available with the December HF)** – The new Shelf Report functionality allows staff to manage the library's physical inventory in order to track whether items are in place, "mis-shelved" or missing.
- **Managing UNIMARC Local Authority Records** – Alma now provides the capability for managing UNIMARC local authority records. You can now create your own UNIMARC authority profile for managing local authorities as well as authority record import profiles for importing UNIMARC records.

Fulfillment

- **Patron Notifications for Fines and Fees** – This great new enhancement allows libraries to set up a series of notifications to patrons on fines/fees owed, thereby providing improved services in the case of delinquent payments by patrons. Notifications can be sent by email and/or SMS. You can define the notification frequency according to the amount owed, fine/fee owner, and/or user group. Notifications may also be printed.
- **Course Loader Integration Profile** – Course information can be imported from your course management system. Alma supports this using the Course Loader integration profile that runs on a library-configured schedule.

Resource Sharing

- **Support for CCC GetItNow Service in Resource Sharing** – This enhancement allows libraries to use the CCC GetItNow service in a mediated manner, in cases where they do not want to have this as an open service to all patrons.

Analytics

- **Additional Configurations for Analytics Jobs** – Alma now provides the option for a staff user to choose specific scheduled times for scheduled reports and dashboards instead of the current hard-coded Daily, Weekly, and Monthly options, so that a time can be chosen to coincide with the ETL completion.
- **Number of Loans** – Two new fields were added to the Physical Item Details dimension of the Physical Items subject area: Number of Loans (In House) and Number of Loans (Not In House). These fields enable you to create reports that differentiate between items that were used in the library, but not actually loaned, and items that were actually loaned.
- **Citation Attribute, Material Type, and Copyright Status Fields Added to Course Reserves** – Alma enables you to add attributes to citations. These attributes are configurable and can be grouped into attribute types. You can now display the citation attributes in an Analytics report. To support this functionality, the Citation Attribute fields (1-5) were added to the Reading List Citation dimension of the Course Reserves subject area.
- **Resource Sharing Audit Statistics Added to Analytics** – Actions taken on resource sharing borrowing or lending requests (such as changing the request's status or adding a shipping cost) are available from the Audit tab when editing a resource sharing request. This information can now be displayed in an Analytics report.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for this release of Alma.

Alma Show Me How

Description

Alma Show Me How provides a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options, such as a check box, and direct you to the documentation that describes the new options in further detail.

Step-by-Step Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

1. From the Alma home page, click the **Show Me How** button.

   The How Can We Assist You? pop-up window displays.

2. Select one of the processes in order to start the prompted step-by-step instructions.

   For this release, pop-ups are available for the following:

   - PO Line UI Improvements Related to Invoices
   - Invoice Line Audit History
   - Level of Service for Resource Sharing Requests
   - Additional Configurations for Analytics Jobs

Alma Videos

The following new videos are available from the Show Me How menu, and when you select **Help > What's New Videos** in Alma:

- Invoice Line Audit History
- Managing UNIMARC Local Authority Records
- Shelf Tool for Managing Physical Item Inventory (available with the December HF)
- Support for CCC GetItNow Service in Resource Sharing
- Level of Service for Resource Sharing Requests
- Additional Configurations for Analytics Jobs

Particular Issues to Note

- With the January 2016 release, the new management system for digital resources maintained in Alma will be made available to all customers.

Making the Most of This Release

The following release note features require actions or decisions on the part of your institution in order to implement:

Action Items
☐ Shelf Report for Managing Physical Item Inventory (available with the December HF) - Is it the time of year for stock taking? Check out the new Shelving Report functionality, which provides an efficient process for managing your library's inventory. Using this functionality, staff will be able to manage physical inventory to see whether items are in place, "mis-shelved," or missing.
☐ Patron Notifications for Fines and Fees - If you want to improve notification to your patrons about their owed fines, consider using the new configurable profiles to notify patrons who owe more than a given amount for more than a given period of time.
☐ Support for CCC GetItNow Service in Resource Sharing - Looking for new services that will enable you to quickly obtain digital resources for your patrons? Consider using this new option to obtain requested resources from CCC's GetItNow service.
☐ Level of Service Management - If you're looking for ways to allow your patrons to place special resource sharing requests, you can now allow them to specify the level of service they want for the resource they need. Just switch on the new option to designate a required level of service for a resource sharing request.
☐ Additional Configurations for Analytics Jobs - These great new options enable your staff to obtain the scheduled report when they need it, and choose a schedule to better coincide with ETL completion.

Acquisitions

The following sections describe new or changed Acquisitions features in this release of Alma.

Invoice Line Audit History

Description

Changes to invoice lines are now tracked and available to view in the **History** tab of the Invoice Details page. This extends last month's feature to track changes made to invoices, providing a full audit trail of the invoice and its lines. Audit history gives invoice operators and managers a useful tool to understand what happened with an invoice, when it happened, and who performed the change.

Tracked invoice changes include:

- The date and time of the change
- The user that made the change
- The invoice line number
- The changed fields, with the old and new values

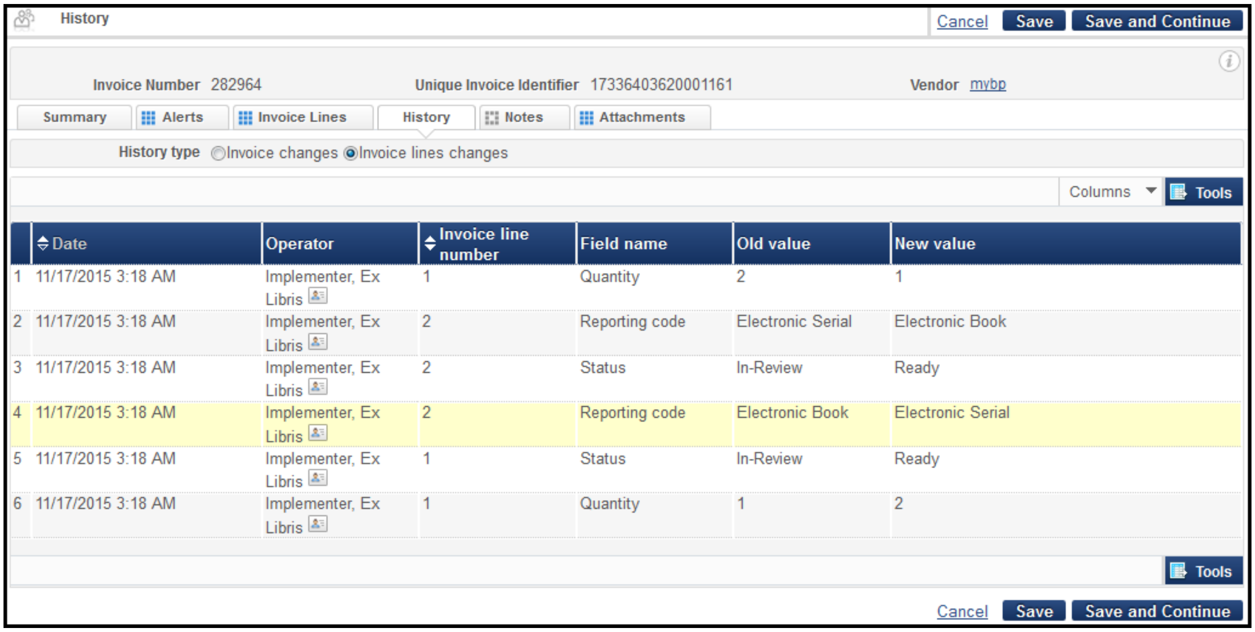


Figure 1 - Invoice Line History

Step-by-Step Instructions

The following roles can view invoice line history:

- Invoice Operator
- Invoice Operator Extended
- Invoice Manager

To view an invoice line's history:

1. Open an invoice and select the **History** tab.

   The invoice's History page appears. For more information, see **Invoicing** in the *Alma Acquisitions Guide* or *Alma Online Help*.

2. For the **History type** field, select **Invoice lines changes**.

   The list of invoice line changes appears.

Other Acquisitions Enhancements

- Ex Libris now partners with Open Exchange Rates to enhance Alma's support for exchange rate currencies. Open Exchange Rates provides regularly updated exchange rates for 165 world currencies (as of now). Support for additional currencies is added automatically to Alma as Open Exchange Rates adds them.

  For the current list of supported currencies, see https://openexchangerates.org/currencies.

  In particular, the currencies New Taiwan Dollar (TWD) and Hong Kong Dollar (HKD) were added to Alma.

- You can now relink PO lines to bibliographic records that have requests associated with them.

- You can now configure email notifications for EDI jobs in the **EDI Information** tab when configuring a vendor. This makes it easier for vendor managers to set up notifications about EDI jobs.

  The **Input Job Parameters** section in this tab was divided into two sections, **Job Scheduling** and **Job Parameters**. The button **Email Notification** was added to the **Job Scheduling** section. Clicking this button opens the Email Notifications for Scheduled Jobs page. For more information, see **Configuring Email Notifications for Scheduled Jobs** in the *Alma Administration Guide* or *Alma Online Help*.

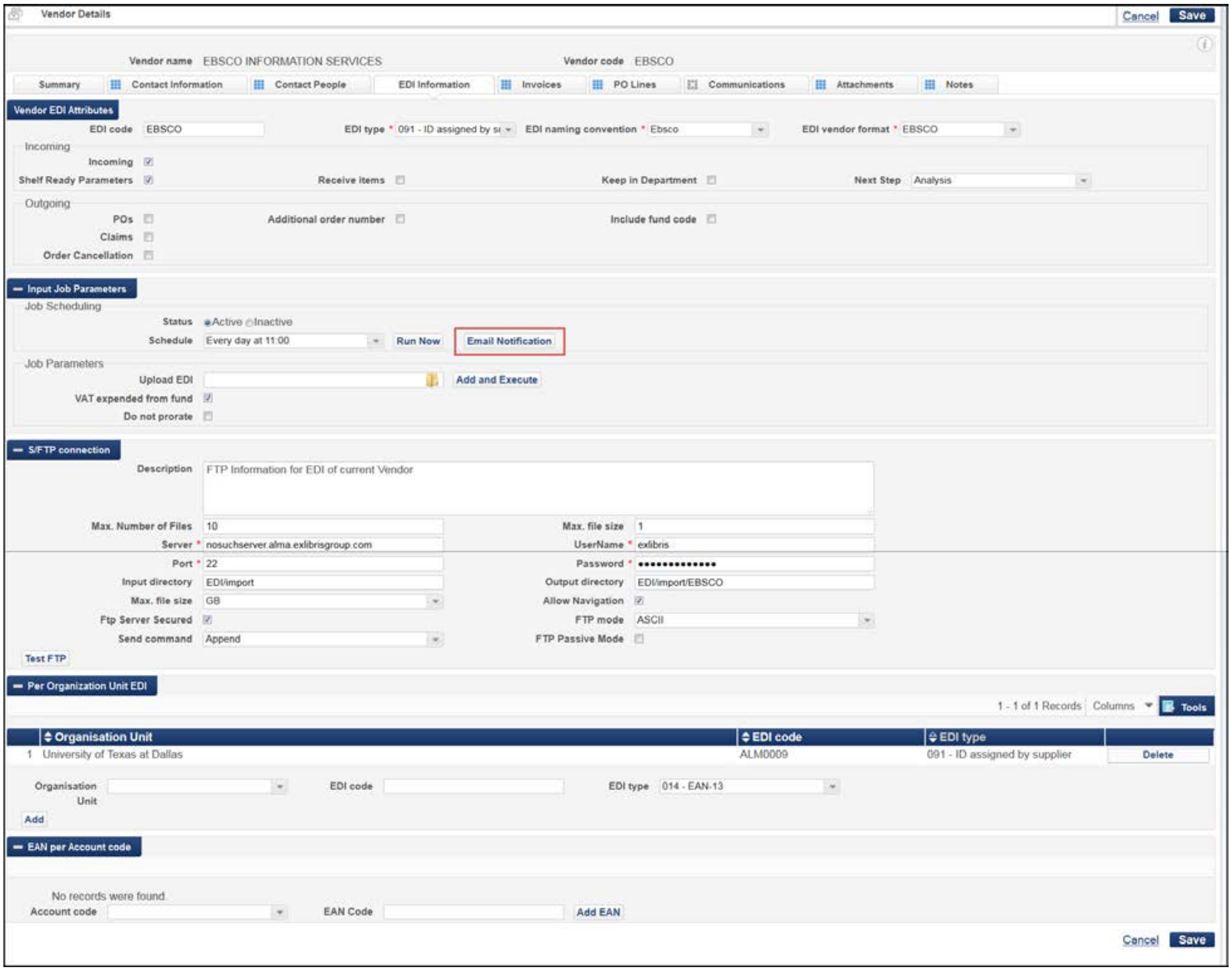


Figure 2 - Vendor Details EDI Notifications Tab

- In order to improve the navigation experience in the Acquisition pages, the columns **Subscription From Date**, **Subscription To Date**, and **Additional Information** were added to the **Invoice Lines** tab while viewing a PO line. This saves the user from having to navigate to the other pages to see this information. These fields are always empty for non-subscription orders.

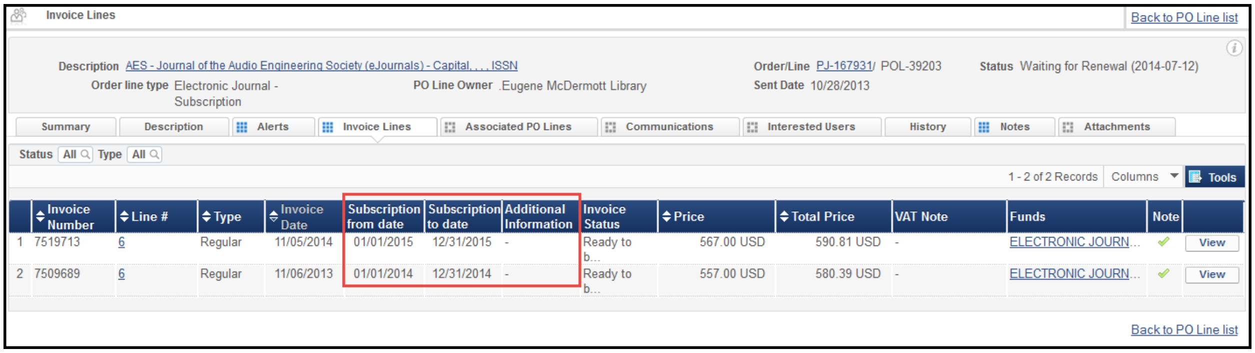


Figure 3 - PO Line Invoice Lines Tab

- The field **Amount paid in current FP** was added to the **Summary** tab while viewing a PO line. The value shown is the total amount paid so far during the current fiscal period (the sum of all expenditures, not including disencumbrances. This field appears only for subscription orders.

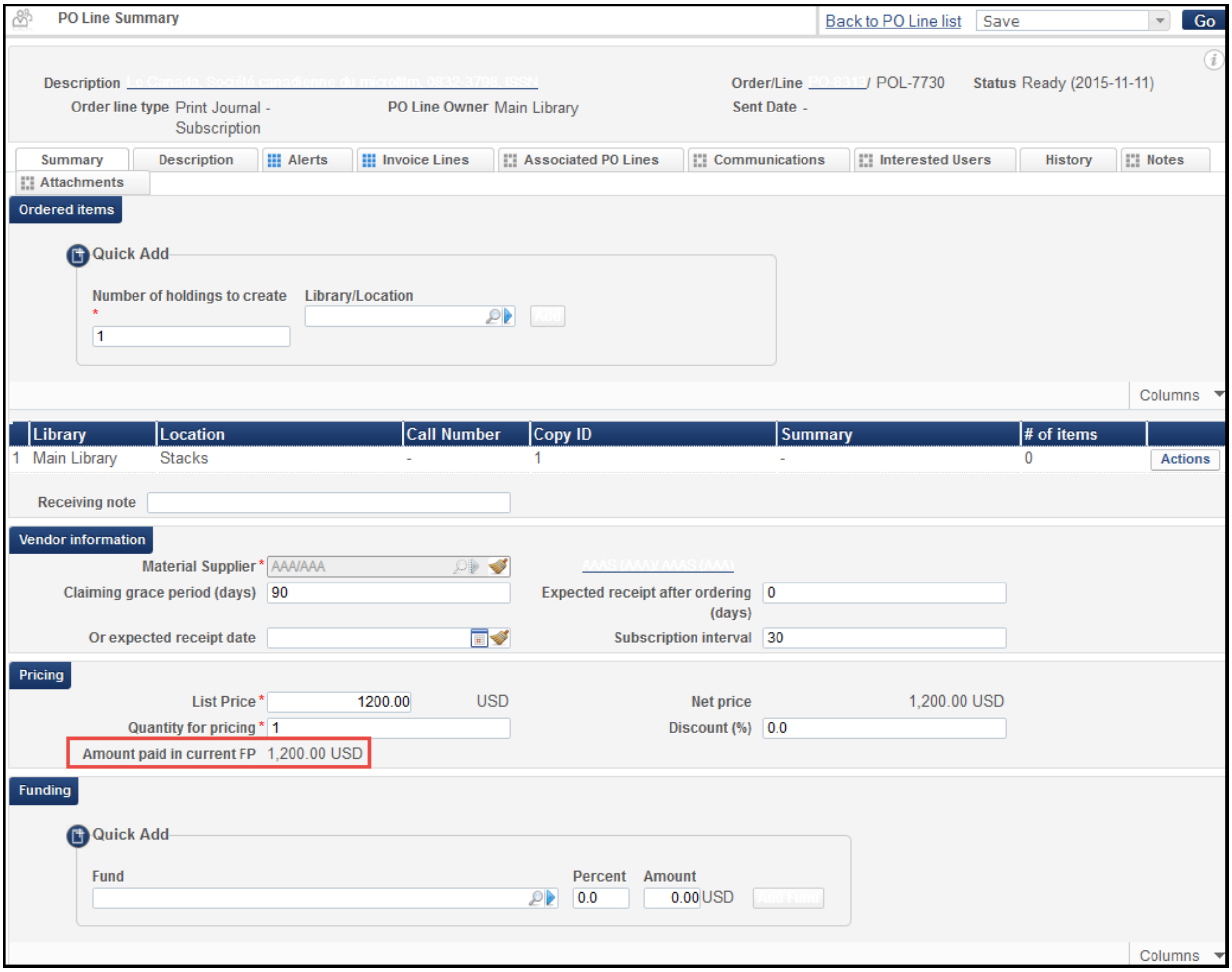


Figure 4 - PO Line Summary Tab

- When searching for PO line, you can now edit PO lines that are linked to trials from the list of search results. In the list of search results, a PO line linked to a trial now appears with the link **Go to Task List** beneath it. Clicking this link opens the Manage Trials page.

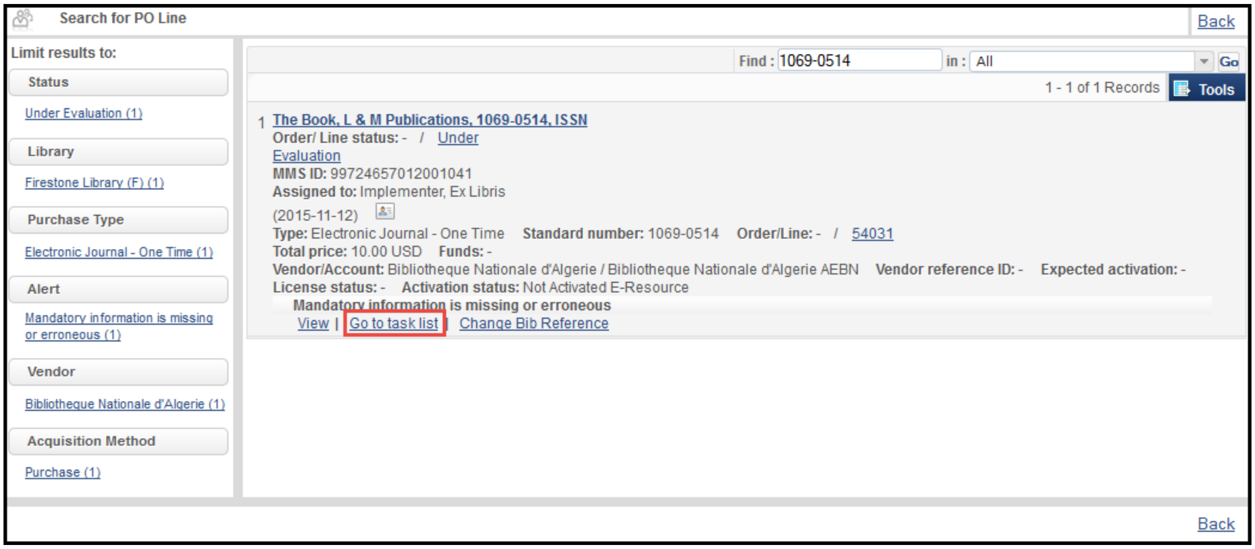


Figure 5 - PO Line Linked to a Trial

- The vendor's "additional_code" was added to the new XSD in an exported invoice.

```
<vendor>
   <code>2211014473350001488</code>
...
   <additional_code>4410123922</additional_code>
...
</vendor>
```

- Barcodes are now case-insensitive on the Receiving Items page.

Resource Management

The following sections describe new or changed Resource Management features in this release of Alma.

Shelf Report for Managing Physical Item Inventory (available with the December HF)

Description

The Shelf Report provides you with an efficient process for managing the library's inventory. Using the Shelf Report functionality, you are able to manage Physical Inventory to see if items are in place, "mis-shelved," or missing.

You can take an Excel file or a .txt file containing barcodes and compare that information with the information stored in the Alma database to identify items that are "mis-shelved" or are missing from inventory. Specify the following criteria to identify the records in Alma that you want to compare with the Excel or .txt file:

- Library
- Location
- Alma inventory range (by call number) or Alma inventory set (by set name)

The Shelf Report tool runs the Shelf Report job that provides a report with the following information to help you identify where you have issues with your physical inventory:

- Number of items in place
- Number of missing items that are marked in place in the database
- Number of items on the shelf but are marked in place in the database
- Number of known items that are not in place
- Number of items on the shelf but are out of the range specified or not in the set specified
- Number of barcodes with no matched item in the database

From the report results, you can access a robust set of options for managing your inventory. You can preview the items flagged in the report (from the Repository Search results page), create an itemized set of the items flagged in the report, or download a list of barcodes (for items with no match).

A new privilege **SHELF_REPORT_OPERATOR** was added to the **Fulfillment Services Manager**, **Physical Inventory Operator**, and **Repository Manager** roles. These roles can access the Shelf Report page and submit shelf report jobs.

Step-by-Step Instructions

The following role can process Shelf Report jobs:

- Fulfillment Services Manager
- Physical Inventory Operator
- Repository Manager

To submit a Shelf Report job:

Note: Review the procedure below in its entirety to understand what prerequisites must be completed before submitting a Shelf Report job.

1. Create the Excel or .txt file to be used by the Shelf Report job, for example by using a hand-held scanner. The file must contain the barcodes of the items that you want to check against the Alma inventory.
2. Open the Shelf Report page (**Resource Management > Manage Inventory > Shelf Report**).
3. In the Inventory section, identify the type of Shelf Report job you want to run by specifying **Range** or **Set** for the **Inventory definition** parameter.
4. For both **Range** and **Set** Shelf Report jobs, you must specify the **Library** and **Location** for the shelf inventory that you are checking. The library and location information defined in Alma is provided in drop-down lists from which you can select this information.
5. If you are submitting a **Range** Shelf Report job, provide the following additional criteria:
   - **Call number type** – The call number type such as **Library of Congress classification** or **Dewey Decimal classification**.
   - **From call number** – The beginning call number in the range of call numbers in the Alma inventory to be compared with the barcodes in the Excel or .txt file.
   - **To call number** – The last call number in the range of call numbers in the Alma inventory to be compared with the barcodes in the Excel or .txt file.

If you are submitting a **Set** Shelf Report job, provide the following additional criteria:

- **Set name** – The set of items.

Note: You may not select a set with more than 50,000 items.

6 In the **Select File** section, specify the Excel or .txt file to be used by the Shelf Report job. This is the file that you previously created (perhaps by using a hand-held scanner) that contains the barcodes of the items that you want to check against the Alma inventory that you have identified by either a range of call numbers or by a set that you have specified in the Inventory section above.

The format of the Excel or .txt should be one barcode per row, and the first row should be the heading **Barcode**. See below for an example.

	A
1	Barcode
2	32754083506752
3	32754083506753
4	32754083506754
5	32754083506760
6	

Figure 6 - Excel or .txt Barcode List

7 Click **Submit**. A Shelf Report job is queued for processing. See the procedure below for more information about the Shelf Report job.

To review the results of a Shelf Report job:

1 Open the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

2 When your Shelf Report job completes, click the **History** tab.

3 Select **Actions > Report** for the Shelf Report job that you want to review. Details of the job are provided in the following three sections on this page:

- Header information that provides the processing details of the job such as Process ID, start and end processing time, and so forth
- Job criteria that you specified in the Shelf Report request
- Analysis results of the comparison between the Alma inventory and the file of barcodes that you specified in the Shelf Report request

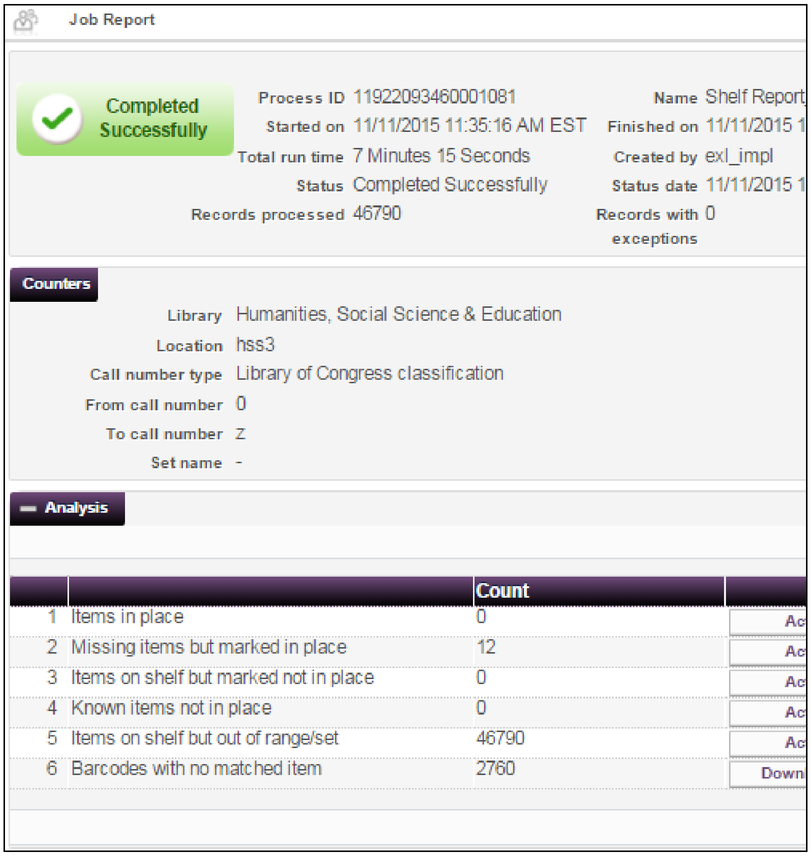


Figure 7 - Shelf Report Job Results

4 Expand the Analysis section to view the result details.

5 For rows 1 through 5 in the Analysis section, select **Actions > Preview Items** to view the results in the Repository Search results page or select **Actions > Create Itemized Set** to create a set that you can use for further processing. For row 6, select **Download List** to create an Excel or .txt file (determined by what you used in the Shelf Report request) to do further processing with the barcodes that had no matched items.

New Validation Options for Portfolio Activation

Description

Improvements to the validation component of portfolio activation/portfolio loader now enable you to run validation more efficiently in the following manner:

- It is now possible to ignore titles that have validation errors and continue loading titles with no errors.
- The validation runs in the background so that you do not need to wait for the completion of the process online.

Step-by-Step Instructions

The following roles can select the new validation options:

- Electronic Inventory Operator
- Repository Manager

To access the new activation validation options:

Note: This example shows the new validation options through the Activation Wizard. The same validation options are also available through the Portfolio Loader.

1 Complete a Repository Search from the **Community** tab for an electronic collection that you want to activate.

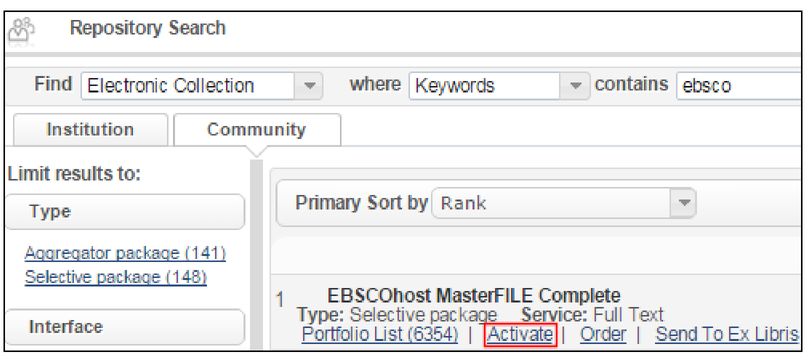


Figure 8 - Community Tab Search Results

2 Click **Activate**.

3 Complete the first page of the Activation Wizard as you normally do to include selecting the **Activate this electronic collection service** and/or **Automatically activate new portfolios** options in the Full Text Service section, and click **Next**.

4 Complete the second page of the Activation Wizard as you normally do, and click **Next**. Page three of the Activation Wizard appears with the following activation options in the Select Activation Type section:

- Activate all – Activation of the complete electronic collection with no selection of portfolios
- Activate electronic collection and selected portfolios via Excel file upload
- Manual activation – activate electronic collection and manually select portfolios

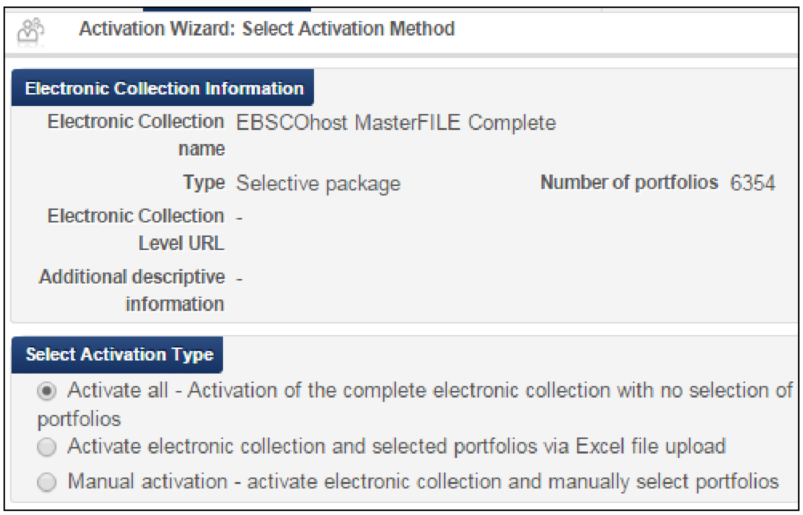


Figure 9 - Select Activation Type Section (Activation Wizard Page 3)

5 Select **Activate electronic collection and selected portfolios via Excel file upload**. Page 4 of the Activation Wizard appears with the following new validation options:

- Validate online
- Validate offline – recommended for large files

The **Validate online** option provides the same functionality that was available prior to this release. When you select the **Validate online** option and click **Next**, validation is processed immediately. If errors are found, the system prompts you to fix the validation errors before it allows you to continue to page 5 of the Activation Wizard where you can select **Activate**.

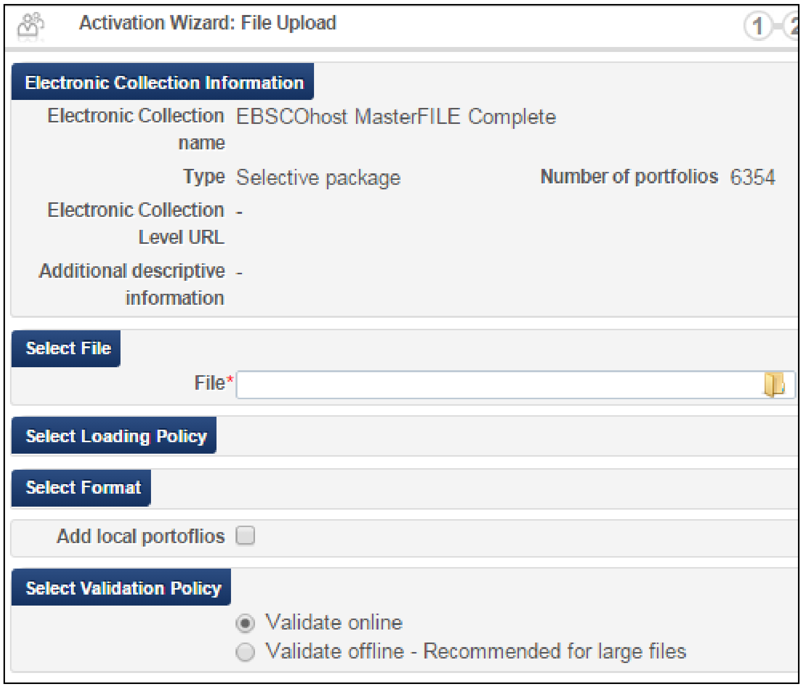


Figure 10 - Activation Wizard Page 4

6 In the **Select File** section, enter the name of the Excel file containing the records that you want to load/validate.

7 From the **Select Validation Policy** section, select **Validate offline – Recommended for large files** and click **Next**. The following **Validate offline** options appear:

- Load file if there are no errors
- Load file – ignore lines with errors
- Analysis only

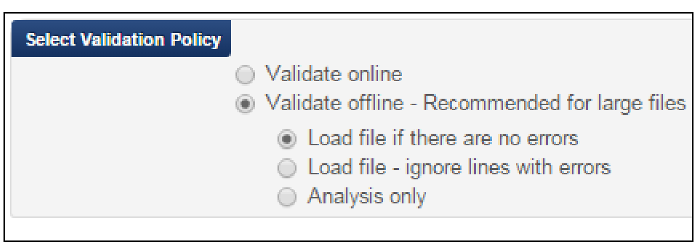


Figure 11 - Validate Offline Options

8 Select one of the **Validate offline** options, and click **Next**.

9 Review any Activation Summary and/or Information and Warnings information provided on page 5 of the Activation Wizard. When you are ready, click **Activate**.

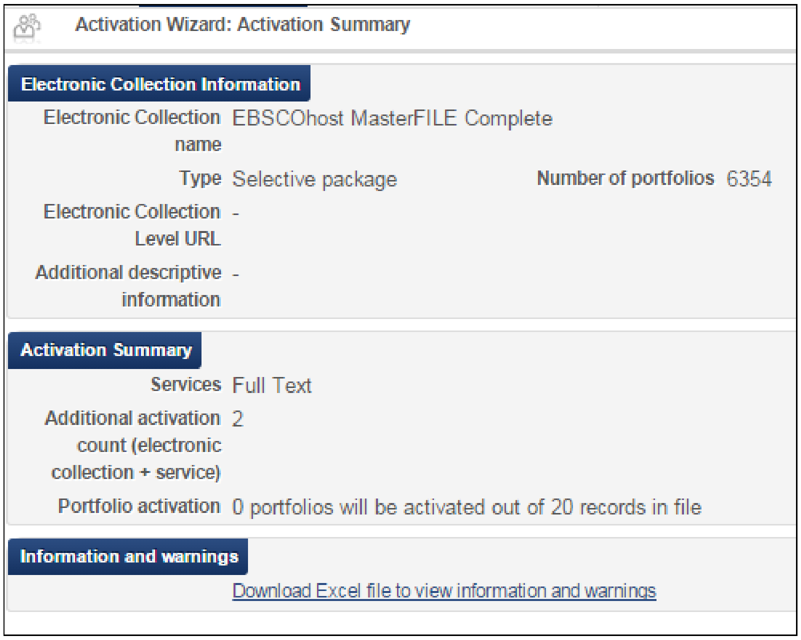


Figure 12 - Activation Summary and Information and Warnings Sections

Clicking **Activate** causes an electronic activation job to run. The results of the activation job can be viewed by selecting **Actions > Report** on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**) for the job that ran (see the example below).

Figure 13 - Electronic Activation Job Report

This report identifies the validation policy that you selected and provides a link to the file that was analyzed, that is, the file that was selected for loading in the Activation Wizard.

Managing UNIMARC Local Authority Records

Description

As a multi-format library solution, Alma supports the use of UNIMARC authority records for the purpose of authority control. With this release, Alma provides the capability for managing UNIMARC local authority records (and associating them to bibliographic records using the F3 functionality in the MD Editor). From the Metadata Configuration List page, you can now create your own UNIMARC authority profile for managing local authorities. In addition, you can create authority record import profiles designed to import UNIMARC records.

Step-by-Step Instructions

The following roles can manage local authority records:

- Cataloging Administrator
- Repository Manager
- General System Administrator

To create a UNIMARC local authority profile:

1. Click **Metadata Configuration** from the Resource Management Configuration Cataloging section (**Resource Management > Resource Management > Configuration Menu**). The Metadata Configuration List page appears.

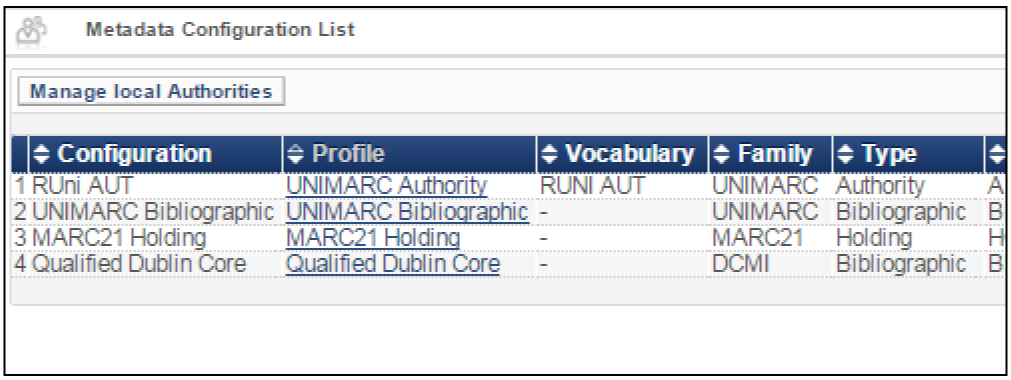


Figure 14 - Metadata Configuration List Page

2. Click **Manage Local Authorities**. The Local Authority Registry page appears.
3. Click **Add Local Authority**. The **Add Local Authority** pop-up window appears.

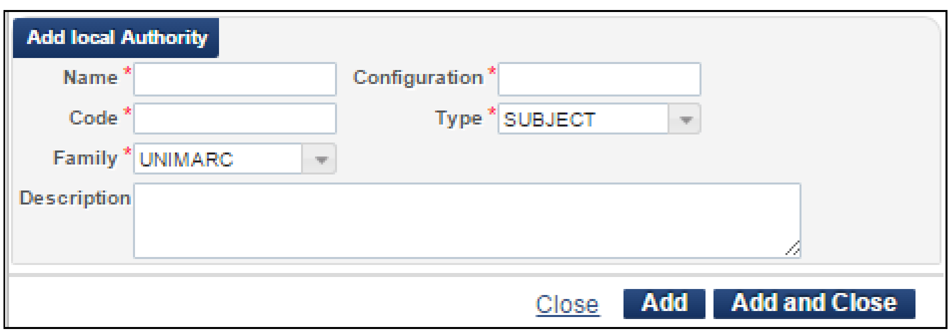


Figure 15 - Add Local Authority Metadata Configuration Profile Pop-Up Window

4. Complete the parameters required for the UNIMARC local authority profile.

- Name – Enter the vocabulary name that you want to display on the Local Authority Registry page for the profile.
- Configuration – Enter the configuration name that you want to display in the Metadata Configuration List.
- Code – Enter the vocabulary code name that you want to display when configuring your import profile, for example.

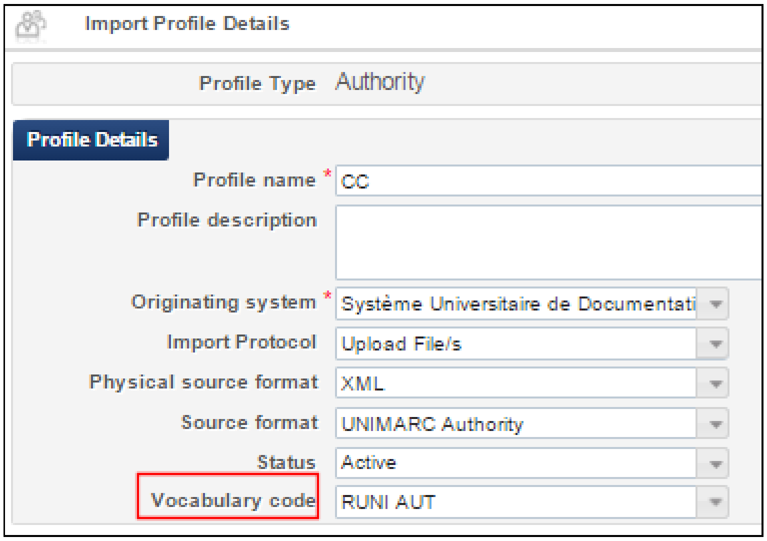


Figure 16 - Vocabulary Code Displayed in the Import Profile Options

- Type – Select one of the following types from the drop-down list:
  - Subject
  - Name
  - Names and Subjects
  - Classification
- Family – Select UNIMARC from the drop-down list.

5 Click **Add and Close**. The local authority registry that you created appears in the list on the Local Authority Registry page.

6 Click **Save**. Your local authority profile appears in the list on the Metadata Configuration List page.

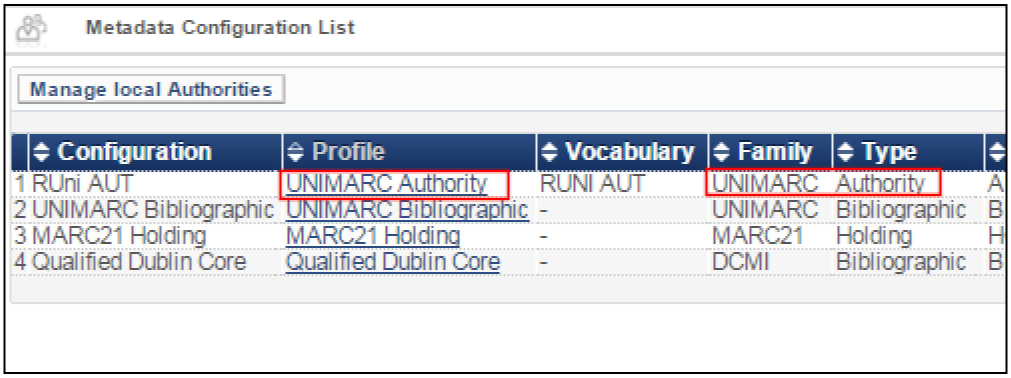


Figure 17 - UNIMARC Local Authority Profile

7 Click the **UNIMARC Authority** link to open the Profile Details page and configure fields, normalization, and validation similar to MARC 21.

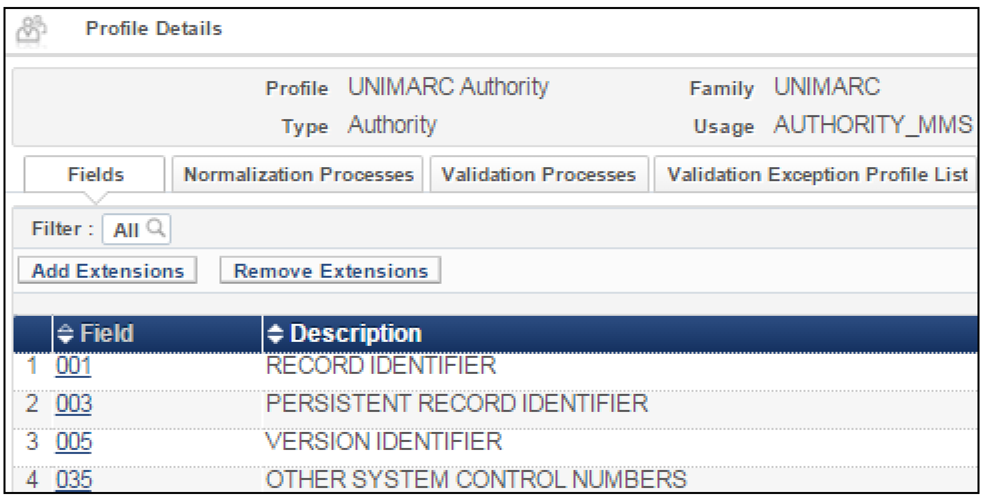


Figure 18 - Authority Profile Details

8 When you have completed making changes to the profile details, click **Deploy**.

To create a UNIMARC authority import profile:

1 Click **Import Profiles** from the Resource Management Configuration Record Import section (**Resource Management > Resource Management > Configuration Menu**). The Import Profiles page appears.

2 Click **Add New Profile**. The Import Profile Details wizard appears.

3 For the profile type, select **Authority** and click **Next**.

4 Complete the Profile Details sections in a similar manner to MARC 21 and, specifically for UNIMARC, select the following options:

- Source format = UNIMARC Authority
- Vocabulary code = Select the UNIMARC vocabulary code that you want to use from the code(s) you defined in Metadata Configuration (see the previous procedure)

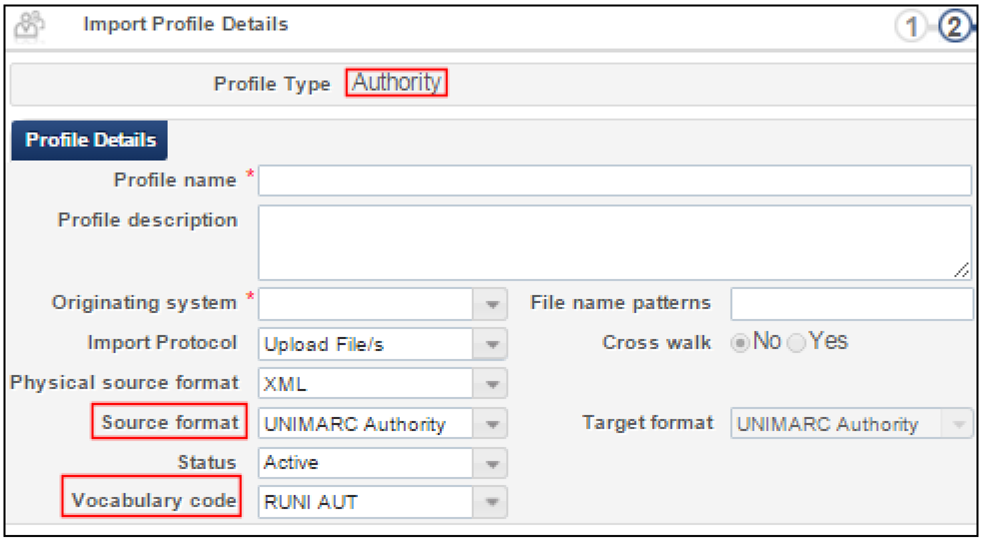


Figure 19 - UNIMARC Authority Import Profile Details

5 Click **Next**.

6 Select the UNIMARC normalization and validation profiles from the drop-down lists and click **Next**.

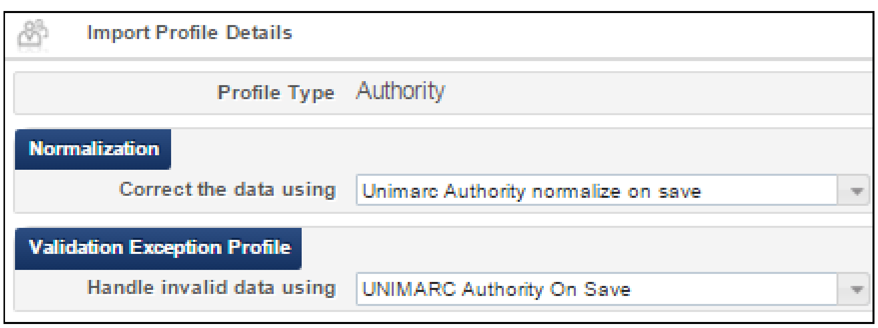


Figure 20 - UNIMARC Normalization and Validation Import Profile Selections

7 Select the match method and click **Save**. The UNIMARC authority import profile that you created displays in the list of profiles on the Import Profiles page.

New Indexes Update

In December, new indexes are being added to Alma. See the table below for a list of these changes.

Advanced Search Options	Fields/Subfields/Metadata/Other
▪ Authority Vocabulary ▪ Authority ID	$0 (identifier) $2 when the second indicator is 7 In the following fields: 100, 110, 111, 130, 600, 610, 611, 630, 700, 710, 711, 730, 800, 810, 811, 830, 648, 650, 654, 651, 655, 751, 754, 245, 440, 490, 382, 050, 060, 070, 090, 091, 092, 093, 094, 095, 096, 097, 098, 099, 052, 055, 080, 082, 083, 084, 085, 086
▪ Contributed By (for electronic collections and electronic portfolios)	Use in the Community Zone tab for locating electronic resources that were contributed.
▪ Is Local (for local electronic collections and local portfolios)	Yes/No. Use to locate locally managed electronic resources.
▪ Has Local Coverage Information	From date override or embargo. Use to locate electronic resources that have local coverage.
▪ Coverage In Use	Only Local / Global AND Local / Global OR Local / Only Global. Use to locate electronic resources based on the type of coverage used.
▪ Activation Date (electronic collections, portfolios)	Use in order to locate electronic resources based on the date on which they were activated.
▪ Collection Access Type	Current/Perpetual.
▪ Date Information Override	Yes/No.

Advanced Search Options	Fields/Subfields/Metadata/Other
▪ Coverage in Use (with a list of drop-down values from which to select)	Specify coverage type: ▪ ONLY global ▪ ONLY local ▪ global AND local ▪ global OR local
▪ Content Related Data	580 $a, 773 $t
▪ Modification Date	MMS record's modification date column
▪ Binding Note	563 $a

Nonfiling Marker << >>

Alma is now able to work with the cataloging convention of angle brackets, << >>, which are used in different regions to indicate nonfiling markers. The nonfiling markers are used for sorting and browsing. The nonfiling indicators are processed in the following manner:

- Display – When there is text within the angle brackets, the brackets are removed when the text appears.
- Sort/browse – For sorting or browse purposes, the text within the angle brackets is ignored.
- MD Editor – In the MD Editor, the angle brackets and the text within the brackets appear in the area where cataloging records are entered. However, where text such as a title appears in the MD Editor, the angle brackets are removed (see the example below).

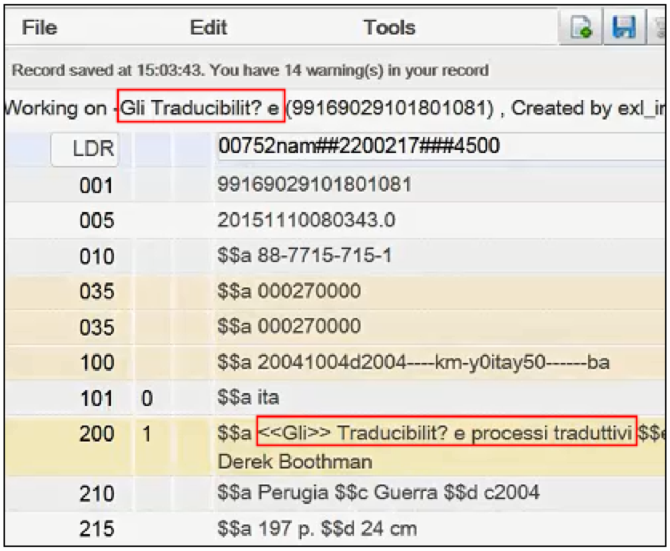


Figure 21 - Handling of Nonfiling Indicators in the MD Editor (Cataloging and Display)

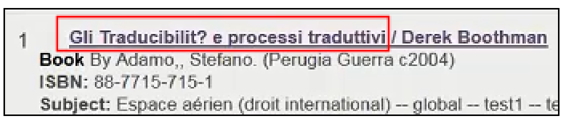


Figure 22 - Handling of Nonfiling Indicators in Search Results

Enhanced Collection Editing, Navigation, and Management

Description

Several enhancements were implemented to improve the Collection Resource Editor user experience by adjusting the UI to better support various collection management workflows. The enhancements include the following:

- The **Top-Level Collections** link from the main menu (**Resource Management > Search and Sets**) was renamed **Manage Collections**.
- Clicking **Manage Collections** opens the Collection Resource Editor, which displays a list of all top-level collections, instead of opening the Repository Search results. You may also edit a collection directly by retrieving it using the staff search and clicking **Edit Collection**.

- All collection information in the **Summary** tab is now constantly visible in the Collection Resource Editor.
- Breadcrumbs appear in the Collection Resource Editor that indicate the path to the collection on which you are working.
- **Move Selected** and **Delete Selected** buttons were added to allow you to move selected sub-collections to another collection and to delete selected collections in bulk.
- **Move Selected** and **Remove Selected** buttons were added to allow you to move selected titles to another collection and remove selected titles from a collection (without deleting them).

For more information concerning managing collections, see the **Managing Collections** section of the *Alma Resource Management Guide*.

Step-By-Step Instructions

The following roles can edit, navigate, and manage collections:

- Collection Inventory Operator Extended – Create and edit top level collections, delete top level and sub-collections, and elevate a sub-collection to a top-level collection
- Collection Inventory Operator / Extended Digital inventory operator - Create and edit any sub-collection and move sub-collections between parent collections
- Digital inventory operators - Add/remove titles to/from a collection and move a title between collections

To edit, navigate, and manage collections:

1 From the Alma main menu, select **Resource Management > Manage Collections**. The Collection Resource Editor appears, displaying a list of top-level collections.

Figure 23 –Collection Resource Editor – Top Level Collections

2 Select **Actions > Edit**. A list of sub-collections for the collection appears.

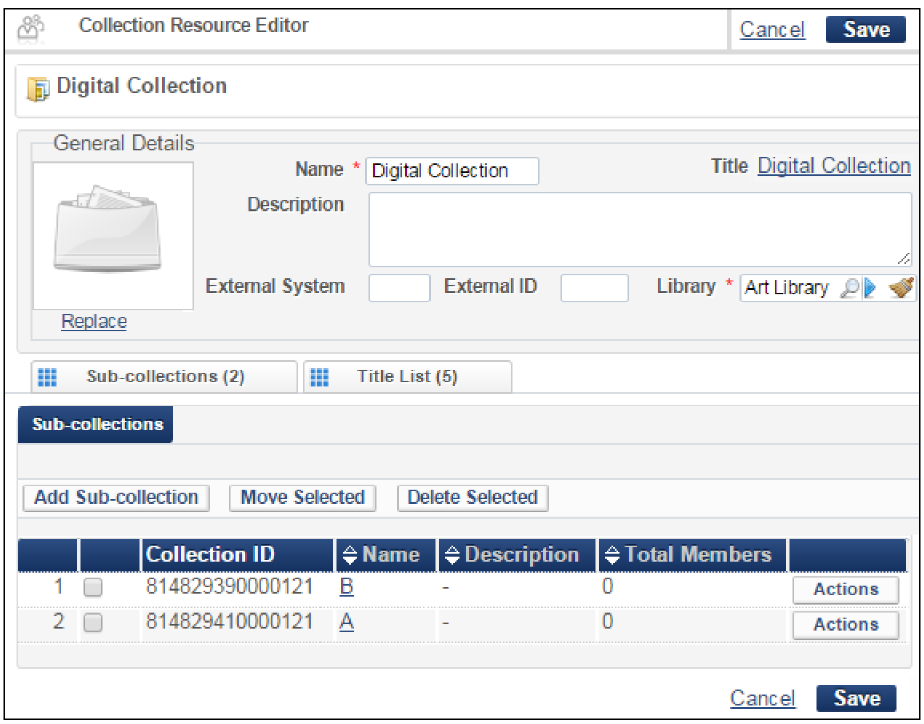


Figure 24 –Collection Resource Editor – Sub-collections

3 To change the name of the top-level collection, enter a new name in the **Name** field.

4 To change the library of the top-level collection and all of its sub-collections, select a new library from the **Library** field.

5 To add or replace the thumbnail for the collection, click **Replace** and either select **Use default thumbnail** or select a new thumbnail image.

Note: The following image formats are supported: png, gif, and jpg.

6 To move a sub-collection to another parent collection or delete a sub-collection, select the sub-collection check box and click **Move Selected** or **Delete Selected**.

Note: Only empty collections can be deleted.

7 To make a sub-collection a top-level collection, select **Action > Make Top-level**.

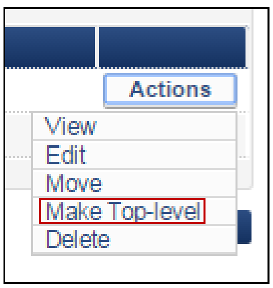


Figure 25 –Make Top-Level

Note: Only the Collection Inventory Operator Extended role can perform this action.

8 Click the **Title List** tab to see a list of the titles in the collection.

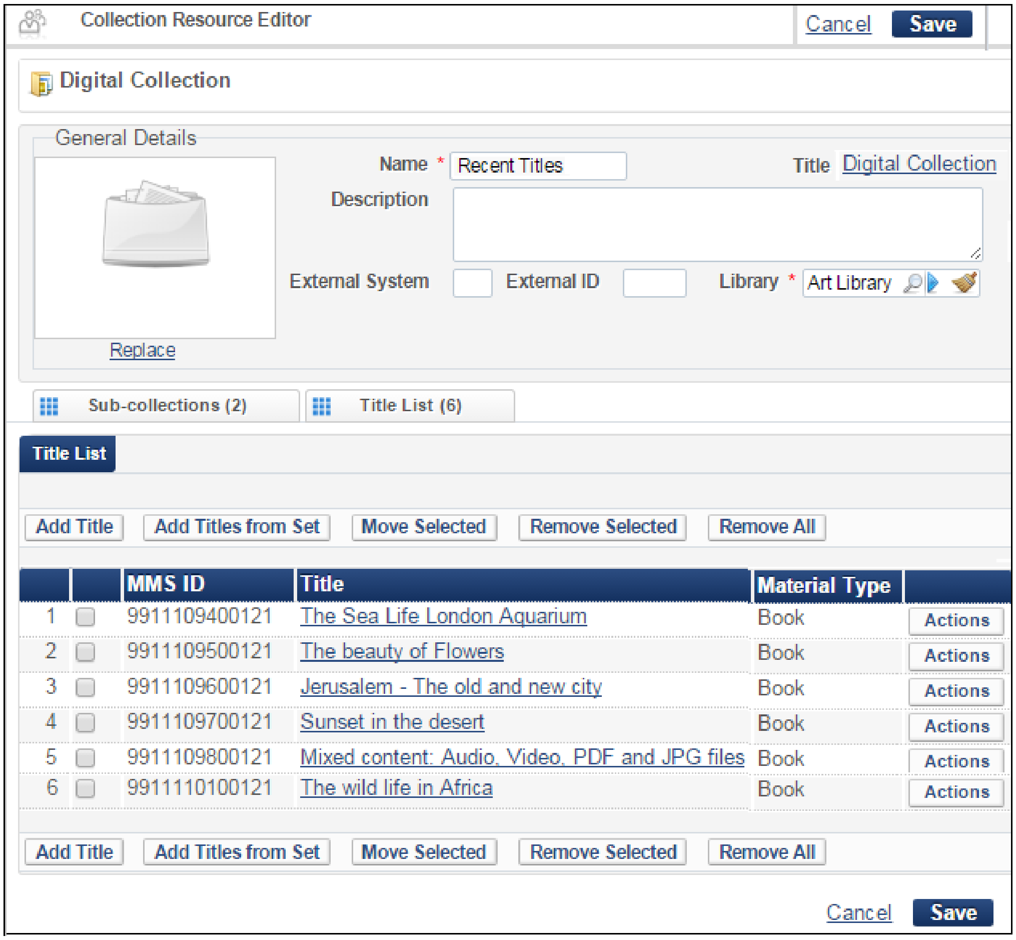


Figure 26 –Title List

9 To move a title to another collection or remove a title from the collection (without deleting it), select the title check box and click **Move Selected** or **Remove Selected**. To remove all of the titles in the list, click **Remove All**.

Note: A title can be removed from a collection only if it does not contain digital inventory, or if it does contain digital inventory and is assigned to more than one collection. This is to ensure that all digital inventory is managed in collections.

Enhanced Staff Search Collection Assignment Handling

Description

The following enhancements were implemented for the staff search collection assignment handling:

- Collections to which a title is assigned now appear in the repository search results.
- You can now add an item to a collection by clicking the **Add to collection** link from the repository search results.

Step-By-Step Instructions

The following roles can access this feature:

- Collection Inventory Operator
- Digital Inventory Operator

To access this feature:

1. Perform a search in the repository. The collections to which an item belongs appear in the results. If the item belongs to more than three collections, the number of additional collections appears with the word **more**.

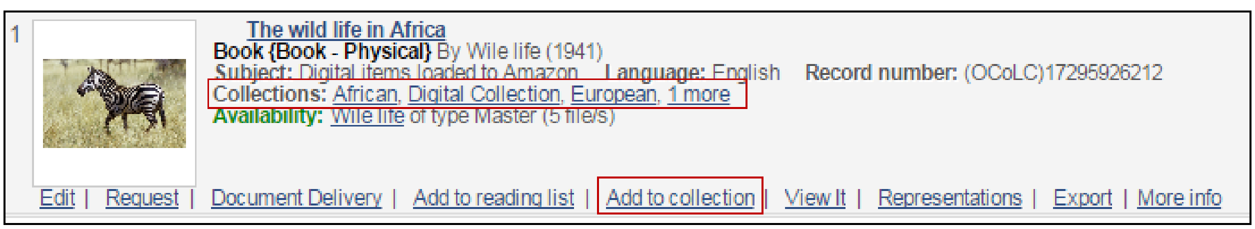


Figure 27 –Collections

2. Click a collection to open the Collections Resource Editor.
3. Click **1 more** (in this example) to see the additional collections.
4. Click **Add to collection** to open a list of collections:

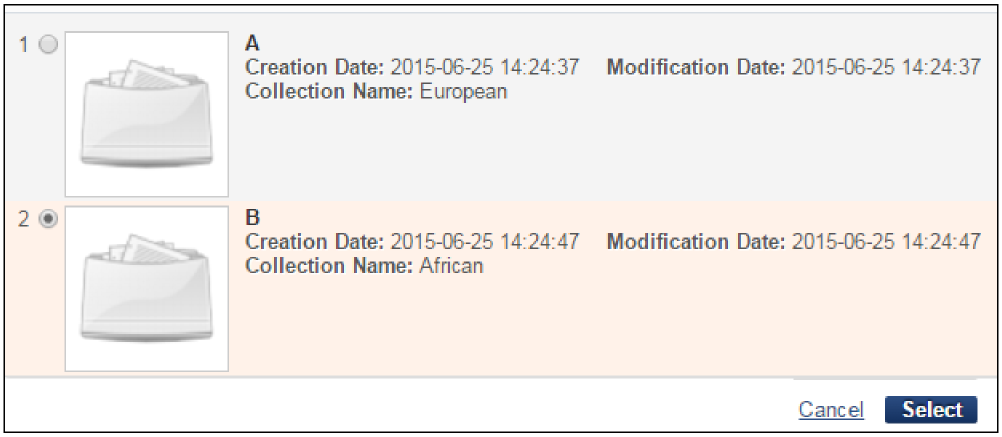


Figure 28 – List of Collections

5 Select a collection and click **Select**.

The item is added to the collection.

Other Resource Management Enhancements

- The tabs on the Manage Sets page and the Manage Exports page now have the blue (or gray) "has contents" icons in the tabs, indicating that the tabs have (or don't have) modified contents.

Figure 29 - Manage Sets Page

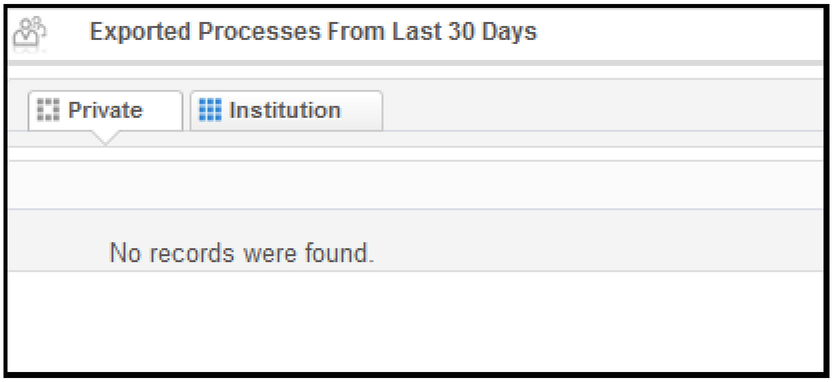


Figure 30 - Manage Exports Page

- The tabs on the Physical Item Editor page now have the blue (or gray) “has contents” icons in the **Notes** and **History** tabs, indicating that the tabs have (or don’t have) modified contents.

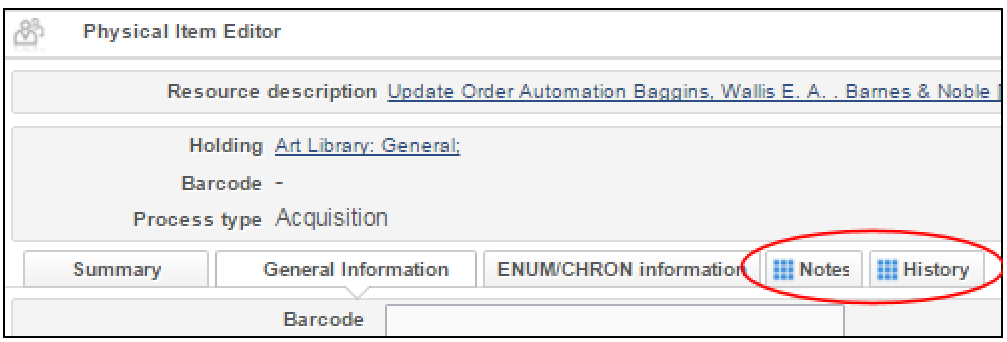


Figure 31 - Notes and History Tabs with Has Content Indicator

- When a record is locked in the MD Editor, the locked message now includes the name of the user (and not an internal user number). Click the user name to see a pop-up with user information (this is the same pop-up that appears when clicking the user information icon in various locations in Alma).
- Subfields a, b, c, n, p, and h in field 245 now appear in the related titles section on the View It tab in Primo.
- When working with the resource type field, for projected medium (both physical and electronic), 008 pos 33 now also allows **i** (for image).
- The vocabulary now appears as a field in the header when viewing an authority record in the MARC Record Simple View page.

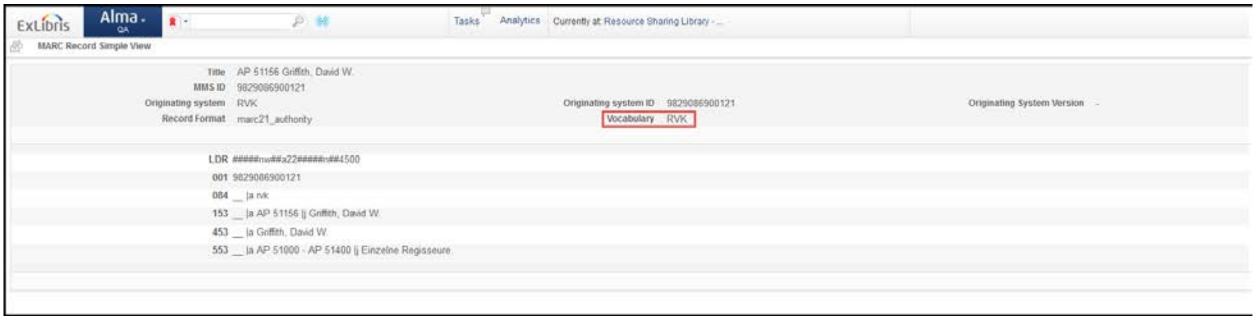


Figure 32 - MARC Record Simple View Page

- Repeatable notes are now supported for digital representations. This feature is available when editing representations in the new **Notes** tab (search for a digital title, click the **Representations** link, and select **Actions > Edit**):

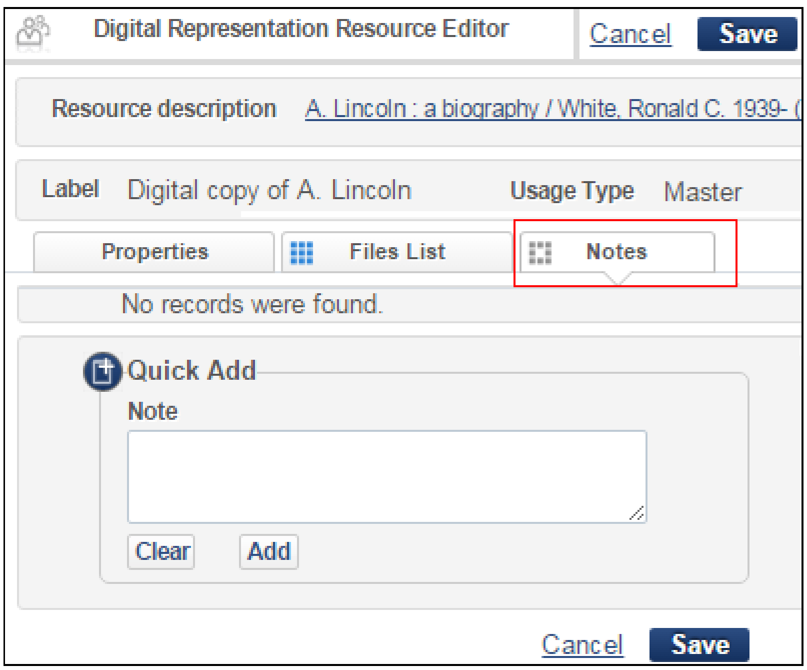


Figure 33 – Notes Tab

Fulfillment

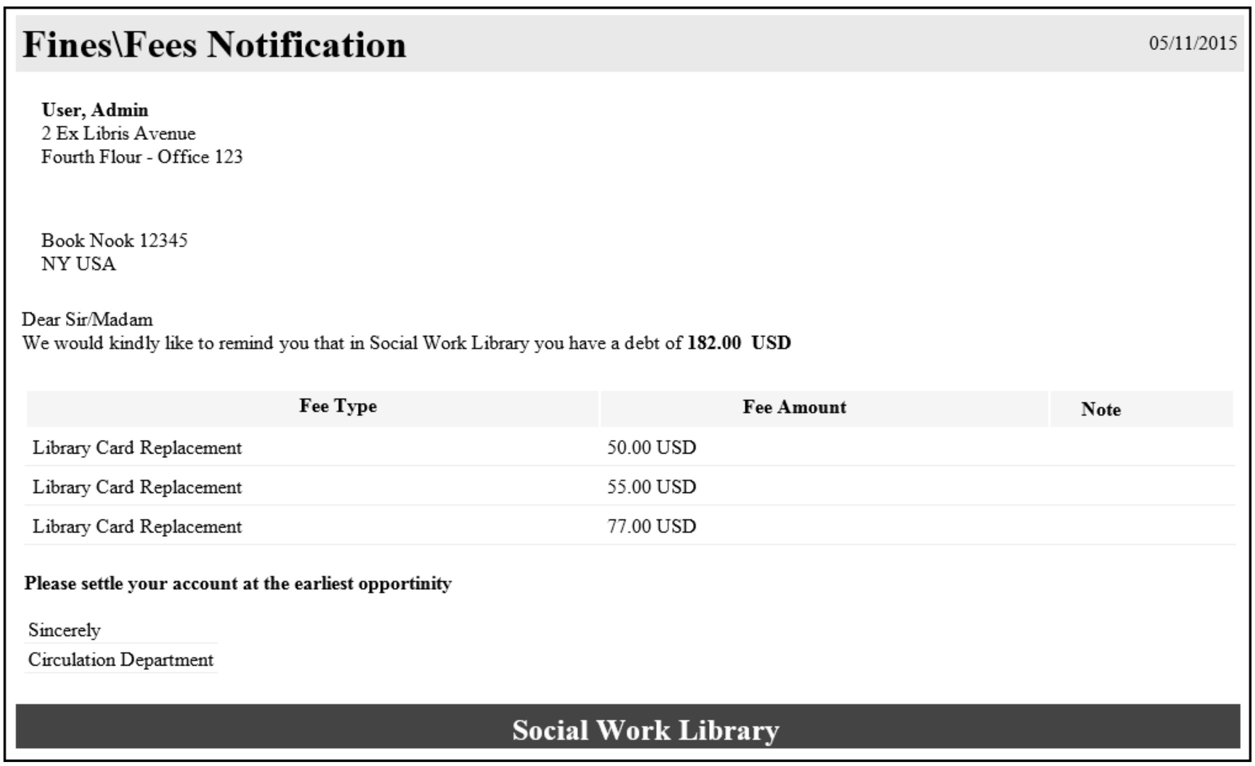
The following sections describe new or changed Fulfillment features in this release of Alma.

Patron Notifications for Fines and Fees

Description

This enhancement allows libraries to setup a series of email and/or SMS notifications to patrons on fines/fees owed, thereby providing improved services in case of delinquent payments by patrons.

You can define the notification frequency according to the amount owed, fine/fee owner, and/or user group. Notifications may also be printed. A sample email is shown below.



Fines\Fees Notification 05/11/2015

User, Admin
2 Ex Libris Avenue
Fourth Flour - Office 123

Book Nook 12345
NY USA

Dear Sir/Madam
We would kindly like to remind you that in Social Work Library you have a debt of **182.00 USD**

Fee Type	Fee Amount	Note
Library Card Replacement	50.00 USD	
Library Card Replacement	55.00 USD	
Library Card Replacement	77.00 USD	

Please settle your account at the earliest opportinity

Sincerely
Circulation Department

Social Work Library

Figure 34 – Patron Email Notification of Fines and Fees

Step-by-Step Instructions

The following roles can modify fines/fees notification profiles:

- User Administrator
- General System Administrator

The following roles can configure fulfillment jobs:

- General System Administrator
- Fulfillment Administrator

To configure notification profiles:

1 Access the Fines/Fees Notification Profiles List page (**Administration > User Management Configuration > Configuration Menu > Patron Charges > Fines/Fees Notification Profiles**).

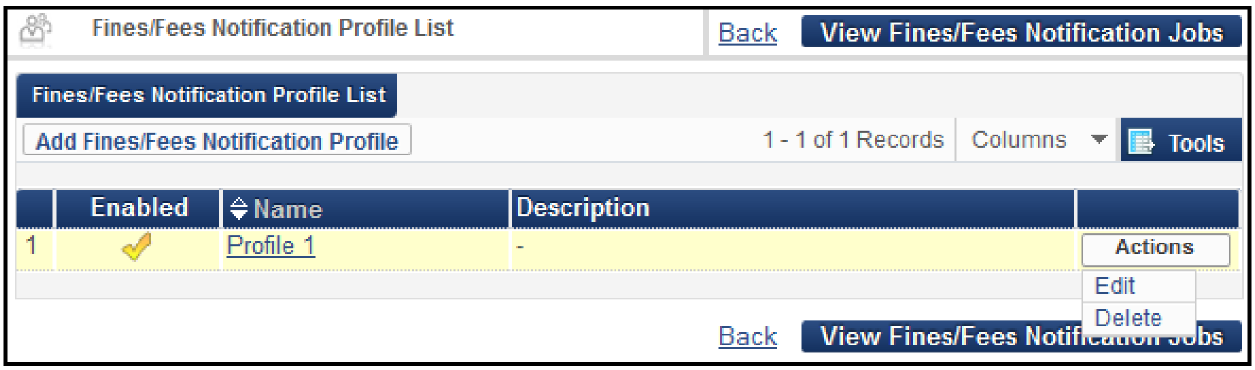


Figure 35 – Fines/Fees Notification Profiles List

2 Click **Add Fines/Fees Notification Profile** to add a new profile or select **Actions > Edit** for an existing profile to edit a profile.

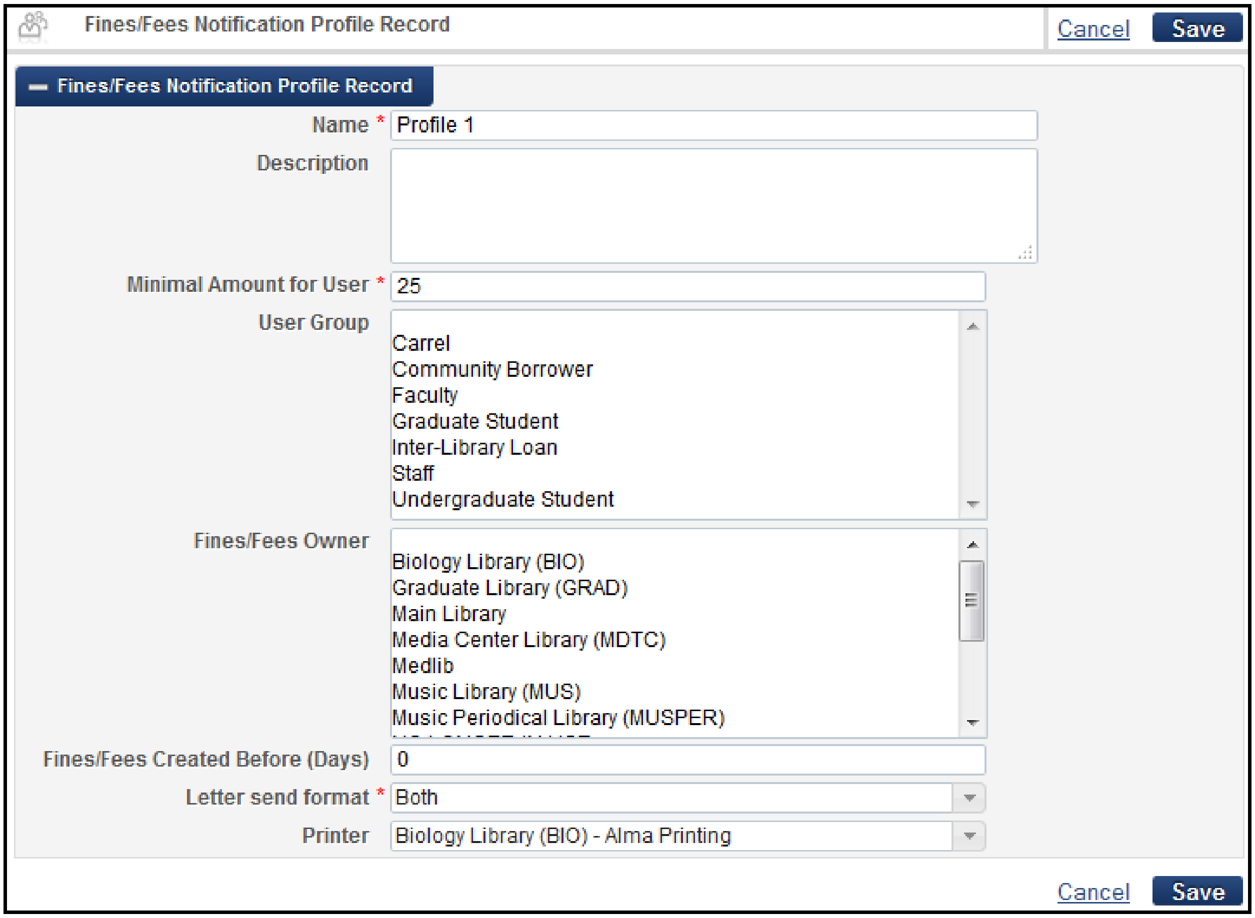


Figure 36 – Fines/Fees Notification Profile

3 Fill in the relevant fields. The fields are:

- **Minimal amount for user** (mandatory) – The minimum fine to invoke the letter. Numbers only, decimals may be used.
- **User group** – The user group that is checked for fines. Leave blank to select all user groups.
- **Fines/fees owner** – The institution/library that is checked for fines. Leave blank to select all libraries. Selecting a library configures the notification to be sent only if the minimal amount threshold is owed to the selected library. Selecting multiple configures the notification to be sent if the threshold is owed to one of the selected libraries.
- **Fines/fees created before** (days) –This enables setting the profile to send the notice only if the fine is owed for more than a specified period of time.

- **Letter send format** – Whether to send email, print a letter, or both.
- **Printer** – The printer to which to print the letter.

4 Click **Save**.

To configure the Fines/Fees Notifications job:

1 Access the Fulfillment Jobs Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**).

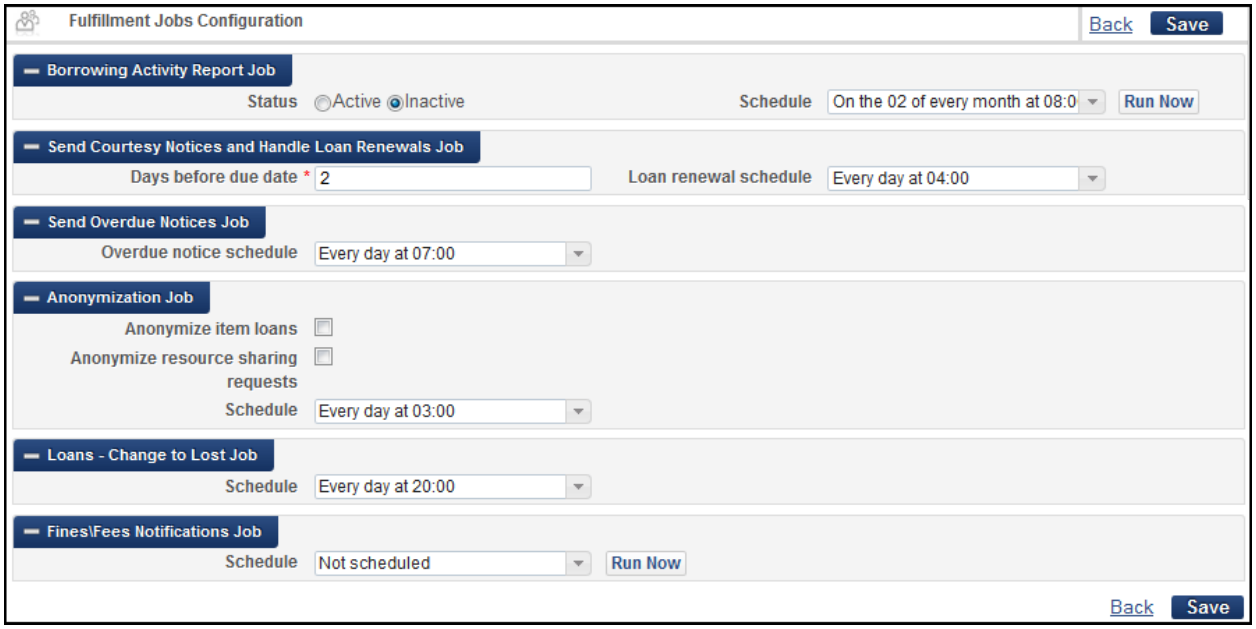


Figure 37 – Fines/Fees Notifications Jobs Configuration Page

2 Click **Run Now** next to the **Fines/Fees Notification Job** or select a schedule to run the report. Click **Save**.

3 View the report on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

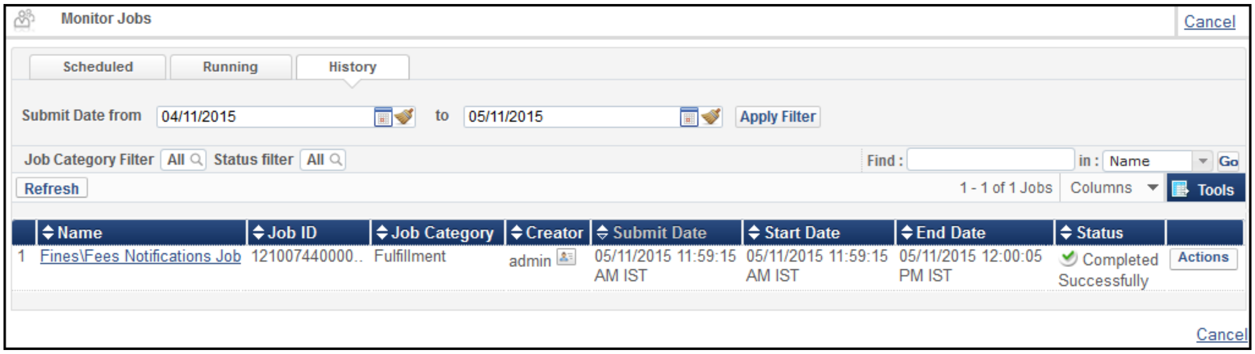


Figure 38 – Fines/fees Report Link

Course Loader Integration Profile

Description

You can now import course information from your course management system. Alma supports this using the Course Loader integration profile that runs on the schedule you configure. You can also manually run the profile after it is configured, and you can edit or delete the profile.

The course information must be in a tab-separated value file on an FTP server accessible by Alma. The file must contain a list of courses, one on each line, with the following columns, in the following order: **Code**, **Title**, **Section ID** (course section ID), **Academic Department**, **Processing Department**, **Term1**, **Term2**, **Term3**, **Term4**, **Start Date**, **End Date**, **Number of Participants**, **Weekly Hours**, **Year**, **Searchable ID 1** (course ID 1), **Searchable ID 2**, **Searchable ID 3**, **Instructor 1**, **Instructor 2**, **Instructor 3**, **Instructor 4**, **Instructor 5**, **Instructor 6**, **Instructor 7**, **Instructor 8**, **Instructor 9**, **Instructor 10**.

- A header row, if any, is ignored.
- Key fields (which are mandatory) are **Code** and **Section ID**. All other fields are optional.
- Field format and values:
  - **Start Date** and **End Date** must be strings in the format **dd-MM-YYYY**.
  - **Number of Participants**, **Weekly Hours**, and **Year** are integer fields.
  - All other fields are strings.
  - If using the LTI integration profile, the **Code** field must match the course identifier imported using the LTI integration profile.

    - Any values in **Academic Department** or **Processing Department** that do not match existing values in Alma are ignored.
    - Term fields must be one of: **EARLY_AUTUMN**; **AUTUMN**; **WINTER**; **SPRING**; **SUMMER**; **SEMESTER1**; **SEMSETER2**; or **YEARLY**. Any other values are ignored.
    - Any values in the **Instructor** fields that do not match existing users in Alma are ignored.
- You can edit a course in a subsequent file by including a line with the same **Code** and **Section ID**.
    - Only the **Number of Participants** and **Instructor** fields are changed (changes in other fields are ignored).
    - Changing the number of participants is informational only; it does not change the status of any citations attached to reading lists associated with the course.
- Currently, you cannot delete courses using this feature (they can still be deleted manually in Alma).

Step-by-Step Instructions

The following roles can configure a course loading integration profile:

- Fulfillment Administrator
- General System Administrator

To configure a course loading integration profile:

1. Create an S/FTP connection for the integration profile. For more information, see **Configuring S/FTP Connections** in the *Alma Administration Guide* or *Alma Online Help*.
2. On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), click **Add Integration Profile**. The External System page appears.

Figure 39 - External System Page

3 In the **Integration type** field, select **Course Loader** from the drop-down list. The page refreshes with different fields.

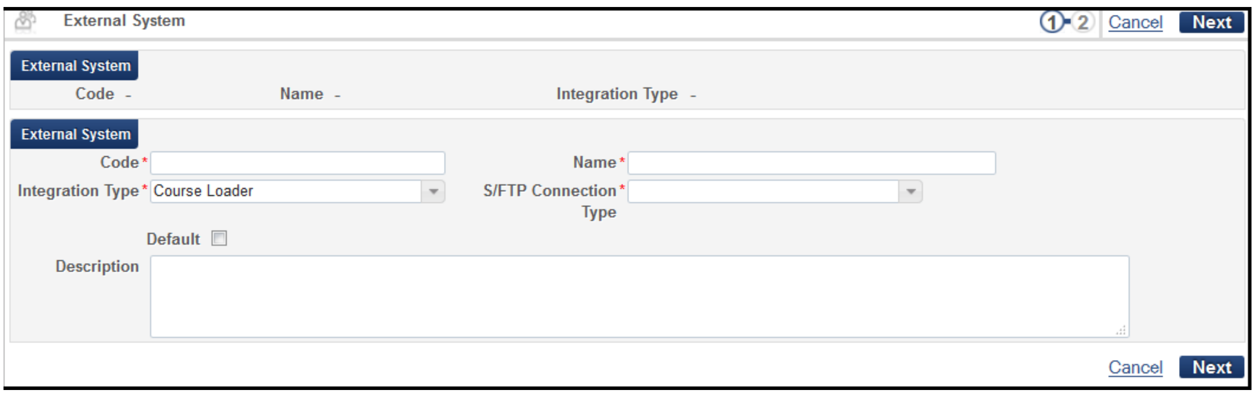


Figure 40 -Course Loader Integration Profile, Page 1 of the Wizard

4 Enter a **Code** and **Name** for the profile.

5 Select the **S/FTP connection** for the profile. You can also enter an optional **Description**. Note that the **Default** field is reserved for future use.

6 Click **Next**. The second page of the wizard appears.

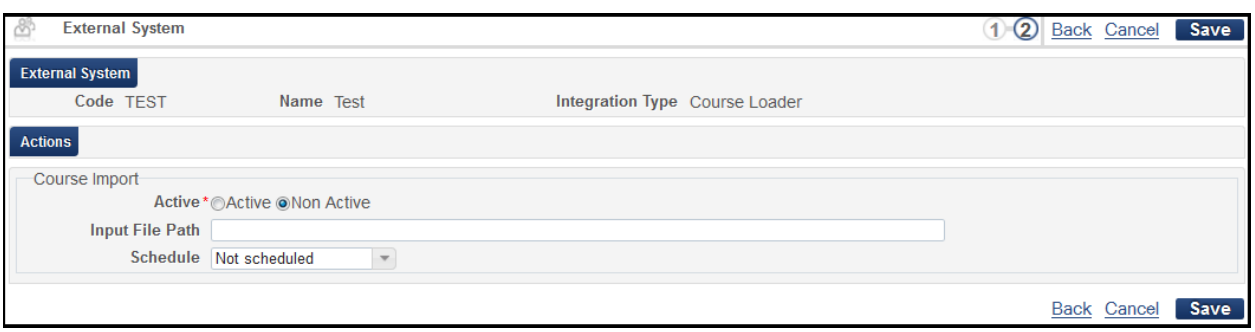


Figure 41 - Course Loader Integration Profile, Page 2 of the Wizard

7. Select whether the profile is **Active** or **Inactive**.
8. If the course file information is located in a subdirectory at the FTP connection, enter the subdirectory in **Input File Path**. Otherwise, enter `/`.
9. In the **Schedule** field, select if and when you want the profile to run.
10. Click **Save** to save the profile.

You can see the job on the list of scheduled jobs. See **Viewing Scheduled Jobs** in the *Alma Administration Guide* or *Alma Online Help*. After the profile runs, the course information from the Excel file appears in Alma.

To manually run a course loading profile:

1. On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), select **Actions > Edit** in the row containing the course loader integration profile. The profile appears with the General Information tab pre-selected.

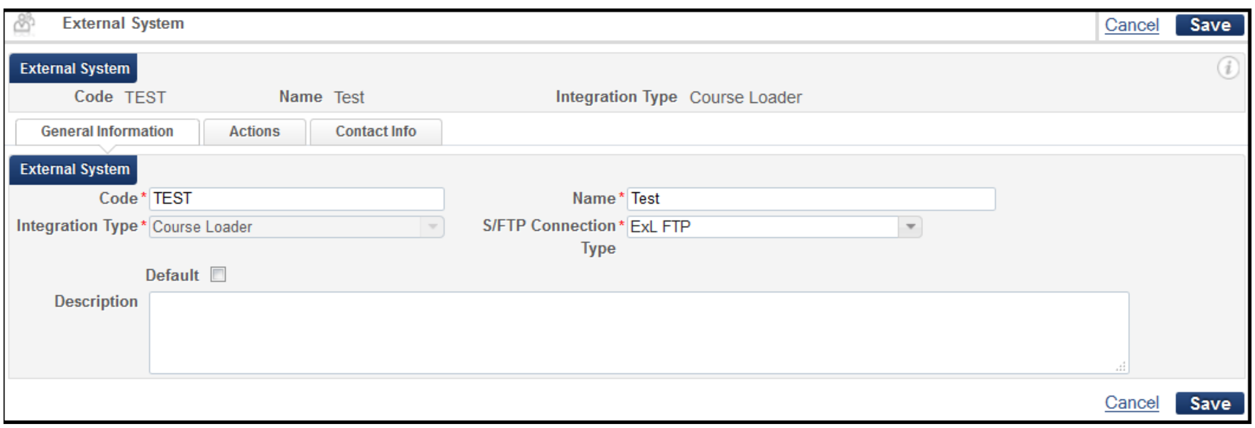


Figure 42 - Course Loader Integration Profile, General Information Tab

Note: The **Contact Info** tab is for future use.

2. Select the **Actions** Tab. The **Actions** tab appears.

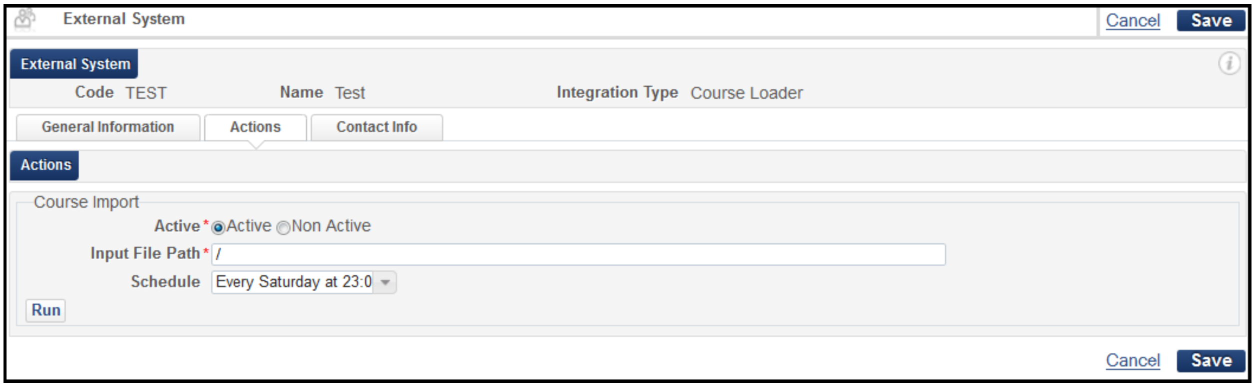


Figure 43 - Course Loader Integration Profile, Actions Tab

3 Click **Run** to run the profile. The job number appears on the page.

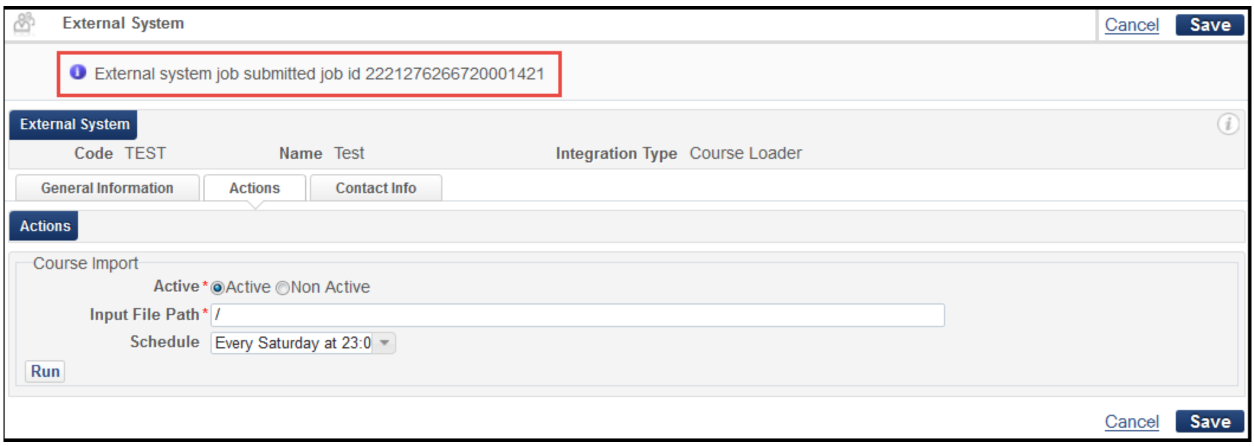


Figure 44 - Course Loader Integration Profile, Actions Tab (with Submitted Job)

You can monitor the job on the Monitor Jobs page. See **Viewing Running Jobs** and **Viewing Completed Jobs** in the *Alma Administration Guide* or *Alma Online Help*.

To edit a course loading profile:

1 On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), select **Actions > Edit** in the row containing the course loader integration profile.

2 Enter any changes (see above) and click **Save**. The profile is modified.

To delete a course loading profile:

On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), select **Actions > Delete** in the row containing the course loader integration profile, and then click **Confirm** in the confirmation dialog box. The profile is deleted.

Other Fulfillment Enhancements

- The **should_automatically_print_request_slip** customer parameter was added to the Fulfillment Customer Parameters mapping table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) with a default value of **true**. If you set this parameter to **false**, request slips are not printed automatically. You can still print request slips manually (by clicking **Print Slip**).
- A section about available items was added to the Ful Resource Request Slip letter. The section includes all available items for the request. For example:

```
<available_items>
 <available_item>
  <barcode>89984</barcode>
  <call_number>PS3552.U813V36 1986</call_number>
  <item_policy></item_policy>
  <library_code>MAIN</library_code>
  <library_name>Main Library</library_name>
  <location_code>offsite</location_code>
  <location_name>Building 9</location_name>
  <material_type>BOOK</material_type>
  <public_note></public_note>
  <shelving_location></shelving_location>
 </available_item>
</available_items>
```

  You can add this information to the printed slip by configuring the corresponding XSL file.
- The **enable_moving_item_to_hold_shelf_from_self_check** customer parameter was added to the Fulfillment Customer Parameters mapping table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**). If its value is **false** (which is the default value), a requested item that is checked in using a self-check machine is not placed on the hold shelf and the hold shelf letter is not sent. If this parameter is set to **true**, the item is placed on the hold shelf and a hold shelf letter is sent.

Note that the system determines whether the item should be placed on the hold shelf or enter hold shelf processing based on the definition of the **Has hold shelf processing** parameter at the circulation desk. It is also relevant only for self-check circulation desks with hold shelves. If there is no hold shelf at the circulation desk, the item enters the transit process.

- An additional scheduling option was added to the **Overdue Notice Schedule** field for configuring the Notifications – Send Due Date Reminders job on the Fulfillment Jobs Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**). Note that the time displayed in the additional option differs depending on your institution's time zone.

Resource Sharing

The following sections describe new or changed Resource Sharing features in this release of Alma.

Support for CCC GetItNow Service in Resource Sharing

Description

This enhancement allows libraries to use the CCC GetItNow service in a mediated manner, in cases where they do not want to have this as an open service to all patrons. It integrates seamlessly into the resource sharing workflow as detailed below.

To utilize the CCC GetItNow service:

1. Activate the relevant CCC GetItNow electronic collection that is managed in the Community Zone.
2. Create a new resource sharing partner for the CCC GetItNow Service.
3. Create a resource sharing borrowing request with the CCC GetItNow service selected as the partner. From the electronic portfolio, access the CCC GetItNow link in a browser and submit the article request.
4. Once CCC GetItNow sends the article's access link, copy the link into the externally obtained dialog box to send an email to the patron with the link to the article.

To suppress the service from the View It tab, you can activate the collection without externalizing its availability. This way, the service is available to the resource sharing staff but not to the patrons that search in Primo. This is done by clearing the **Make service available** option when activating the collection. For example:

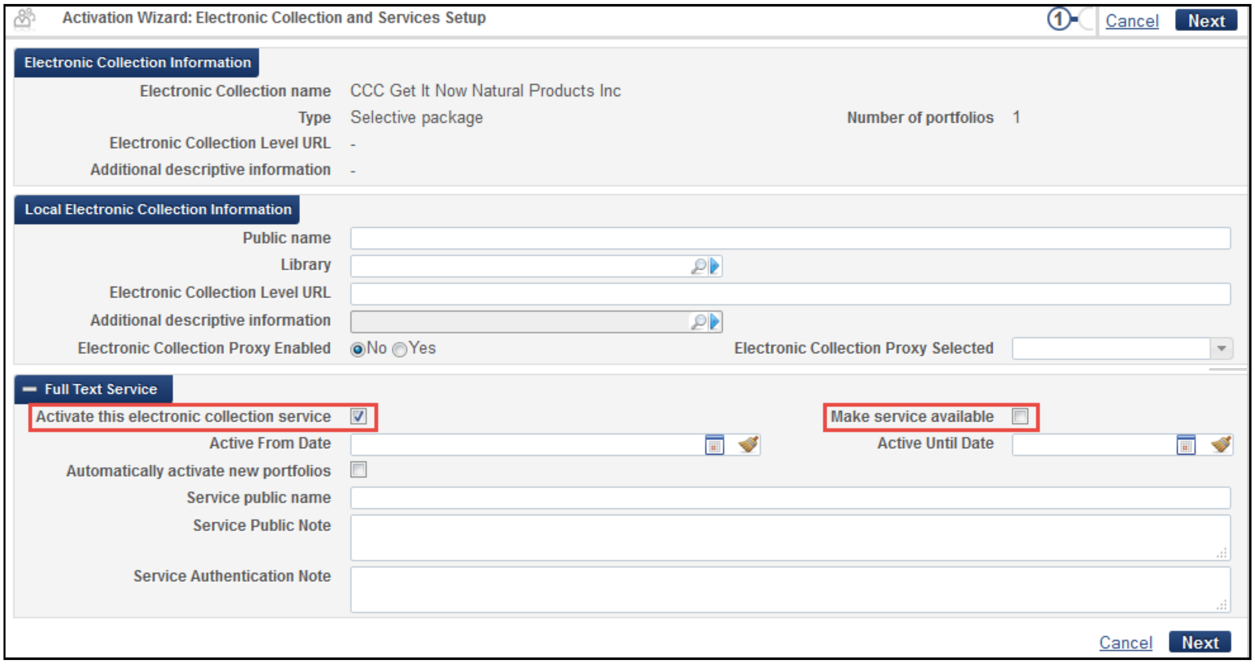


Figure 45 - Activate Electronic Collection

Step-by-Step Instructions

The following roles can configure a CCC GetItNow partner:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

The following roles can manage CCC GetItNow borrowing requests:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure placing a request via CCC GetItNow:

1. Add a partner record for the CCC GetItNow service. Access the Partners page (**Fulfillment > Resource Sharing > Partners**).
2. Click **Add Partner.**
3. Enter a code and name for the partner. Select a profile type of **External System** and system type of **CCC GetItNow**.

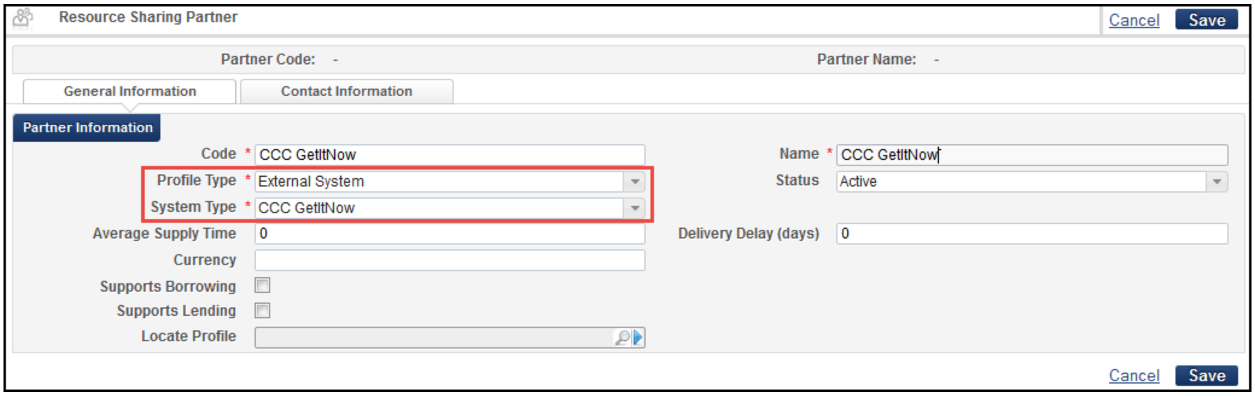


Figure 46 - Create a CCC GetItNow Partner

To place a request using the GetItNow service:

1 Create a borrowing request.

Note: There are six required fields for the GetItNow service: Article/Chapter Title, Journal Title, Volume, Issue, Start Page, and Publication Date.

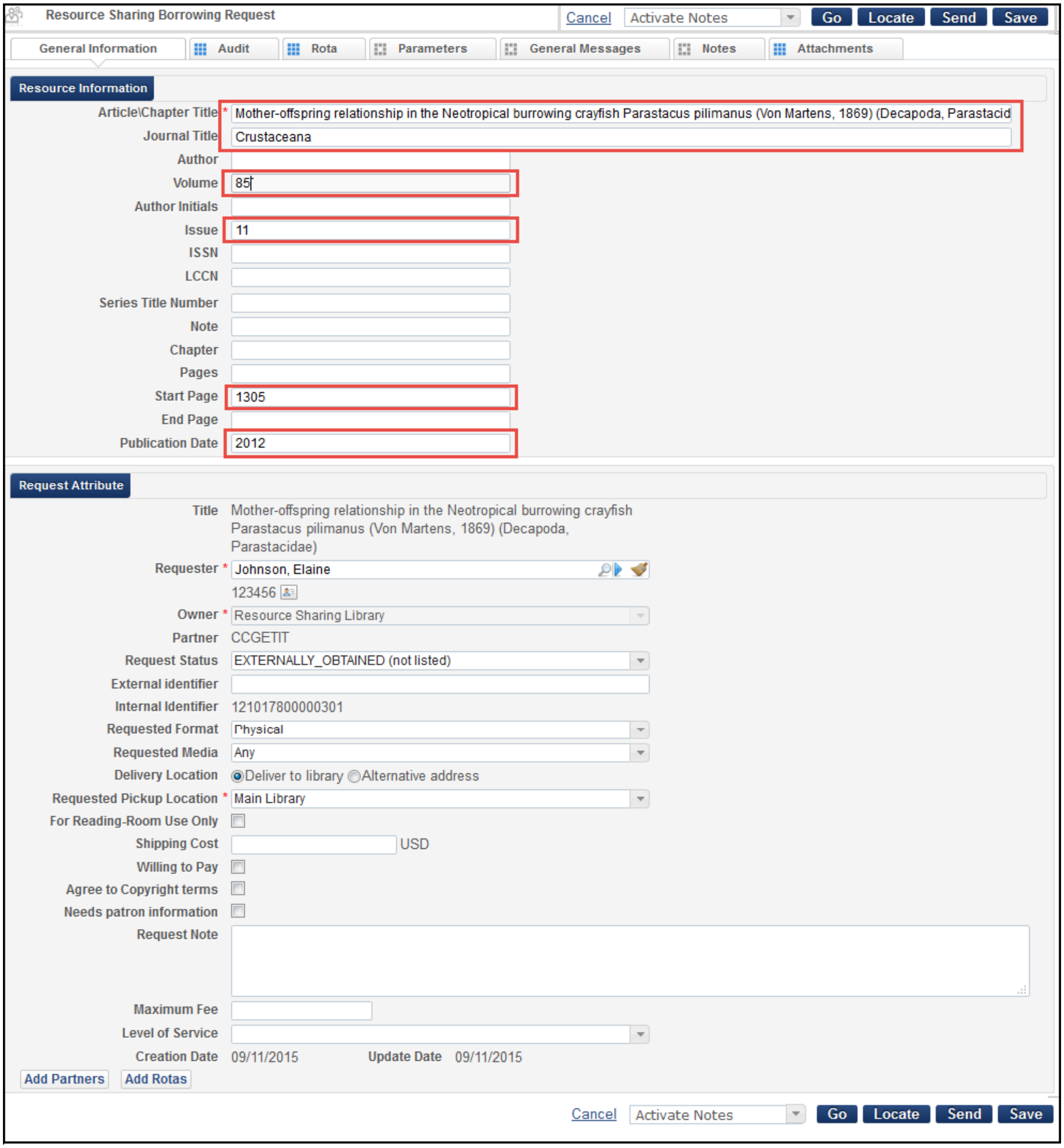


Figure 47 – Borrowing Request with Required Fields for CCC GetItNow Request

If configured that way, Alma automatically selects CCC GetItNow as a partner. Otherwise, click **Add partners** and select a partner with a profile type **External System**.

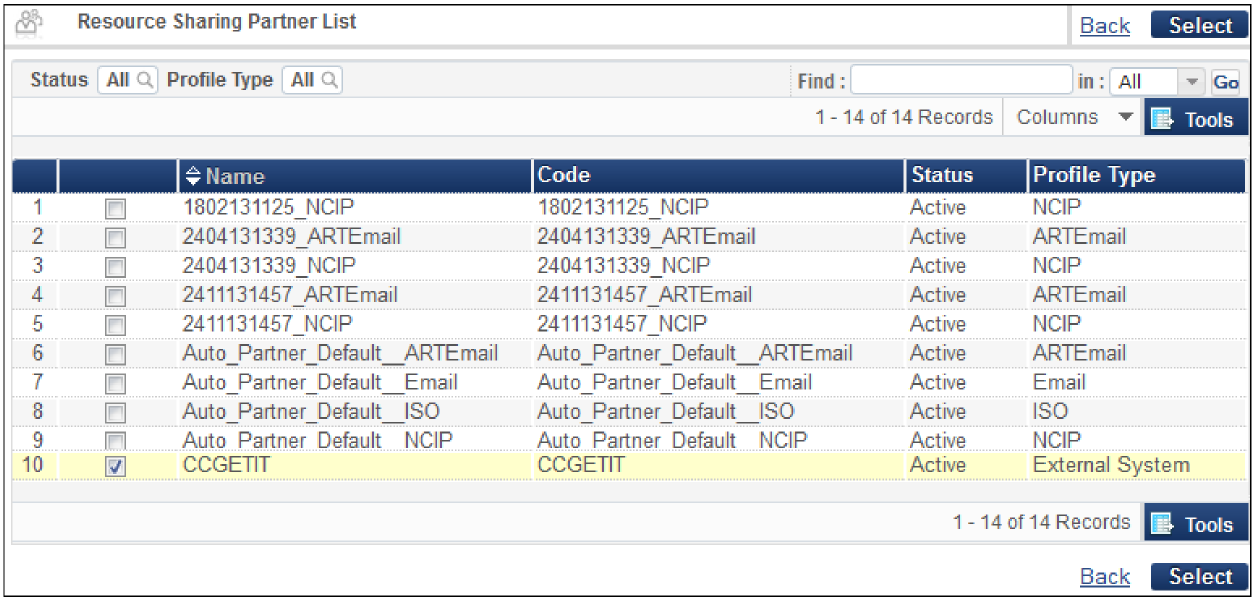


Figure 48 – Partner List

2 Click **Send** for the request. The electronic portfolio page appears.

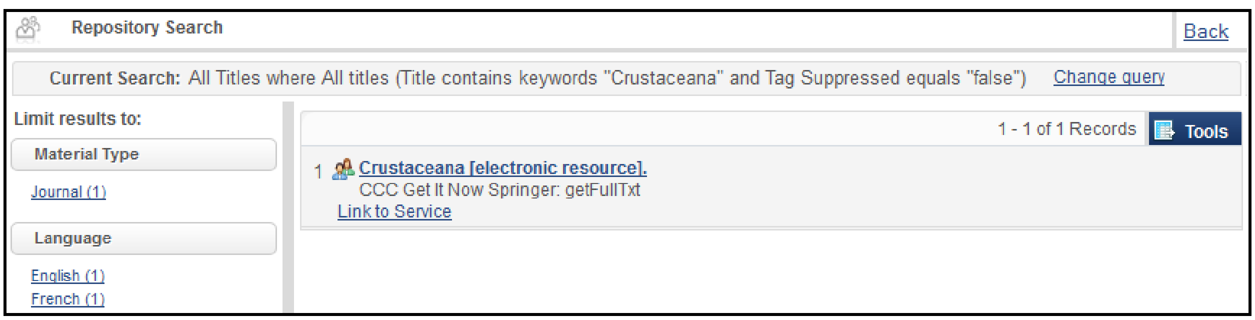


Figure 49 – Electronic Portfolio Page

3 Click **Link to Service** to display information about the article. The operator uses the CCC interface to request the article.

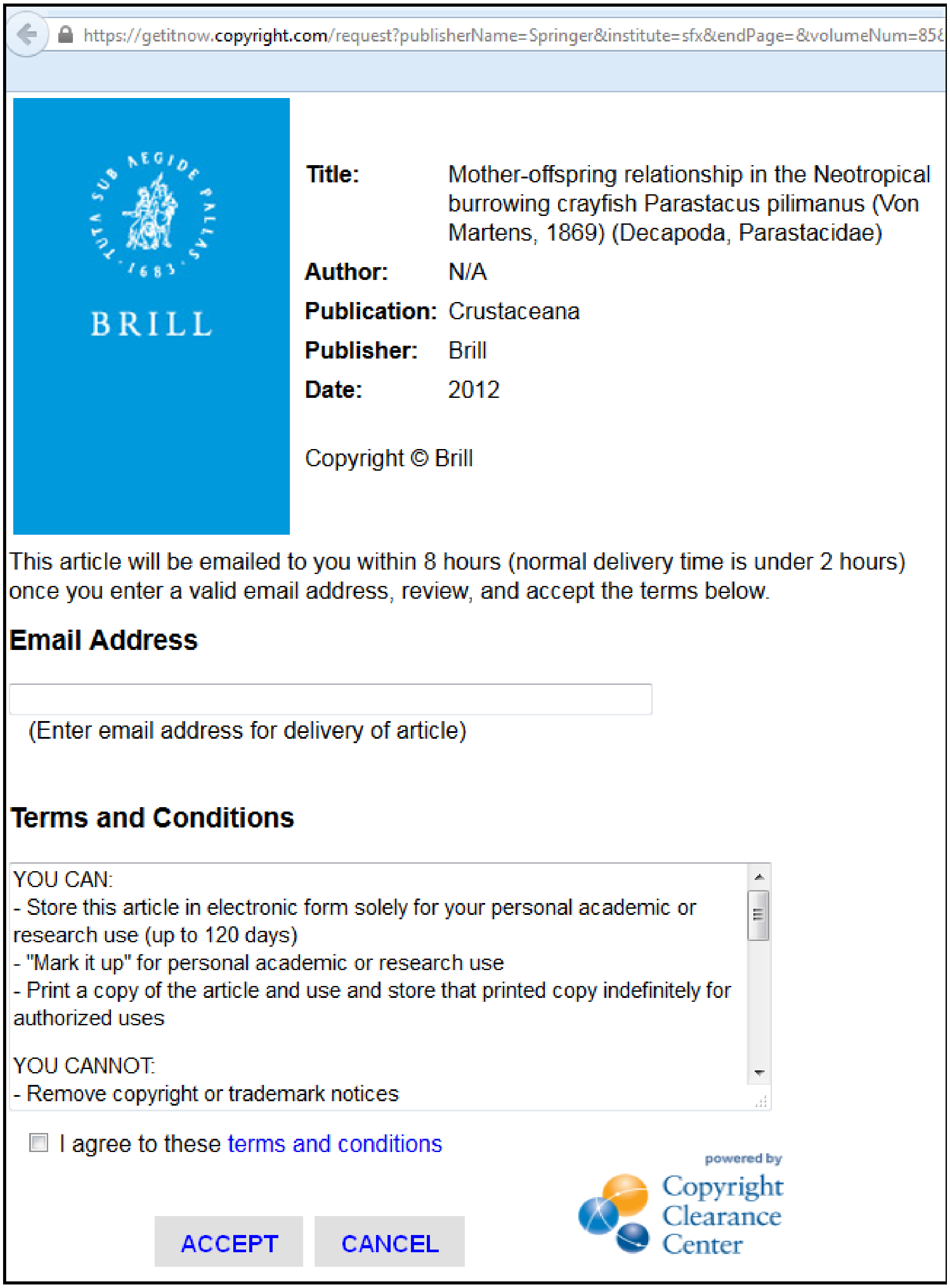


Figure 50 – Article Information

4 On returning to the resource sharing task list, a new action is available, **Externally Obtained**. Click this link to display a send email window. Enter the URL supplied by the GetItNow service in this window, and send the URL to the requesting patron.

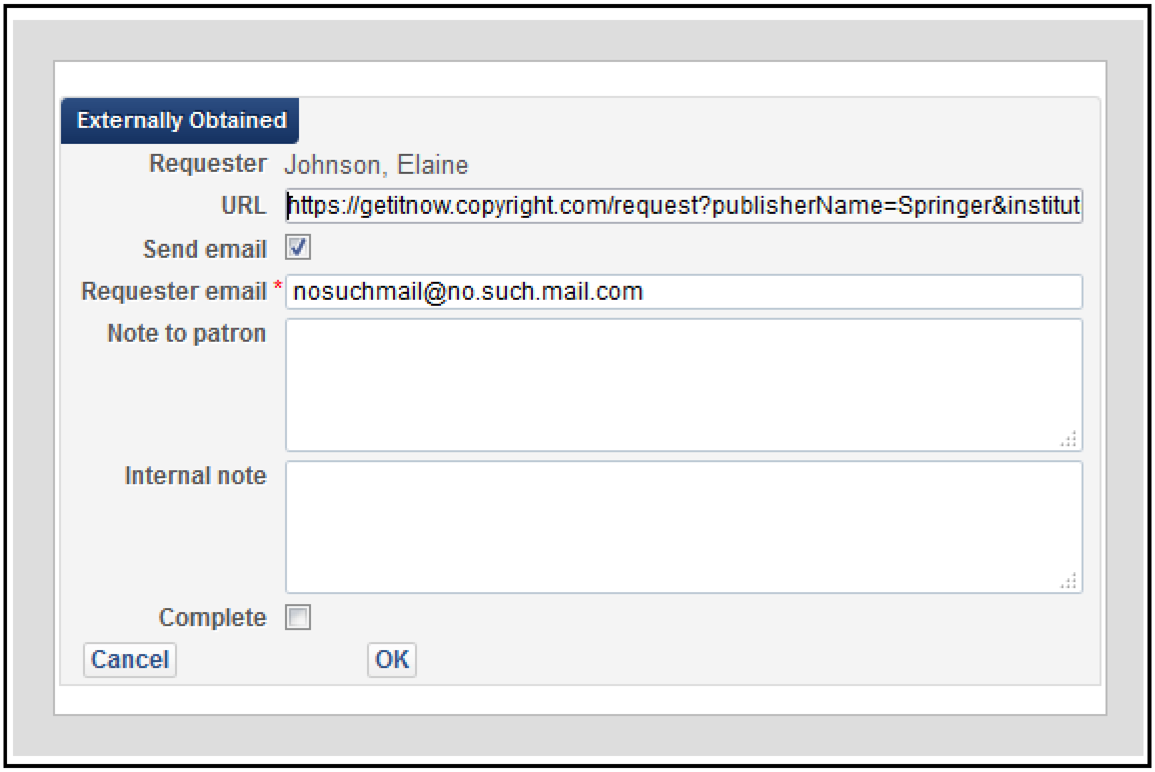
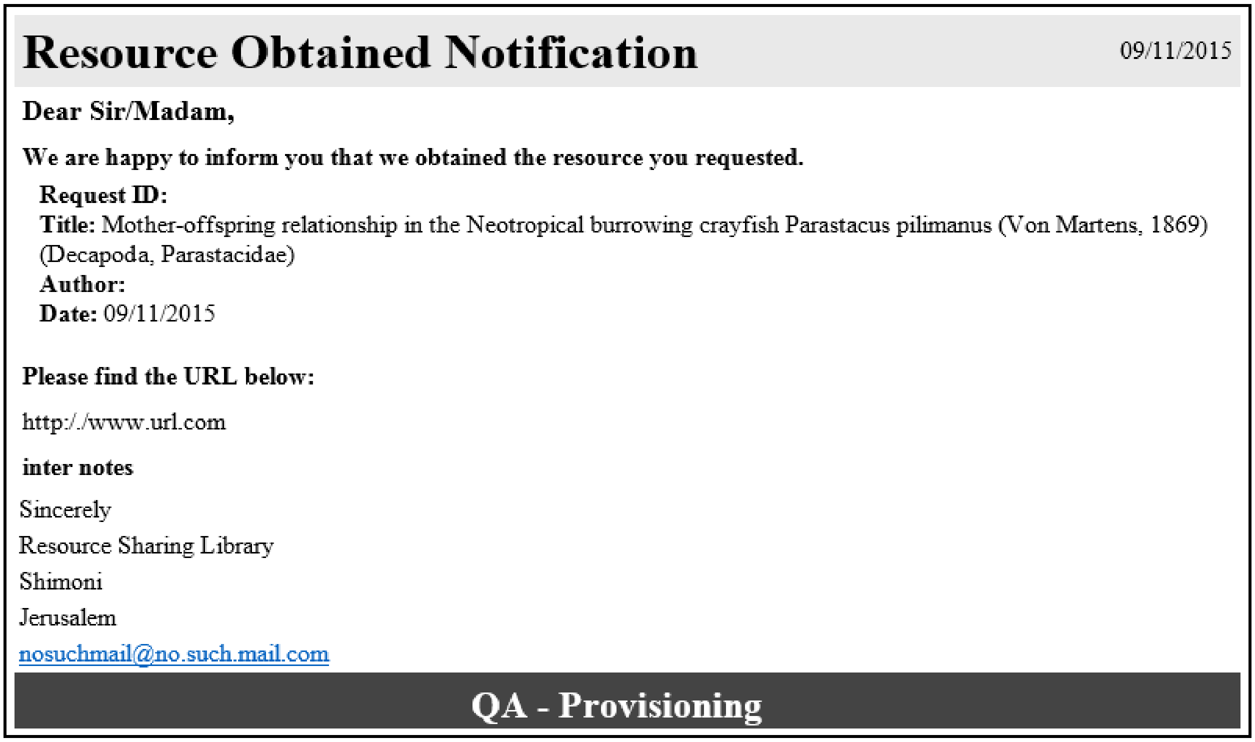


Figure 51 – Externally Obtained Email Dialog Box

Selecting the **Complete** box marks the request as **Completed** once you click **OK** to send this email to the patron. The following is a sample of the email.



Resource Obtained Notification

09/11/2015

Dear Sir/Madam,

We are happy to inform you that we obtained the resource you requested.

Request ID:
Title: Mother-offspring relationship in the Neotropical burrowing crayfish Parastacus pilimanus (Von Martens, 1869) (Decapoda, Parastacidae)
Author:
Date: 09/11/2015

Please find the URL below:

http:/./www.url.com

inter notes

Sincerely
Resource Sharing Library
Shimoni
Jerusalem
nosuchmail@no.such.mail.com

QA - Provisioning

Figure 52 – Patron Notification Email

This email may be modified from the letter configuration files. The letter name is **Externally Obtained Email Letter**.

Create Resource Sharing Fee When Item Is Received

Description

A resource sharing operator can now set or override the resource sharing fee and shipping cost defined in the Resource Sharing Fee policy when receiving an item on a borrowing request.

This is useful for enabling library staff to manually attach fees for resource sharing services at receive time, or to adjust the automatically calculated fees.

Step-by-Step Instructions

The following roles can configure resource sharing fees:

- General System Administrator

- Fulfillment Administrator

The following roles can view or modify request fees:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure resource sharing fees:

1. Access the Fulfillment Terms of Use Details page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**).
2. Add a new borrowing resource sharing Terms of Use or edit an existing one.

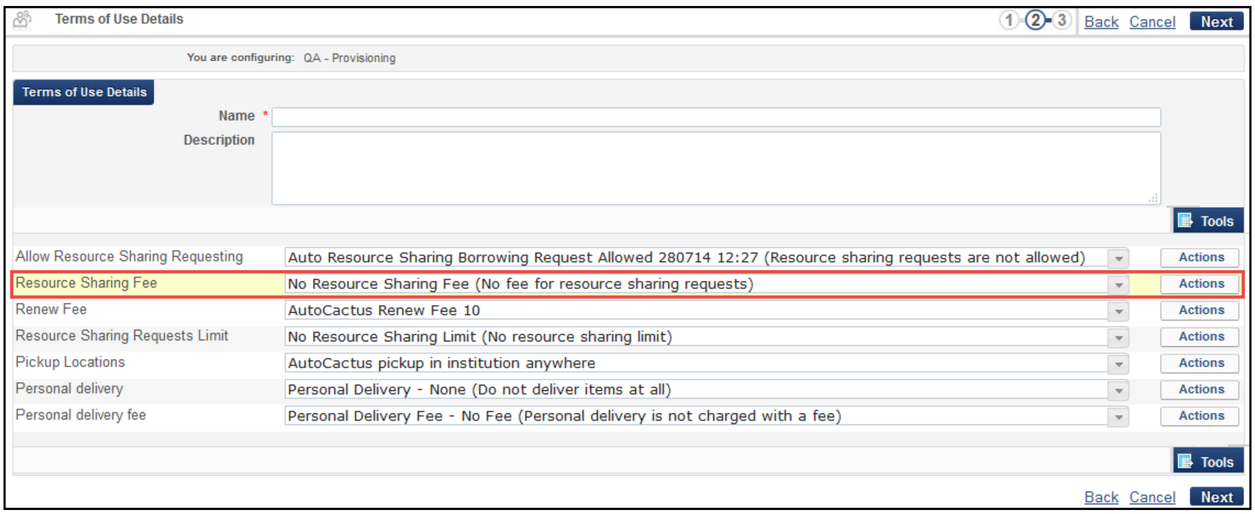


Figure 53 – Terms of Use Details with Resource Sharing Fee

The Terms of Use defaults to no resource sharing fee.

3. To create a policy, select the blank line from the drop-down list, and select **Actions > Add Policy**.

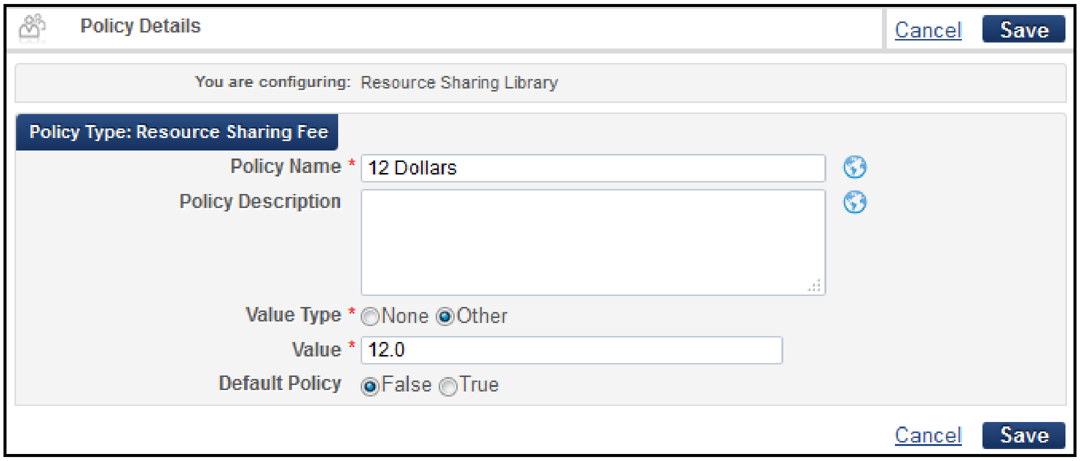


Figure 54 – Policy Details Page

4 On the Policy Details page, select **Other** for **Value type**. Enter a number in the **Value** field. Then select **True** or **False** to define whether this is a default policy.

To view or modify request fees:

1 From the resource sharing task list, click **Receive** from an item's actions.

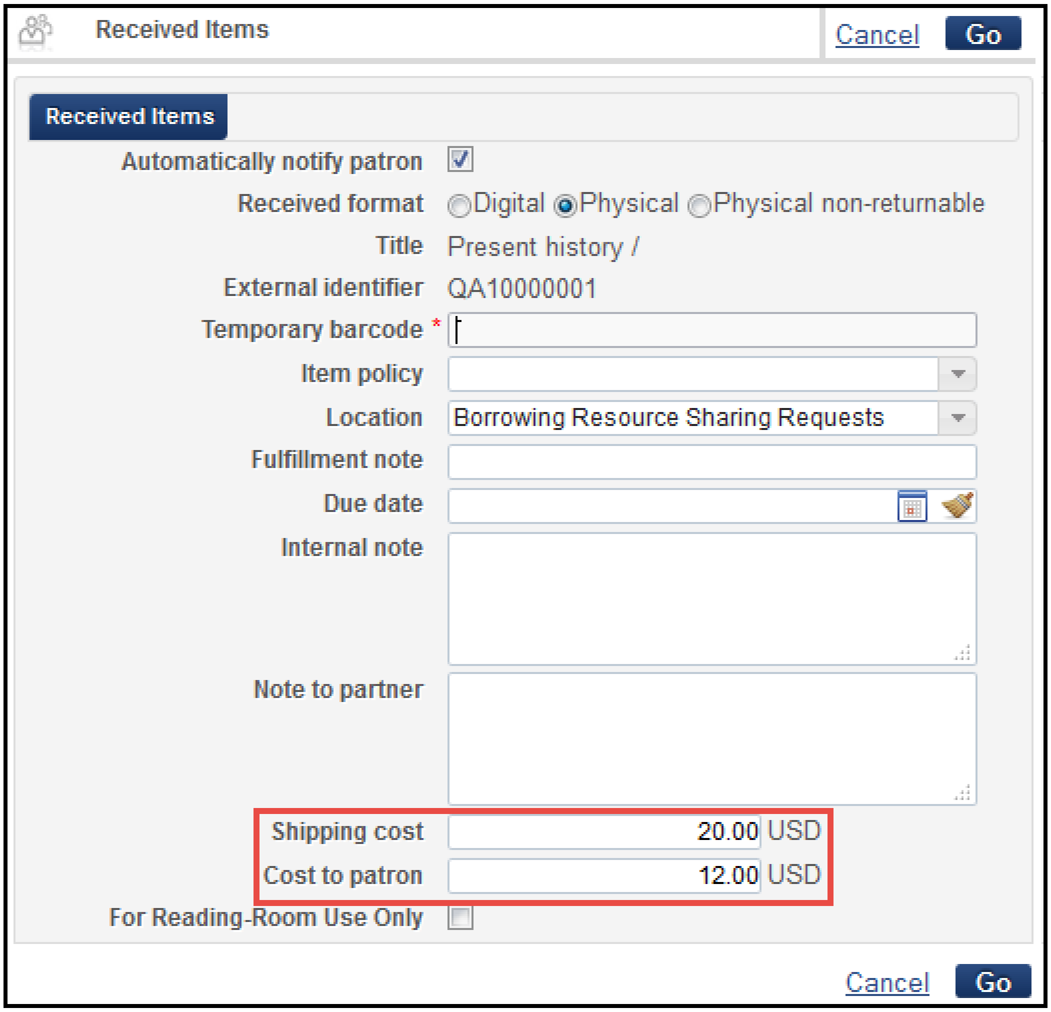


Figure 55 – Received Item Page

The values of the **Shipping cost** and the **Cost to patron** are based on relevant policies. You can override the system defined defaults at this point.

In addition, the costs may be updated after the receive action is performed from the request edit form.

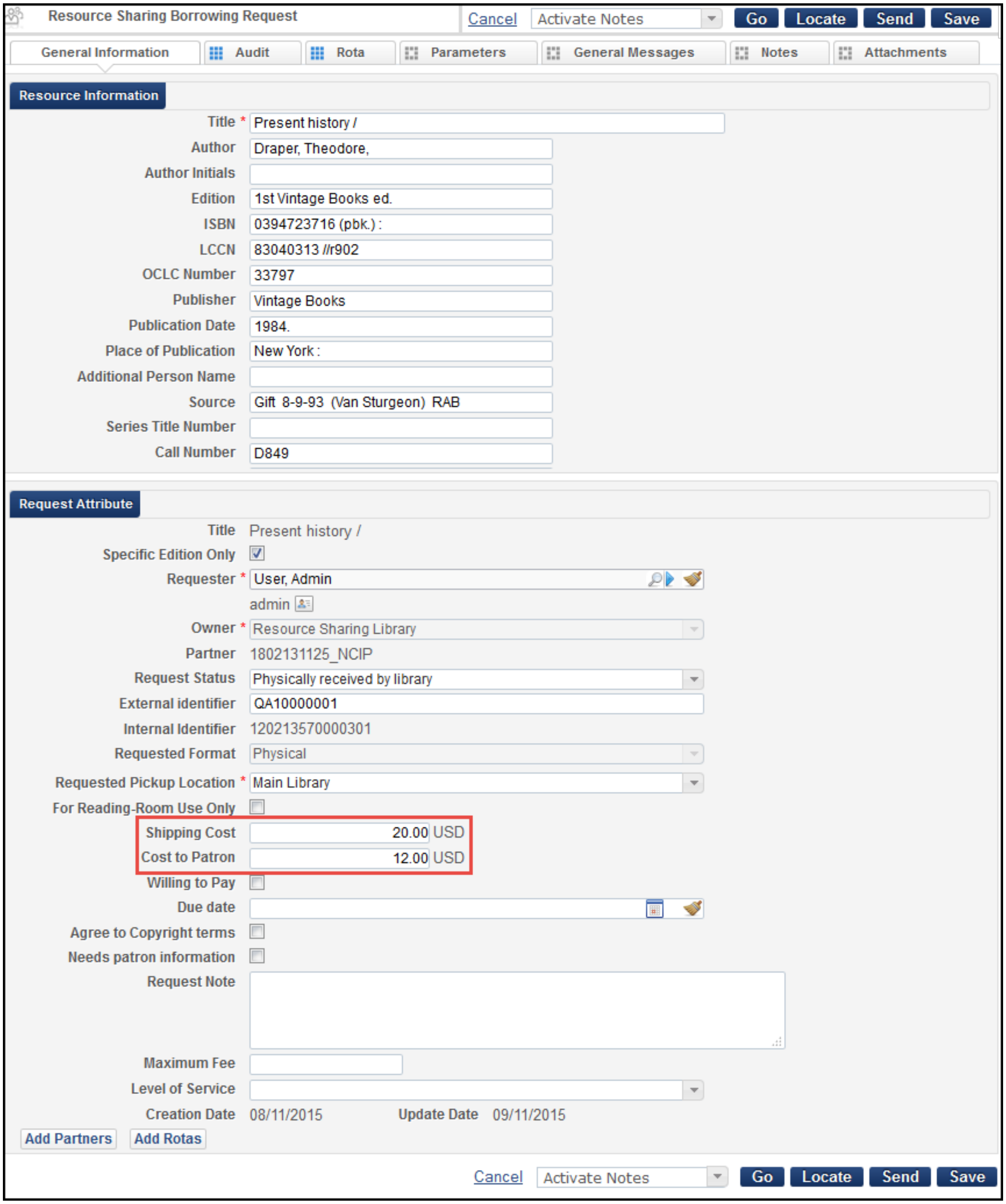


Figure 56 – Resource Sharing Borrowing Request Page

2 When saving the request, edit the costs as required.

To view a patron's fines:

1 Access the Manage Patron Services page (**Fulfillment > Checkout/Checkin > Manage Patron Services**)

2 Select a patron and click the **Fines/Fees** tab.

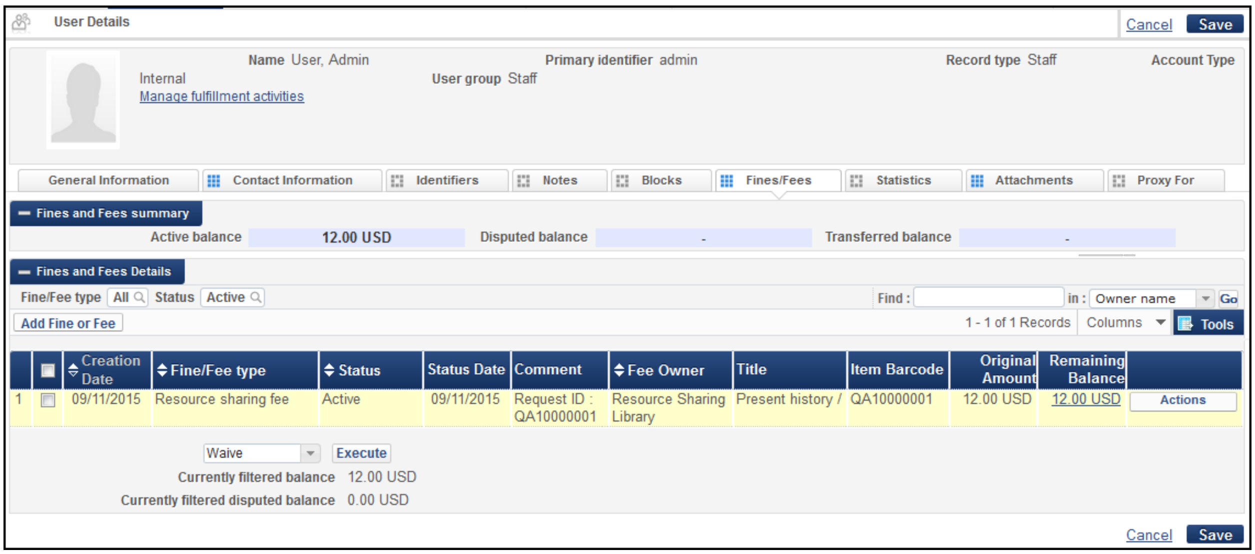


Figure 57 – User Details Fines/Fees Tab

If the request is updated after the fine has been applied to the patron's account, the amount will be updated here in the fines/fees tab as well.

Level of Service Management

Description

Operators and patrons can now define Level of Service as part of resource sharing requests. A library that wants to allow the patrons to specify the level of service on a request form must turn that option on, as described below.

Level of Service is included in the lending request slip data and in the request email that is sent by the borrower to email partners. You must add it to the form XSL if you want to add it to the printed letter.

The rota assignment rules and the shipping costs rules may also be set up to consider a request's level of service when automatically assigning a rota to a request.

This enables the library to supply services that better meet the patron’s needs, such as the ability to handle rush requests.

Step-by-Step Instructions

The following roles can configure the levels of service:

- Fulfillment Administrator
- General System Administrator

The following roles can manage borrowing and lending requests:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure the levels of service:

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings** and locate the parameter **rs_display_level_of service**. This value determines whether the level of service is available on the Primo request form.

Mapping Table Cancel Save

You are configuring: QA - Provisioning

Table Information

Sub System INFRA Table Name Customer Parameters
Updated By - Last Updated -
Table Description Customer Parameters

Mapping Table Rows

Tools

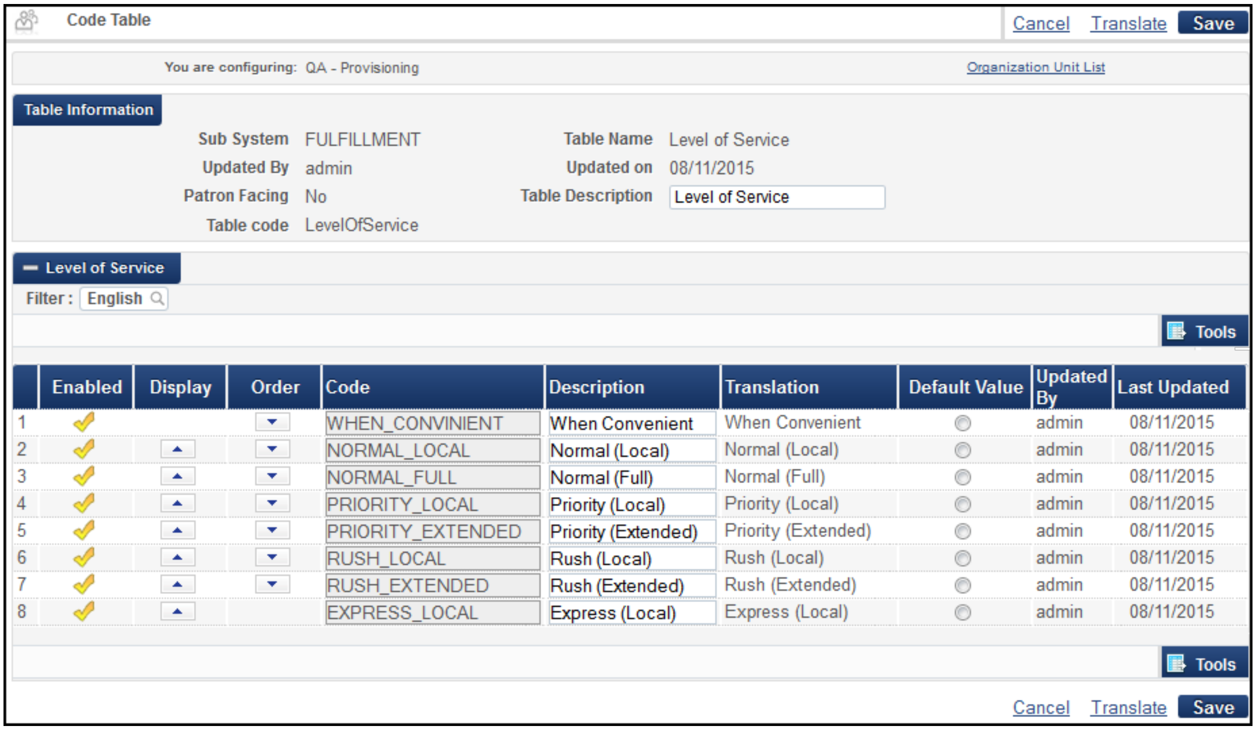
	parameter key	parameter module	parameter value	free text description	
1	auto_renew_loan_days	fulfillment	2	The days period to auto renew ite	Customize
2	check_self_ownership_serial	fulfillment	true	Should self ownership be checke	Customize
3	demerit_enable	fulfillment	false	Whether the customer uses dem	Restore
4	demerit_history_days	fulfillment	0	How many days back loan histor	Customize
5	demerit_maximum_threshold	fulfillment	0	Number of demerits after which u	Customize
6	demerit_suspension_days	fulfillment	0	Period of days for suspension	Customize
7	distribute_fulfill_changes_last_run	fulfillment		Last run time of the job	Customize
8	email_partner_configurable_line1	fulfillment			Customize
9	email_partner_configurable_line2	fulfillment			Customize
10	enable_moving_item_to_hold_shelf_fro	fulfillment	false	Should requetsed item move to h	Customize
11	enable_request_during_loan_for_differe	fulfillment	false	When user has an active loan, er	Customize
21	overdue_at_claim_return_loan	fulfillment	false	Create overdue charges when ite	Customize
22	overdue_at_lost_loan	fulfillment	true	Create overdue charges when ite	Customize
23	patron_services_timeout_minutes	fulfillment	2	Timeout (in minutes) for the patro	Customize
24	prefer_doc_delivery_from_e-resources	fulfillment	true	when both P to D and E to D digit	Restore
25	prefer_remote_storage	fulfillment	false		Customize
26	primo_loan_list_sorting	fulfillment	descending		Customize
27	remember_last_loan_display	fulfillment	false	Determine if the loan workbench	Customize
28	results_best_location_enable	fulfillment	false		Customize
29	return_lost_loan_from_self_check	fulfillment	true	Is returning a lost loan from self-c	Customize
30	rs_auto_request_lending	fulfillment	false		Customize
31	rs_borrower_copyright_management	fulfillment	false		Customize
32	rs_default_digitization_department	fulfillment			Customize
33	rs_default_pickup_location	fulfillment			Customize
34	rs_disable_lending_auto_assign	fulfillment	false	automatic assignment of lending	Customize
35	rs_display_level_of_service	fulfillment	false	Display level of service field in g	Customize
36	rs_prefer_recall_method	fulfillment	false		Customize
37	rs_support_add_service	fulfillment	true		Customize

Figure 58 – Customer Parameters Mapping Table - Levels of Service

2 Click **Customize** and enter `True` in the **parameter value** field.

3 Click **Save**.

4 Access the Levels of Service configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Levels of Service**).



Code Table — Cancel | Translate | Save

You are configuring: QA - Provisioning — Organization Unit List

Table Information

Sub System: FULFILLMENT
Updated By: admin
Patron Facing: No
Table code: LevelOfService
Table Name: Level of Service
Updated on: 08/11/2015
Table Description: Level of Service

Level of Service

Filter: English

Tools

	Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated
1	✓		▼	WHEN_CONVINIENT	When Convenient	When Convenient	○	admin	08/11/2015
2	✓	▲	▼	NORMAL_LOCAL	Normal (Local)	Normal (Local)	○	admin	08/11/2015
3	✓	▲	▼	NORMAL_FULL	Normal (Full)	Normal (Full)	○	admin	08/11/2015
4	✓	▲	▼	PRIORITY_LOCAL	Priority (Local)	Priority (Local)	○	admin	08/11/2015
5	✓	▲	▼	PRIORITY_EXTENDED	Priority (Extended)	Priority (Extended)	○	admin	08/11/2015
6	✓	▲	▼	RUSH_LOCAL	Rush (Local)	Rush (Local)	○	admin	08/11/2015
7	✓	▲	▼	RUSH_EXTENDED	Rush (Extended)	Rush (Extended)	○	admin	08/11/2015
8	✓	▲		EXPRESS_LOCAL	Express (Local)	Express (Local)	○	admin	08/11/2015

Tools

Cancel | Translate | Save

Figure 59 – Levels of Service Code Table

5 You can enable or disable the levels, and you can change the descriptions. Click **Save** when you are done.

After you configure the levels of service, you can set the field value in the Primo request form and the borrowing and lending requests. The field also appears on the resource sharing task lists.

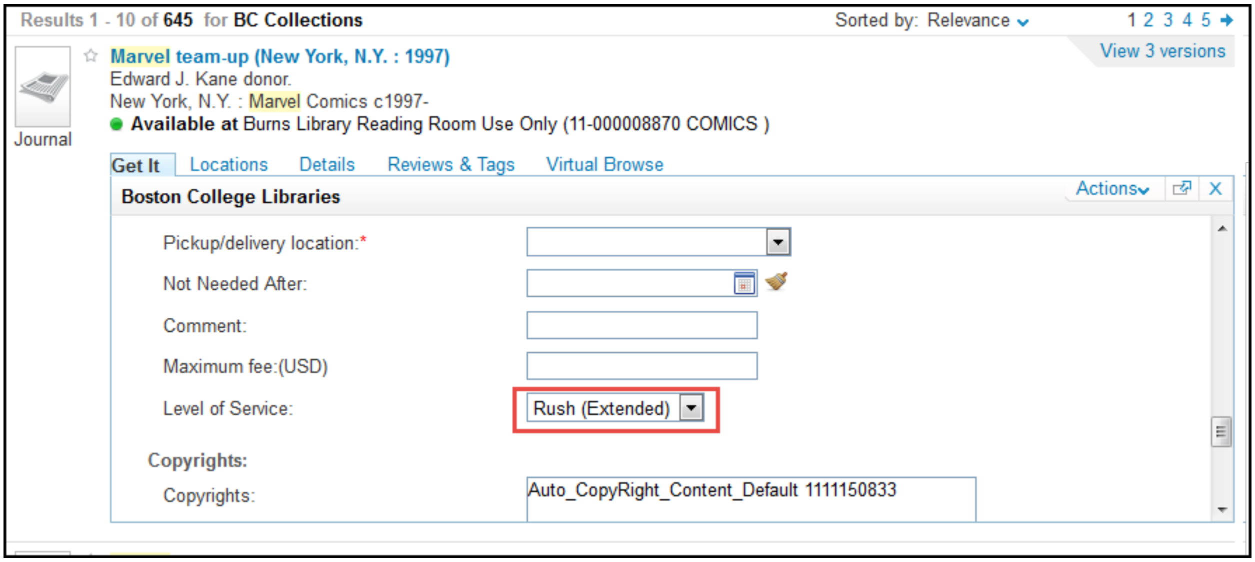


Figure 60 - Primo Get It Tab

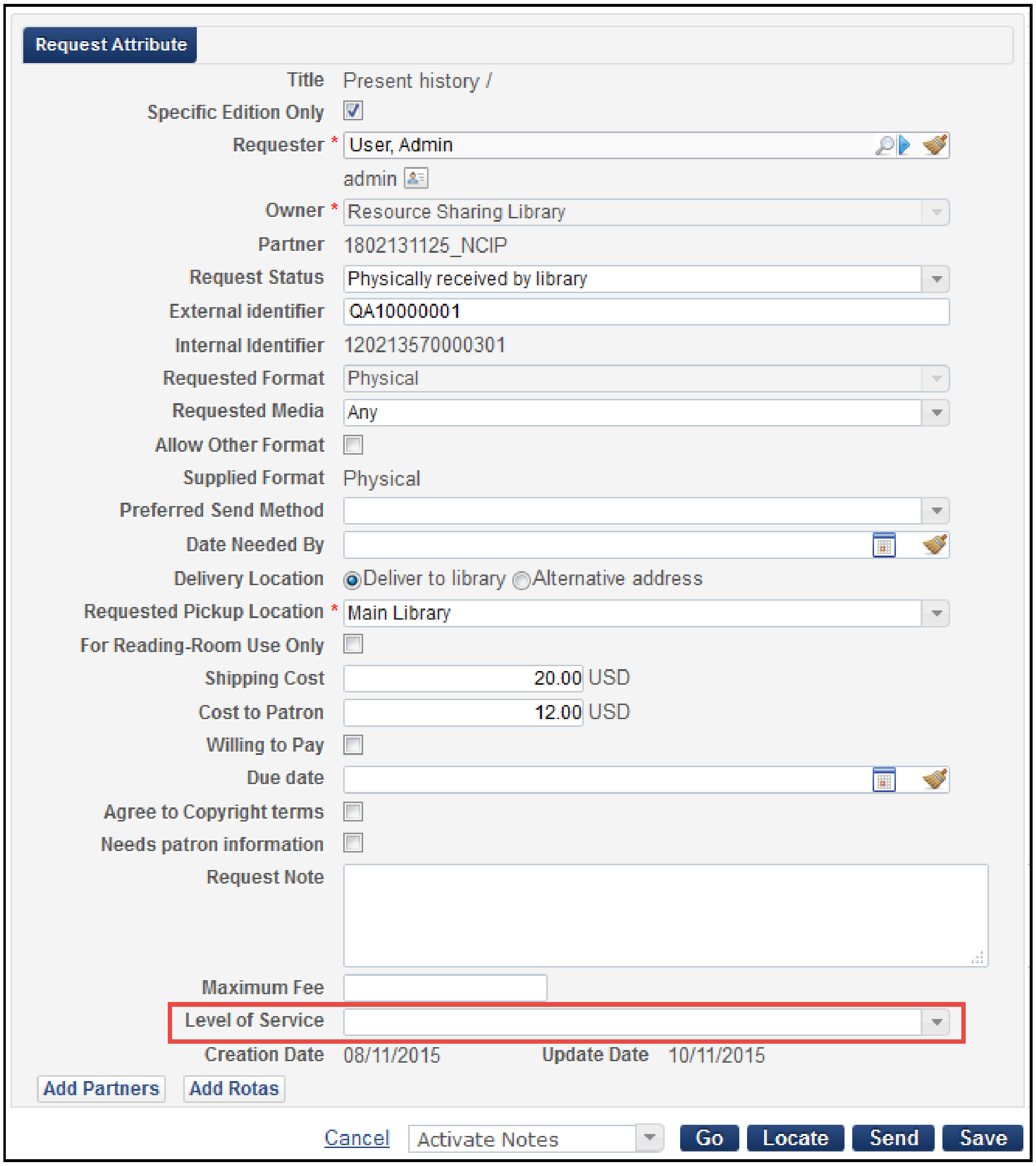


Figure 61 – Resource Sharing Request – Level of Service

Figure 62 - Resource Sharing Lending Requests Task List – Level of Service

To modify the rota assignment rules:

Access the Rota Assignment Rules page **(Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Rota Assignment Rules)**. Select **Level of Service** as an input to the rule. To select one value, choose **=** for the operator. To select more than one value, select **InList** as the operator. All of the enabled levels of service appear for the selection. Click **Add Parameter** once the values are selected.

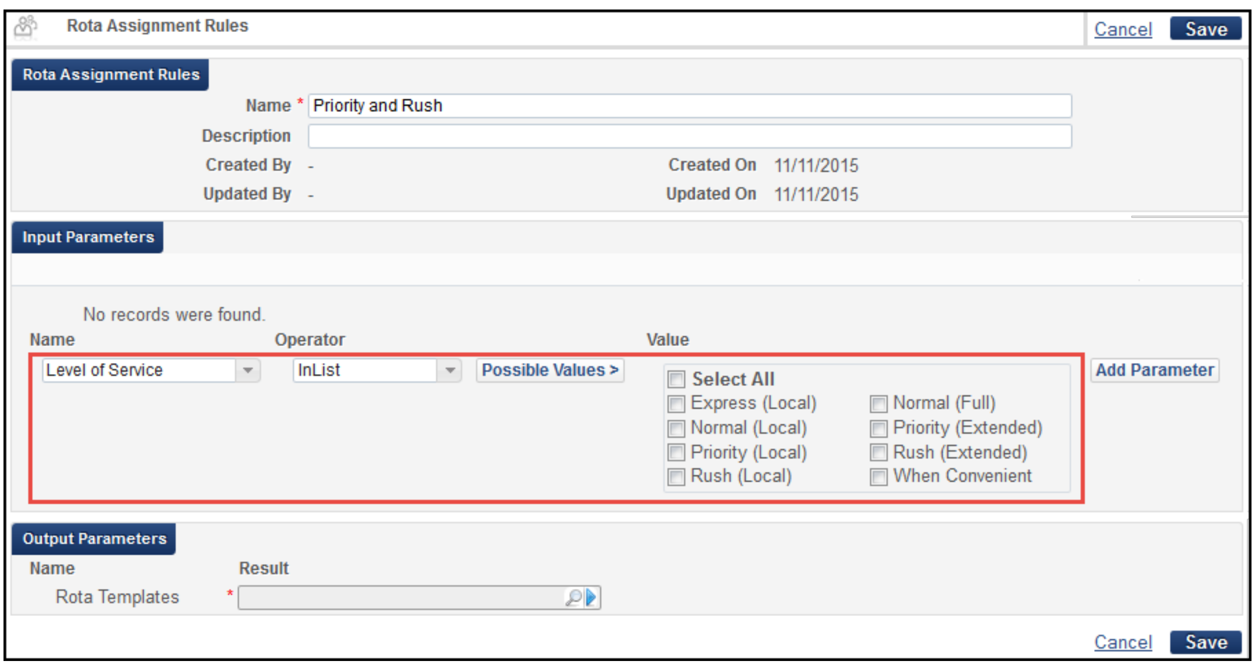


Figure 63 - Rota Assignment Rules Page

To modify the shipping costs rules:

- Access the Shipping Cost Lender Rules page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Shipping Cost Lender Rules**). Select **Level of Service** as an input to the rule. To select one value, choose **=** for the operator. To select more than one value, select **InList** as the operator. All of the enabled levels of service appear for the selection. Click **Add Parameter** once the values are selected.

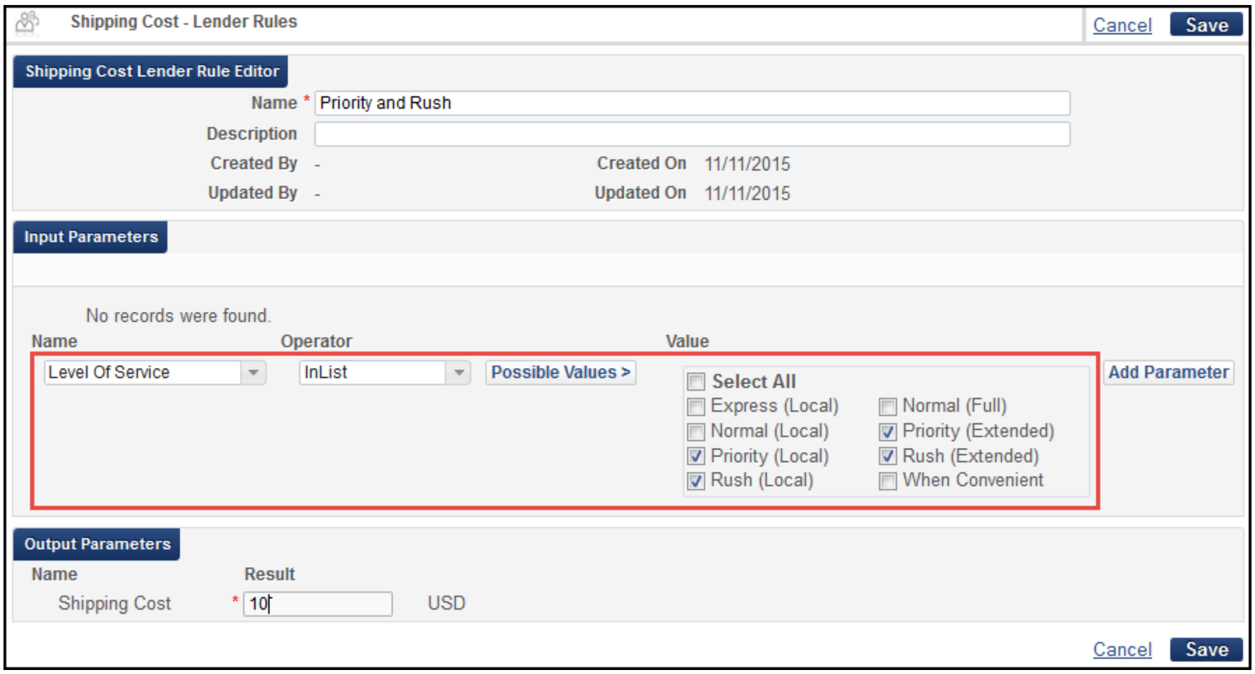


Figure 64 - Shipping Cost Lender Rules Page

- Access the Shipping Cost Borrower Rules page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Shipping Cost Borrower Rules**). Select **Level of Service** as an input to the rule. To select one value, choose = for the operator. To select more than one value, select **InList** as the operator. All enabled levels of service appear for selection. Click **Add Parameter** once the values are selected.

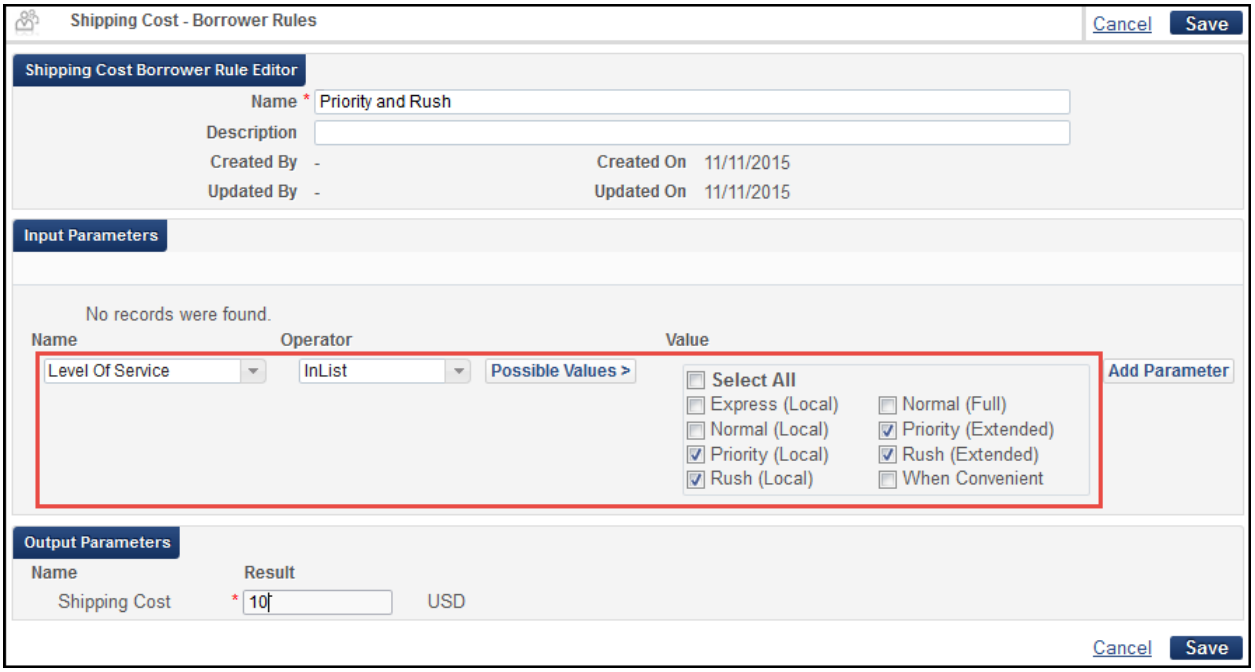


Figure 65 - Shipping Cost Borrower Rules Page

Other Resource Sharing Enhancements

- The broker workflow was enhanced with new messages for request renew and request recall. For detailed information on this NCIP enhancement, see https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker/ncip.
- The peer-to-peer NCIP cancel, renew, and recall responses were enhanced to handle an automatic workflow. The cancel and renew responses now include indicators to determine whether the processes were successfully completed. For detailed information on these enhancements, see https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/p2p.
- Barcodes are now case-insensitive when receiving resource sharing items by barcode.
- The name of the searchable field in the **In** search box on the Resource Sharing Borrowing Requests Task List page was changed from **Identifier** to **User Identifier**. Note that the values that can be used in the **Find** box are the exact values that appear in the Identifiers tab of the user record before the request is created or edited. (This has always been the functionality.)

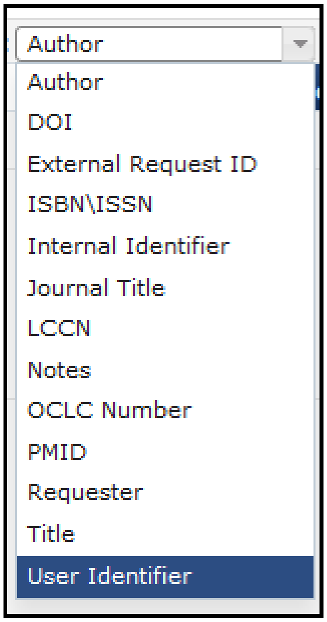


Figure 66 - User Identifier in the In Box

- Full metadata of a resource sharing request was added to the Place on Hold Shelf letter XML. This enables you to add data, such as the article title, to the printed slips.

Administration

The following enhancements were made in the Administration functional area:

- The Scheduled Job Status widget on the Alma home page now includes a line for scheduled import jobs. Clicking **Import** opens the Monitor Jobs page. Note that manually run import jobs are not considered in the summaries (as is the case for the other lines in the widget).

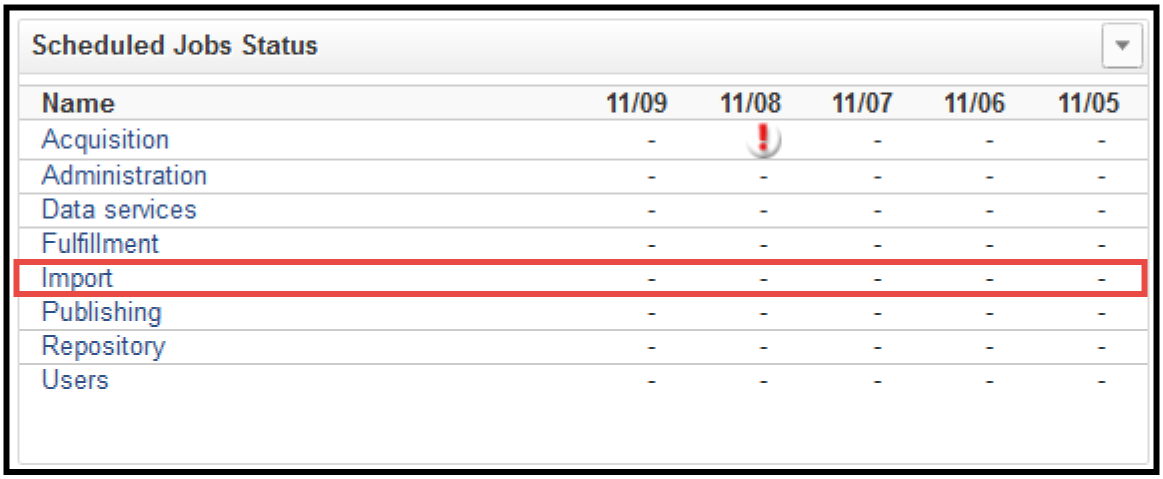


Figure 67 - Scheduled Job Status Widget

- A new test was added to the Fulfillment section of the Alma HealthCheck Tool:

  `External patron able to create a request` - Can external users with the role of `Patron` create a request through a discovery system (for example, Primo)?

Collaborative Networks and Multicampus Institutions

The following collaborative network enhancements were made for this release of Alma:

- When changing a distributed user in the Network Zone, the update now automatically distributes to all other collaborative network members. This applies to activate/deactivate, delete, and update operations. If a user was modified locally, the Network Zone update overwrites the local change.

  Upon executing any of these actions, a confirmation message similar to the one below now appears.

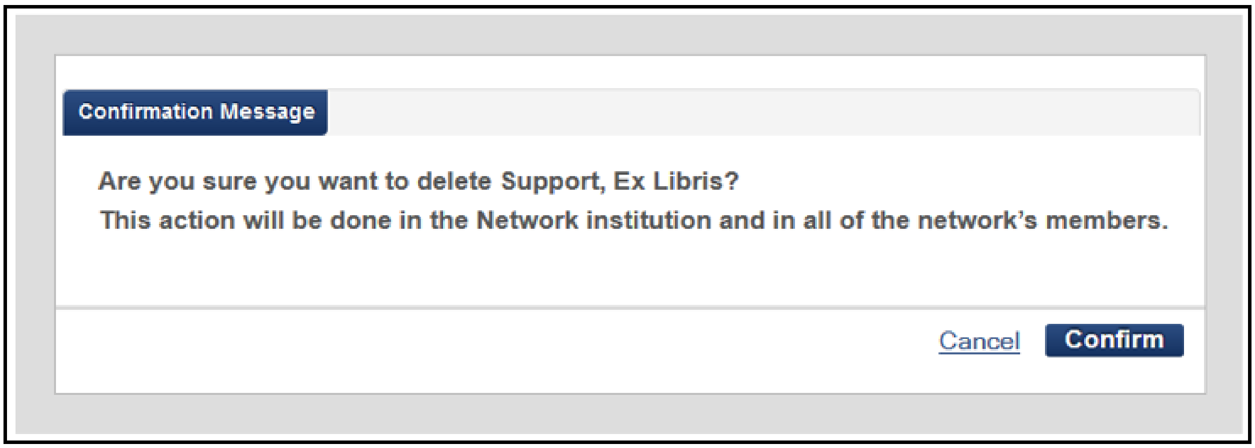


Figure 68 – Confirmation Message

Analytics

The following sections describe new or changed Analytics features in this release of Alma.

Additional Configurations for Analytics Jobs

Description

Alma now provides enhanced options when scheduling the generation of Analytics dashboards or reports on the Analytics Configuration page (**Administration > Analytics > Configuration Menu > General Configuration > Analytics Object List**; click **Add New Analytics Object**). Primarily, staff users can now schedule dashboards and reports to run at a time that coincides with the completion of the ETL process.

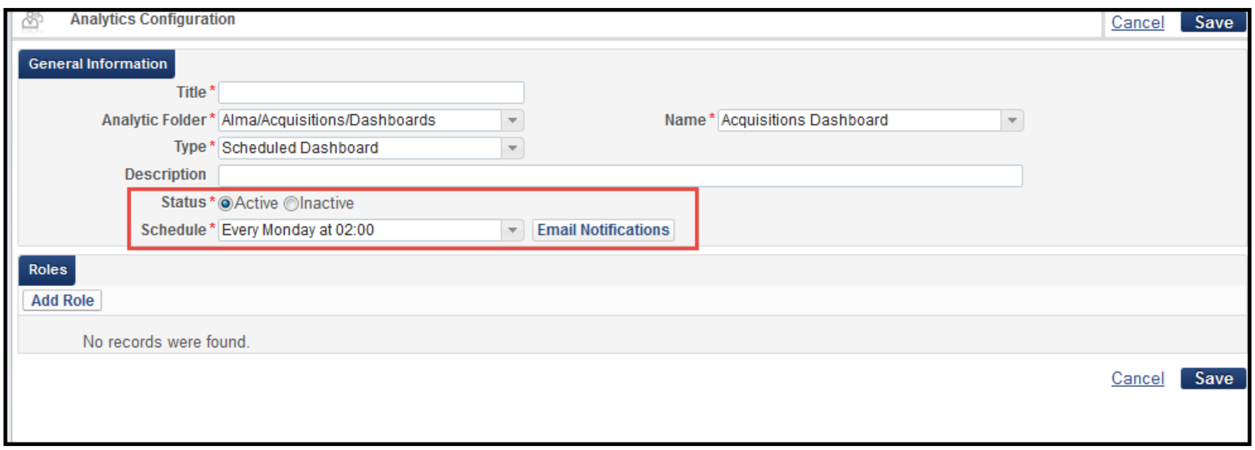


Figure 69 - Analytics Configuration Page

- You can set the schedule for the generation of each report or dashboard as active or inactive.
- You can select among several options to schedule the job. All dashboards and reports that use the same scheduling option are run by the same Analytics job (see **Viewing All Scheduled Jobs** in the *Alma Administration Guide* or *Alma Online Help*). The existing daily, weekly, and monthly Analytics jobs were doubled. Two jobs now run for each time interval:
  - **Schedule of Analytics reports and dashboards – Daily** – Two jobs, run daily at a time that is dependent on your institution's time zone

- **Schedule of Analytics reports and dashboards – Weekly** – Two jobs, run every Monday at a time that is dependent on your institution's time zone
- **Schedule of Analytics reports and dashboards – Monthly** – Two jobs, run on the 02 of every month at a time that is dependent on your institution's time zone

Note: If one of these jobs is disabled, all dashboards and reports scheduled to be generated by the disabled job are not generated.

- You can configure users and email addresses to receive notification after the job runs.

For more information, see **Scheduling** in the *Alma Analytics Guide* or *Alma Online Help*.

Step-by-Step Instructions

The following role can schedule the job that creates an Analytics dashboard or report:

- Design Analytics

To use the new features while scheduling a job:

See the process **To schedule a report:** in **Scheduling** in the *Alma Analytics Guide* or *Alma Online Help*. In step 3 of this process:

1. Select **Active** or **Inactive** for the job's status.
2. Select the time for the job to run. The time is dependent on your institution's time zone.

Note: All of the options are available, even if the corresponding Analytics jobs are disabled. All dashboards and reports scheduled to be generated by a disabled job are not generated.

3. Click **Email Notifications** to configure email notifications for each specific report or dashboard. Clicking this button opens the Email Notifications for Scheduled Jobs page. For more information, see **Configuring Email Notifications for Scheduled Jobs** in the *Alma Administration Guide* or *Alma Online Help*.
4. Continue with the rest of the process.

Course Instructor Field Added

Description

The **Course Instructor** field was added to the following dimensions:

- Course Reserves > Course
- Requests > Requests for Course

This field displays the name of the course instructor. If there is more than one instructor, the names are separated by a semicolon.

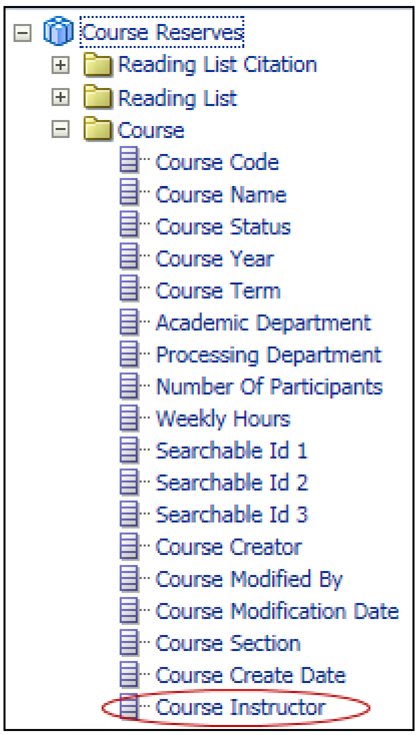


Figure 70 – Course Instructor (Course Reserves)

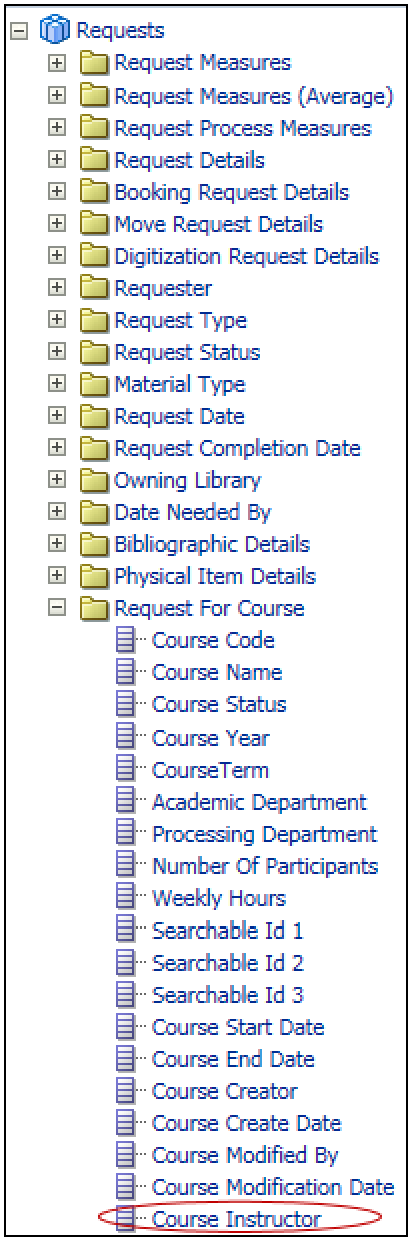


Figure 71 – Course Instructor (Requests)

Step-By-Step Instructions

The Design Analytics role can access this enhancement. The following are examples of reports that display the Course Instructor.

Course Instructor	Course Name	Number Of Citations
Adler, Gary	Religion, faith, and social change	19
Akcakaya, Yasemin	Strategic Management	3
Akinc, Bridget	Marketing Principles	4
Akinc, Bridget;Clarke, Patricia	Marketing Principles	3
Akman, Bahar	International Security and Peace	67
Albert, Lillie	Mathematical Problem Solving 4-12	2
	Secondary/Middle School Math Methods	3
	Teaching Mathematics and Technology	17
Albert, Richard	Consitutional Law II	1
	Constitutional Law I	6
	Constitutional Law II	1
	Constitutional Politics	1
	Constitutional Politics Seminar	1
	Law of Democracy	2

Figure 72 – Course Instructor (Course Reserves) Report

Course Instructor	Course Name	# of requests
Anderson, Lynne;Faircloth, Catherine	First Year Writing Seminar for English Language Learners	1
Bayles, Martha	Americans, Ugly or Beautiful	1
Bernauer, James	The Holocaust: a Moral History	1
Blake, Richard	American Directors Series	4
	History of the American Film :Pre War Years	1
Braun, Henry	Introduction to Mathematical Statistics	2
Breen, Marcus;Sienkiewicz, Matthew	Globalization and the Media	3
Brinton, Aspen	Ethics, Religion, and International Politics	1
	Person and Social Responsibility I	2
	Philosophies of Dissent	2

Figure 73 – Course Instructor (Requests) Report

Number of Loans

Description

Two new fields were added to the Physical Item Details dimension of the Physical Items subject area:

- Num of Loans (In House)
- Num of Loans (Not In House)

These fields enable you to create reports that differentiate between items that were used in the library, but not actually loaned, and items that were actually loaned.

In addition, the **Num of Loans** field was renamed **Num of Loans (In house + Not In House)** to indicate that this field includes both In House and Not In House loans.

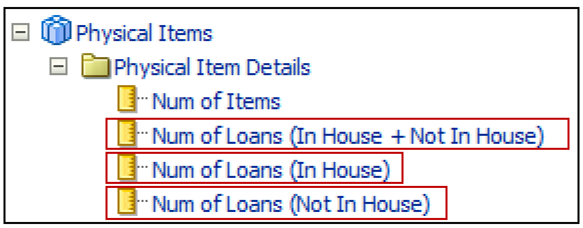


Figure 74 – Num of Loans

Notes:

- Historic data for the new fields will be available only several days after the release.
- Historic data for the new fields is available only for institutions that implemented Alma in the last six months.

Step-By-Step Instructions

The Design Analytics role can access this enhancement. The following is an example of a report that displays the new fields:

Item Creation Year	Num of Loans (In House + Not In House)	Num of Loans (In House)	Num of Loans (Not In House)
2012	770,412	271,095	499,317
2013	95,935	50,864	45,071
2014	70,471	41,380	29,091
2015	11,014	8,031	2,983
Grand Total	**947,832**	**371,370**	**576,462**

Figure 75 – Num of Loans Report

Citation Attribute, Material Type, and Copyright Status Fields Added to Course Reserves

Description

Alma enables you to add attributes to citations. These attributes are configurable and can be grouped into attribute types. You can now display the citation attributes in an Analytics report. To support this functionality, the Citation Attribute fields (1-5) were added to the **Reading List Citation** dimension of the **Course Reserves** subject area.

In addition, the following fields were added to this dimension:

- Citation Material Type
- Citation Copyright Status

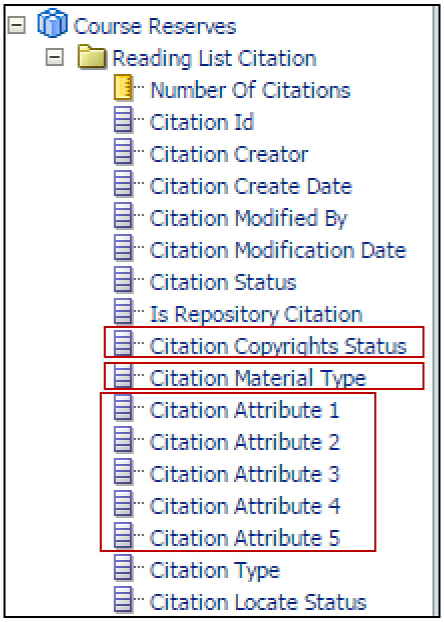


Figure 76 – Citation Copyright Status, Material Type, and Attribute

Step-By-Step Instructions

The Design Analytics role can access this enhancement.

To configure the Analytics Citation Attribute fields:

1. Configure citation attribute types, citation attributes, and then configure citation attributes to citation attributes types as described in the **Configuring Fulfillment** section of the *Alma Fulfillment Guide* or the *Alma Online Help*.
2. Open the Analytics Citation Attribute Types page (**Administration > Analytics > Configuration Menu > Analytics Citation Attribute Types**). The following appears.

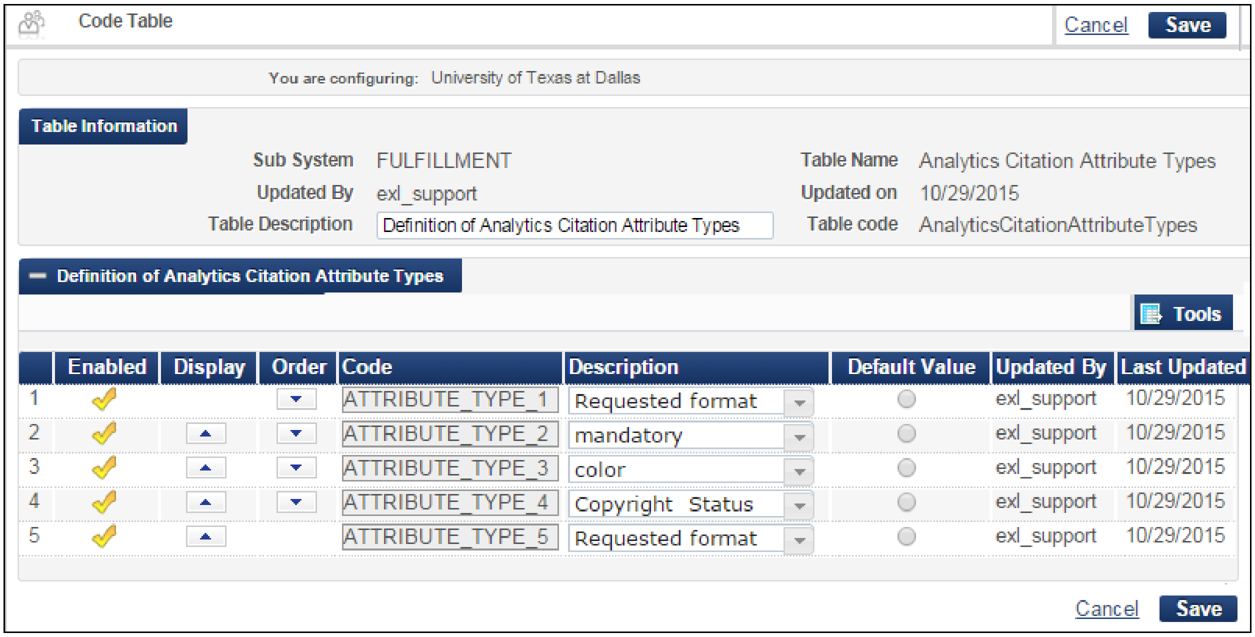
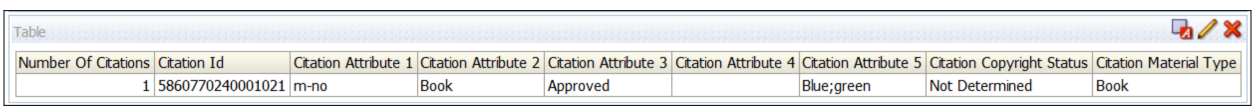


Figure 77 – Analytics Citation Attribute Types

3 From the **Description** drop-down list, select a citation attribute type for each Analytics Attribute Type field.

4 Click **Save**.

When running a report with the Attribute Type fields, the attributes of the mapped attribute type appear, separated by a semicolon:



Table

Number Of Citations	Citation Id	Citation Attribute 1	Citation Attribute 2	Citation Attribute 3	Citation Attribute 4	Citation Attribute 5	Citation Copyright Status	Citation Material Type
1	5860770240001021	m-no	Book	Approved		Blue;green	Not Determined	Book

Figure 78 – Analytics Citation Attribute Types Report

Resource Sharing Audit Statistics Added to Analytics

Description

Actions taken on resource sharing borrowing or lending requests (such as changing the request's status or adding a shipping cost) are available from the Audit tab when editing a resource sharing request. This information can now be displayed in an Analytics report. To support this functionality, the list of fields in the Borrowing Request Details dimension of the

Borrowing Requests subject area was split into two sections – **Request Level Measurements** and **Partner Level Measurements** – and the following fields were added:

- Request Level Measurements
  - Number of Request Renewals
  - Num of Request Renewal Rejections
  - Num of General Messages
- Partner Level Measurements
  - Num of Partners in Rota (Total)
  - Num of Partners in Rota (Consulted)
  - Num of Canceled Partner Requests
  - Num of Expired Partner Requests
  - Days of Request for Partner

Figure 79 – Borrowing Request Details

The following are two examples of reports using the new fields, in chart format.

Figure 80 – Top 10 Partners with the Most Number of Canceled Borrowing Requests in the Last Year

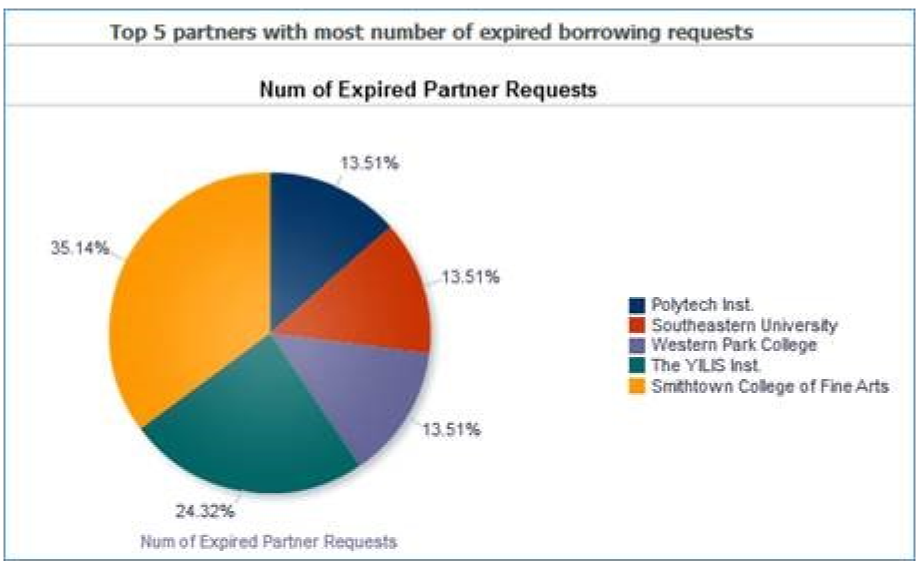
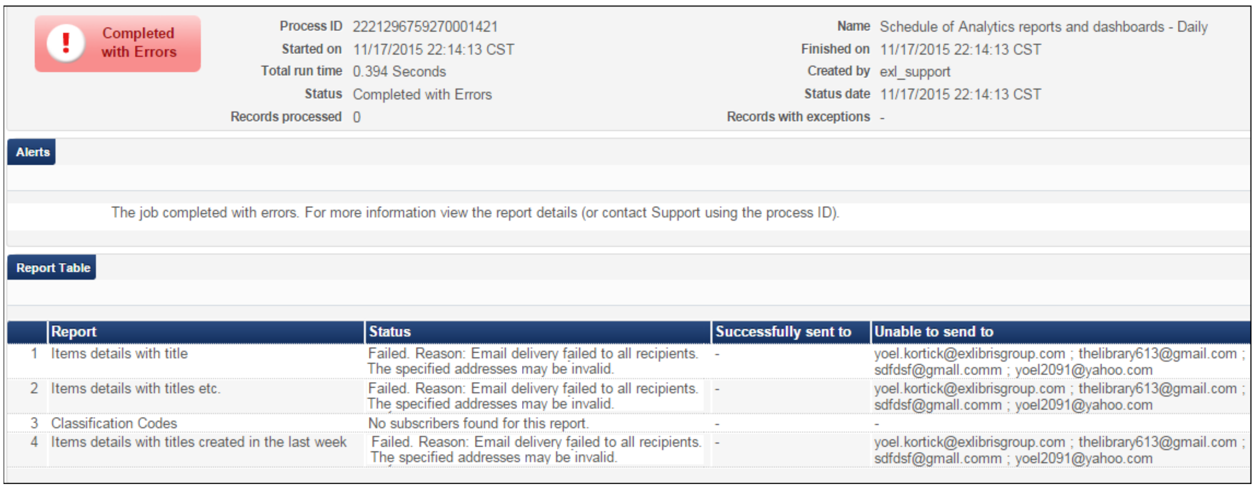


Figure 81 – Top 5 Partners with the Most Number of Expired Borrowing Requests

Other Analytics Enhancements

- The Link Resolver Usage subject area currently includes data from August 2015 through the current date. However, during December, the data will be enriched with additional historical data beginning January 01, 2015, which will enable you to discover trends in link resolver usage in a more conclusive manner. If you have reports that do not filter by date, additional data will appear in the reports.
- Analytics reports downloaded in Excel format now use the newer .xlsx format, instead of the older .xls format. If the file is too large, it is first compressed into a .zip file.
- The Analytics job report now includes the following enhancements:
  - The report is now in a table format to improve readability and includes an Alerts section and one row per report with a detailed status description.



	Report	Status	Successfully sent to	Unable to send to
1	Items details with title	Failed. Reason: Email delivery failed to all recipients. The specified addresses may be invalid.	-	yoel.kortick@exlibrisgroup.com ; thelibrary613@gmail.com ; sdfdsf@gmall.comm ; yoel2091@yahoo.com
2	Items details with titles etc.	Failed. Reason: Email delivery failed to all recipients. The specified addresses may be invalid.	-	yoel.kortick@exlibrisgroup.com ; thelibrary613@gmail.com ; sdfdsf@gmall.comm ; yoel2091@yahoo.com
3	Classification Codes	No subscribers found for this report.	-	-
4	Items details with titles created in the last week	Failed. Reason: Email delivery failed to all recipients. The specified addresses may be invalid.	-	yoel.kortick@exlibrisgroup.com ; thelibrary613@gmail.com ; sdfdsf@gmall.comm ; yoel2091@yahoo.com

Figure 82 - Analytics Job Report

  - The report or dashboard recipients, and whether the report or dashboard was or was not successfully sent to each recipient.

	Report	Status	Successfully sent to
1	Database Usage - Titles	Successfully delivered to 2 recipients (0 failed).	thelibrary613@gmail.com ; yoel.kortick@exlibrisgroup.com
2	Barcode Item ID MMS ID and Title in Excel	Successfully delivered to 2 recipients (0 failed).	thelibrary613@gmail.com ; yoel.kortick@exlibrisgroup.com

Figure 83 - Analytics Job Report, Successful Recipients Line

Figure 84 - Analytics Job Report, Failed Recipients Line

- If there is a report or dashboard to which no one is subscribed.

Figure 85 - Analytics Job Report, No Subscribers Line

- If the job tried to send a non-existent Analytics report or dashboard. This can happen if, after the report or dashboard was scheduled, someone changed the name or location of the report or dashboard source in Design Analytics.

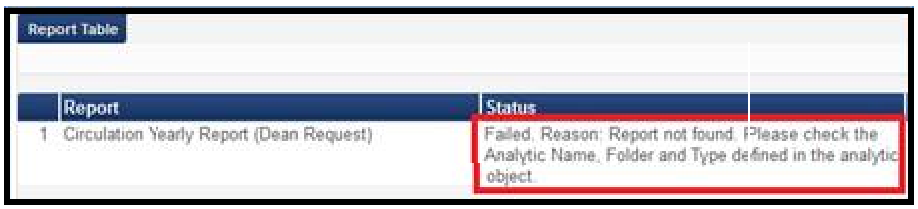


Figure 86 – Analytics Job Report, Non-Existent Report Line

- Several Alma Analytics fields were marked as **to be deprecated**, indicating that they were to be deprecated in the future and should not be used. They have now been deprecated and were removed from Alma Analytics.
    - In **Funds Expenditure > Transaction Date**, the following fields are deprecated because this information is included in the **Transaction** fields of the **Transaction Date** dimension:
        - Fiscal Full Quarter description and Key
        - Fiscal Quarter description and Key
        - Fiscal Full Month Key
        - Full Month Key
        - Full Quarter Key and Description
        - Quarter Key

- Year Key

- In **Fines and Fees > Fines and Fees Transactions**, the **Original Amount – Not sum** field is deprecated because this information is already available in the **Original Amount** measurement field.
- In **Users > Role**, the **Library ID** and **Library Name** fields are deprecated because this information is available in the **Scope** field.
- **Fulfilment > Owning Library** is deprecated because this information is available in **Fulfilment > Item Location**.
- In **Borrowing Requests > Borrowing Request Details** and **Lending Requests> Lending Request Details**:
  - The **Due Date** field is deprecated, because this information is available in the **Due Date** dimension.
  - The **Title** field is deprecated, because this his information is available in the **Bibliographic Details** dimension.
- In the Bibliographic Details shared dimension, the **type_of_record** field is deprecated because it already exists within existing fields, such as **Material Type**, **Resource Type**, C**ategory of Material**, and **Bibliographic Level**.

Alma Interface Updates

The following enhancements were made to the Alma user interface.

- In order to enhance the troubleshooting process, information about the last job that updated an item was added to the info icon pop-up menu:

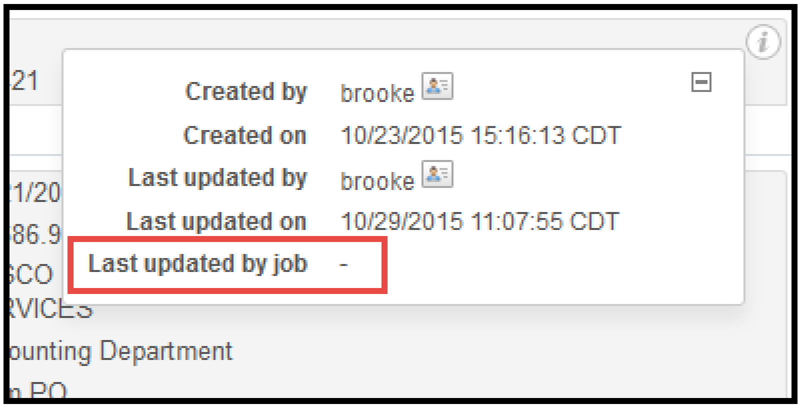


Figure 87: Info Icon Pop-up Menu

- All currencies in the UI and in exported Excel files, the total number of items in a search result, and the number of each item in a search result now appear with localized formatting, depending on your language (with commas, periods, and spaces in the appropriate locations). For example:

Figure 88 - Localized Currency

Alma APIs

For this release, the following API enhancements were made:

- An API to create a physical item:

  `POST /almaws/v1/bibs/{mms_id}/holdings/{holding_id}/items`

  For more information, see https://developers.exlibrisgroup.com/alma/apis/bibs
- The reading list APIs now support the Owner hierarchy attribute. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/courses.
- A `renewable` tag was added to the Get Loan API. This tag is `true` if the loan may be renewed and `false` if the loan is blocked due to user blocks or item blocks.
- Barcodes are now case-insensitive in the `scan-in` method of the Inventory API.
- The Get Library Open Hours API now also returns the days/dates on which the library is closed. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/conf.
- The Get Lending Requests API has four new fields: `created_time, last_modified_time, bib_note, copyright_status`. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/taskslists.
- The `locate_profile` (including `institution_code` and `holding_code`) was added to the Create Partner API. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/partners.
- The `copyrights_status` field was added to the citation object in the Courses APIs. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/courses.
- The Network Zone MMS ID was added to the `network_numbers` field in the Get Item API for records coming from a Network Zone. The Community Zone MMS ID was added to the `network_numbers` field in the Get Item API for records coming from the Community Zone.
- For requests with **personal delivery** (work or home address) as a pickup location, the API now returns either `USER_WORK_ADDRESS` or `USER_HOME_ADDRESS` in the `pickup_location_type` field, respectively.
- In the XML response from the SOAP service `GetLabelforPrinting`, Alma now takes the author from field 700 (subfield 4 = aut) if it is not present in field 100.

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 $a and 327 $b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 $a or the 327 $b.
- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge**, **Overlay**, or **Do not import** options instead.

Fixed Issues

The following previously known issue was fixed:

- MARC extensions cannot be loaded into authority profiles.

Data Services

The Alma November Central KnowledgeBase and Community Zone package was applied to the Alma environments.

Note: The classification system for subject indexing Regensburger Verbundklassifikation (RVK) was added to Alma. The vocabulary has more than 850,000 terms.

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone between the 1st of November and the 29th of November:

- BACON CAIRN Journals
- BACON Elsevier ScienceDirect Journals
- De Gruyter Journals Biology Chemistry Geosciences 2016
- De Gruyter Journals Classical Studies History 2016
- De Gruyter Journals Law 2016
- De Gruyter Journals Library And Information Science Library Reference 2016
- De Gruyter Journals Linguistics Literature 2016
- De Gruyter Journals Mathematics Physics Engineering 2016
- De Gruyter Journals Medicine 2016
- De Gruyter Journals Philosophy Theology Judaism Religion 2016
- De Gruyter Journals Politics Economics Sociology 2016
- EBSCOhost Academic Collection - World Wide
- Emerald 回溯数据库（国图订购）
- EZB: Cambridge Journals Digital Archive
- EZB: Elsevier
- EZB: ProQuest Periodicals Archive Online (PAO)
- EZB: Springer

- EZB: Wiley
- GNL Informa Healthcare Digital Archive
- HeinOnline Canada Supreme Court reports
- HeinOnline Early American Case Law
- HeinOnline Pentagon Papers
- HeinOnline State Reports: A historical archive
- HeinOnline Women and the Law (Peggy)
- Ovid Lippincott Williams and Wilkins Total Access Collection 2015
- Ovid Nursing Community College Extended Journal Collection
- ProQuest Hospital Collection New Platform
- Springer Link Books Behavioral Science 2016
- Springer Link Books Biomedical and Life Sciences 2016
- Springer Link Books Business and Economics 2016
- Springer Link Books Business and Economics German 2016
- Springer Link Books Chemistry and Material Science 2016
- Springer Link Books Earth and Environmental Science 2016
- Springer Link Books Energy 2016
- Springer Link Books Engineering 2016
- Springer Link Books Humanities and Social Sciences German 2016
- Springer Link Books Humanities Social Sciences and Law 2016
- Springer Link Books Lecture Notes In Physics 2016
- Springer Link Books Life Science and Basic Disciplines German 2016
- Springer Link Books Mathematics and Statistics Without Lecture Notes 2016
- Springer Link Books Medicine 2016
- Springer Link Books Medicine German 2016
- Springer Link Books Physics and Astronomy Without Lecture Notes 2016

- Springer Link Books Psychology German 2016
- Springer Link Books Springer protocols 2016
- SpringerLink FLVC Journals Collection
- 国家哲学社会科学学术期刊数据库 (NSSD)

New External Resources That Are Open for Searching

The following external resources were added for this release:

- Bibliothèque Nationale Suisse
- Bibliothèque On-line du Réseau de l'Académie Louvain
- BICOCCA (Università Milano Bicocca)
- Catalogo Italiano dei Periodici ACNP
- Catalogue Collectif Suisse des Affiches CCSA
- Charles University Praga
- IMF/World Bank
- Hellenic Academic Libraries
- Università degli Studi di Bergamo
- Università di Camerino
- Università di Genova
- Università di Padova
- Università di Sassari
- Università di Verona