



Alma March 2012 Release Notes

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About the Alma Release Notes

Alma release notes provide you with information regarding what you need to get up and running with the new features and enhancements in the latest Alma release.

These release notes include:

- [What's New in Alma March 2012](#)
- [Access to March 2012 Features](#)
- Feature/enhancement descriptions for the respective components
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [General](#)
- [Known Issues](#)





What's New in Alma March 2012

Many of the new features in the March release are related to internal functionality such as Oracle, JBoss, load balancers, and so forth.




A number of enhancements in the March release are related to ad-hoc reporting with the ability to define report output as widgets on the dashboard.

Access to March 2012 Features

Note: Refer to the Technical Instructions section for each feature in these release notes for information that describes the roles needed.

| Module / Feature | No Activation/ Setup Required | Activation/ Setup Required | Visible to Administrator Only | Contact Ex Libris to Activate This Feature |
|--|---|-------------------------------|-------------------------------------|---|
| | (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission) | | | |
| Acquisitions: Electronic Order Types and Order Actions/Database Entity Package Support Part 2 |  | | | |
| Acquisitions: Additional Bibliographic Criteria/Alerts for PO Line Rules |  | | | |
| Acquisitions: Create Invoices with Excel Spreadsheet |  | | | |
| Acquisitions: Database Order Type |  | | | |

| Module / Feature | No Activation/ Setup Required | Activation/ Setup Required | Visible to Administrator Only | Contact Ex Libris to Activate This Feature |
|---|---|-------------------------------|-------------------------------------|---|
| | (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission) | | | |
| Acquisitions: Link PO Line to Other PO Lines |  | | | |
| Acquisitions: Receiving/Activation Expected Date |  | | | |
| Resource Management: Institution-Level User Name/Password Access to Search Targets |  | | | |
| Resource Management: FTP Import |  | | | |
| Resource Management: Output of Licensed E- Resources to Primo Central |  | | | |
| Resource Management: Enhancements to More Info Pop-Up |  | | | |
| Resource Management: Exporting Metadata Records Part 2 |  | | | |
| Fulfillment: Document Delivery for E-Resources |  | | | |
| General: Custom Widgets |  | | | |
| General: Widget/Dashboard Type Configuration in Alma Analytics |  | | | |

| Module / Feature | No Activation/ Setup Required | Activation/ Setup Required | Visible to Administrator Only | Contact Ex Libris to Activate This Feature |
|---|---|-------------------------------|-------------------------------------|---|
| | (Note: Automatically Visible to All Users with the Appropriate User Role/ Permission) | | | |
| General: Show Locations |  | | | |
| General: FTP Include List Handling |  | | | |
| General: Update/Change Actions with Drools |  | | | |

Acquisitions

The following sections describe the functions provided for the Acquisitions component in the March 2012 release of Alma.

Electronic Order Types and Order Actions/Database Entity Package Support Part 2

Description

The purpose of this enhancement is to provide electronic order types and electronic order actions. Additional search support is also provided as a part of the database entity package support.

When ordering an electronic item such as an e-journal or an e-package Alma offers more purchase type options as part of the PO line creation.

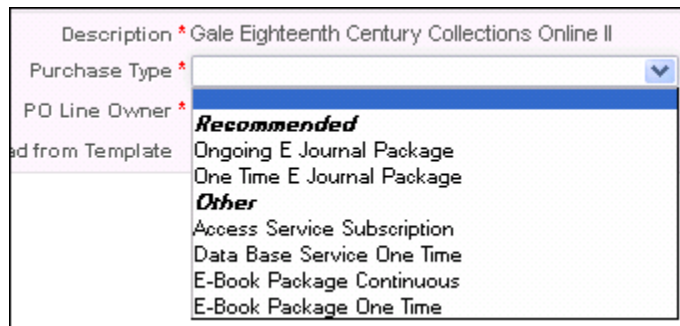
A screenshot of a software interface showing a dropdown menu for 'Purchase Type'. The menu is open, displaying a list of options. The first option is 'Recommended' in bold. Below it are 'Ongoing E Journal Package' and 'One Time E Journal Package'. Then 'Other' is in bold, followed by 'Access Service Subscription', 'Data Base Service One Time', 'E-Book Package Continuous', and 'E-Book Package One Time'. The background shows a form with fields for 'Description', 'Purchase Type', 'PO Line Owner', and 'ad from Template'. The 'Description' field contains 'Gale Eighteenth Century Collections Online II'.

Figure 1 - Purchase Order Type Options Expanded

For the single electronic journal order type:

- Portfolio-level orders in the CZ (Community Zone) create a package plus portfolio in the inventory
Additional portfolio orders under the same package are added to the same package in the institution. A new package is not created in the institution.
- Title-level orders in the CZ and the institution create a standalone journal in the inventory

Note: The Ejournal order type has changed to Electronic Journal.

For the standing order type, electronic resources have been added. Previously, this only existed for print orders.

The Order action has been added to electronic title search results. Previously, this has only been available from the portfolio drill down.

Note: The Order actions in the institution have been organized.

Related to this enhancement, the name of the prefilter option for searching the inventory has been changed from Electronic Packages to Electronic Collection in the regular and advanced repository search options. The relevant index name has been changed, too, from Package Name to Electronic Collection Name.

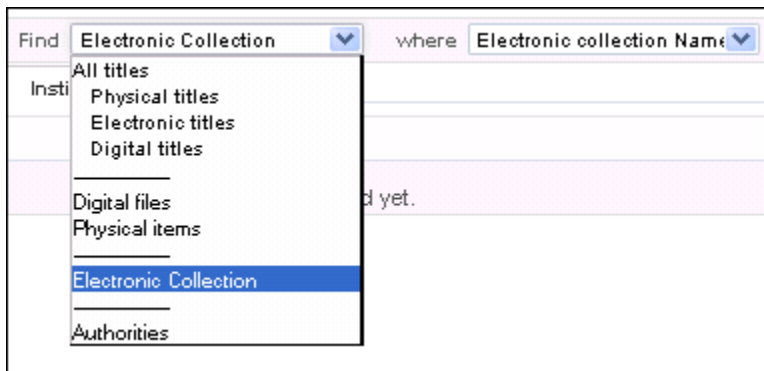


Figure 2 - Electronic Collection Prefilter

Technical Instructions

The following roles may use the electronic order types and order actions facility:

- Purchasing Operator
- Purchasing Manager

To view electronic order changes:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**
- 2 Search for an electronic title/item.

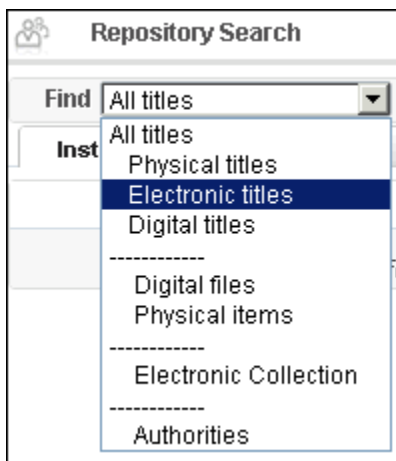


Figure 3 - Electronic Title Search

- 3 Click the Order link for the item of interest.
The PO Line Owner and Type page displays.
- 4 Display the drop-down list for Purchase Type.
- 5 View the electronic order types.

The screenshot shows a web form titled "PO Line Owner and Type". It contains a table with one row for "ABNF Journal". The table has columns for "Identifier", "Imprint", "Type", "Language", and "Availability". The "Purchase Type" dropdown menu is open, showing a list of options under "Recommended" and "Other".

| PO Line Owner and Type | | | | |
|------------------------|--------------------|--|--|--|
| 1 | ABNF Journal | Identifier: 1046-7041 | Imprint: Lisle, IL, Tucker Publications, | |
| | | Type: Journal | Language: English | |
| | | Availability: Electronic version at ProQuest CINAHL: Full Text | | |
| | Description * | ABNF Journal | | |
| | Purchase Type * | <div> <div>Recommended</div> <div> Electronic Journal One Time Electronic Journal Continuous Printed Journal Subscription Printed Journal One Time Microform </div> <div>Other</div> <div> Access Service Subscription Data Base Service One Time E-Book Continuous E-Book One Time Electronic Standing Order Manuscript Map Mixed Material Musical Score Physical Computer File Physical Computer File Subscription Printed Book </div> </div> | | |
| | PO Line Owner * | | | |
| | Load from Template | | | |

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Figure 4 - Electronic Orders

Additional Bibliographic Criteria/Alerts for PO Line Rules

Description

The purpose of this enhancement is to provide additional bibliographic criteria/new alerts for PO line rules.

As part of the Acquisitions configuration options in Alma, it is possible to define alerts on PO lines such as price limit reached; item already exists in the inventory, and so forth.

A new enhancement allows for defining alerts related to bibliographic information such as when there is a brief bibliographic record or when the PO line is for a series.

| Input Parameters | | |
|-------------------|----------|--|
| Name | Operator | Value |
| AssertionCode | = | * Previously canceled |
| AcquisitionMethod | = | * Any |
| VendorCode | = | Already Have Inventory |
| POLineType | = | Duplicated active orders |
| SourceType | = | * Electronic package already exist in the repository |
| | | Funds from different ledgers |
| | | * Invoicing Status |
| | | Items already exist in the repository |
| | | Mandatory information is missing or erroneous |
| | | Open claims exist for this po line |
| | | Overdue po line |
| | | Previously canceled ordered resource |
| | | Price Limit Reached |
| | | Purchase decision exists |
| | | Receiving Status |
| | | Reminder date is arrived |
| | | Renewal date past the subscription end date |
| | | The bib record is brief |
| | | The bib record is series/bookset |

| Output Parameters | |
|-------------------|--------|
| Name | Result |
| Result | * True |

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Figure 5 - Defining Alerts Related to Bibliographic Information

Technical Instructions

The Acquisitions Administrator role is required access and use this facility.

To view these rule options:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration, click **Configuration Menu**.
- 2 Click the Purchasing Review Rules link.
- 3 Add or edit a rule to display the Purchasing Review Rules page.
- 4 Display the drop-down Value list for AssertionCode for the following new criteria:
 - The bib record is brief
 - The bib record is series/bookset

Purchasing Review Rules

Purchasing Review Rule Editor

Name *
Description
Created By -
Updated By -

Created On 06/11/2012
Updated On 06/11/2012

Input Parameters

| Name | Operator | Value |
|-------------------|----------|-------|
| AssertionCode | = | * Any |
| AcquisitionMethod | = | * Any |
| VendorCode | = | * Any |
| POLineType | = | * Any |
| SourceType | = | * Any |

Output Parameters

| Name | Result |
|--------|--------|
| Result | * True |

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- Any
- Already Have Inventory
- Duplicated active orders
- Electronic package already exist in the repository
- Funds from different ledgers
- Invoicing Status
- Items already exist in the repository
- Mandatory information is missing or erroneous
- Open claims exist for this po line
- Overdue po line
- Previously canceled ordered resource
- Price Limit Reached
- Purchase decision exists
- Receiving Status
- Reminder date is arrived
- Renewal date past the subscription end date
- The bib record is brief**
- The bib record is series/bookset

Figure 6 - Value Drop-Down List of Options (for AssertionCode)

Create Invoices with Excel Spreadsheet

Description

The purpose of this enhancement is to provide the ability to create invoices with Excel spreadsheets containing the appropriate invoice details.

Technical Instructions

The following roles may create invoices with an Excel spreadsheet:

- Invoice Operator
- Invoice Manager

To access the facility for using an Excel spreadsheet:

- 1 From the Alma main menu > Acquisitions > Receiving and Invoicing, click **Create Invoice**.

The Select Invoice Creation Process page displays.



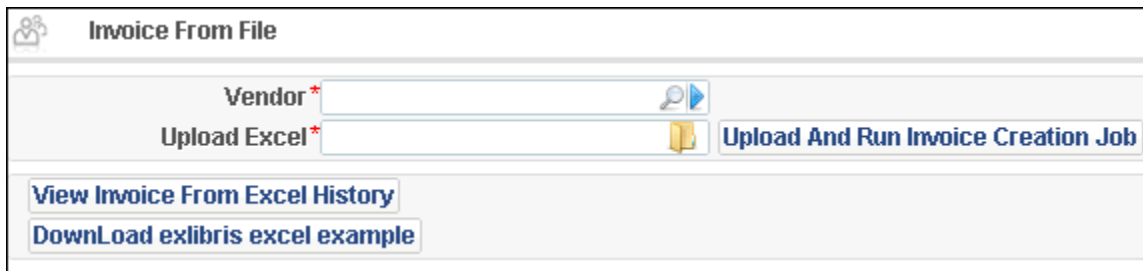
Select Invoice Creation Process

Invoice Creation ☒ Manually
☐ From PO
☐ From File


Handle ☐
 Receiving


Figure 7 - Select Invoice Creation Process Page

- 2 Select **From File** for the Invoice Creation option and click **Next**.
- 3 Provide the information required on the Invoice From File page for:
 - Vendor
 - Upload Excel (path/name of the spreadsheet)



Invoice From File

Vendor* 

Upload Excel*  **Upload And Run Invoice Creation Job**

[View Invoice From Excel History](#)

[Download exlibris excel example](#)

Figure 8 - Invoice From File Page

Optionally, click **Download Ex Libris Excel Example** and view the spreadsheet example to confirm that your spreadsheet follows the correct format.

| A | B | C | D | E | F | G |
|------|----------------|-------------|--------------|-------------------|----------------|--------------|
| HINV | Invoice Number | Date | Total amount | Currency | Vendor Account | Payment meth |
| INV | 1222 | 2/2/2012 | 200 | USD | | CASH |
| HIL | Line type | Line Number | PO Line | Vendor Ref Number | ISSN | ISBN |
| IL | REGULAR | | 1 | POL-099 | | |
| IL | SHIPMENT | | 2 | POL-887 | | |
| HINV | Invoice Number | Date | Total amount | Currency | Vendor Account | Payment meth |
| INV | 4455 | 2/2/2012 | 300 | USD | SwetAcc | Invoice |
| HIL | Line type | Line Number | PO Line | Vendor Ref Number | ISSN | ISBN |
| IL | REGULAR | | 1 | POL-0993 | | |
| IL | ADDITIONAL_CH | | 2 | POL-8875 | | |
| IL | OTHER | | 3 | POL-8876 | | |

Figure 9 - Ex Libris Invoice Example Spreadsheet

Note: You may copy the Ex Libris Excel example and use it as a template for entering your invoice data in Excel.

4 Click Upload and Run Invoice Creation Job.

When the file has been successfully loaded, staff receive an email notification.

Database Order Type

Description

The purpose of this enhancement is to provide the new order type (one time or continuous) of database wherever order types display in Alma. This is an extension to the database entity package part 1 (Create/Search Local Database) provided in the February release with a search service that allows the user to create an order for that resource.

Technical Instructions

The following roles may use the new purchase order type:

- Purchasing Operator
- Purchasing Manager

As a prerequisite, a local database needs to be added through Alma main menu > Resource Management > Inventory > Add Local DB.

To view an example of the new database order type:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Complete an institution or CZ search for an electronic collection.
- 3 Click the Order link for the package you want.

Repository Search

Find **Electronic Collection** where **Keywords** contains **journal** **Go**

Institution **Community**

Limit results to:

Type

[Selective package \(24\)](#)
[Aggregator package \(2\)](#)

Interface

[American Mathematical Society \(1\)](#)
[Astrophysics Data System \(1\)](#)
[Cambridge University Press \(4\)](#)
[More \(6\)](#)

1 **American Mathematical Society**
Services: Full Text (Active)
Creation Date: 2012-02-12 07:30:22 **Modification Date:** 2012-02-12 07:30:22
[Edit](#) | [Delete](#) | [View](#) | [Portfolio List \(22\)](#) | [Order](#) | [More info](#)

2 **history 1101121821 Community**
Type: Selective package **Services:** Full Text (Inactive)
Creation Date: 2012-01-11 09:22:38 **Modification Date:** 2012-01-11 09:22:38
[Edit](#) | [Delete](#) | [View](#) | [Portfolio List \(3\)](#) | [Order](#) | [More info](#)

Figure 10 - Order Link

- 4 Display the Purchase Type drop-down list to view the Database Service One Time order type.

PO Line Owner and Type

1 **American Mathematical Society**
Services: Full Text (Active)
Creation Date: 2012-02-12 07:30:22 **Modification Date:** 2012-02-12 07:30:22

Description* American Mathematical Society

Purchase Type* **PO Line Owner***

Load from Template

Recommended

- Ongoing E Journal Package
- One Time E Journal Package

Other

- Access Service Subscription
- Data Base Service One Time**
- E-Book Package Continuous
- E-Book Package One Time

Figure 11 - Database Service One Time Option

Link PO Line to Other PO Lines

Description

The purpose of this enhancement is to provide the capability to associate or link a PO line to other PO lines.

This new option allows for navigation between linked PO lines. PO lines are linked if they relate to the same bibliographic record or inventory resource.

You can also associate PO lines manually using the Associated PO line that exists in the Additional section of the PO line such as linking an electronic PO line to a print PO line for the same title.



Figure 12 - Associate/Link PO Line Manually

Technical Instructions

The following roles may use the linking facility for PO lines:

- Purchasing Operator
- Purchasing Manager

To view the PO line linking capability:

- 1 From the Alma main menu > Acquisitions > Purchase Order Lines, click **Review**.
- 2 Click the **Edit** link for the purchase order in which you are interested.
The PO Line Summary page displays.
- 3 Click the plus sign (+) to expand the Additional section on the PO Line Summary page.

The Associate PO Line option displays.



Figure 13 - Associated PO Line Option

- 4 Click the arrow for the **Associated PO Line** option to display the Select PO Line page.

From the Select PO Line page, you can select the PO line to link/associate to the original PO you are editing.

Additional

Associated PO Line

POL-150

Association Type

User defined relation

Source type

[Import EOD](#)
[Import Job Details](#)

Figure 14 - Associated PO Line with Linked PO Line

- Click the **Associated PO Line** tab to view the associated information.

ExLibris Alma

Tasks Analytics Currently at Main Library - Reading Room 1 Help User, Super

Associated PO Lines [Back to PO Line list](#)

Description 12012012_041837 Barnes & Noble Library of Essential Reading... Barnes & Noble... 2005_9780760765455 (Paperback), ISBN

Order Line -> POL-1510

Status In Review (2012-01-12)

Order line type Printed Journal Subscription

Ordering for Main Library

Summary

Description

Alerts

Invoice Lines

Associated PO Line

Communications

Notes

Attachments

Filter All 1 - 1 of 1 Records

| PO Line Number | Association Type | PO Line Type | PO Line Status | Description |
|----------------|-------------------|--------------|----------------|--|
| POL-1505 | Bibliographic MMS | Printed Book | In Review | 12012012_041837 Barnes & Noble Library of Essential Reading... [S.I.] ; Barnes & Noble... 2005_9780760765455 (Paperback), ISBN |

[Back to PO Line list](#)

Figure 15 - Associated PO Line Tab

Receiving/Activation Expected Date

Description

The purpose of this enhancement is to enable receiving and expected receiving date fields for the Physical Item Editor and activation and expected activation date fields in the Electronic Collection Editor.

Technical Instructions

The same roles that work with the Physical Item Editor and the Electronic Collection Editor can access these date fields on their respective pages.

To view an example of these date fields on the Physical Item Editor page:

- From the Alma main menu > Acquisitions > Post-Receiving Processing, click **Receiving Department Items**.
- Click **Actions > Edit Inventory Item**.

The Physical Item Editor page displays

Physical Item Editor
Department

Resource description [Journal of biomedicine.](#)

Holding [Main Library: General;](#) [View all holdings](#)
Barcode - [View all items](#)
Process type Managed by Department

Summary
General Information
Serials Subscription Information
Notes
Reports and Services

Barcode

Material type ISSUE (not listed)

Enumeration A v.1, no.1

Inventory date

PO line POL-2601

Receiving date

Copy ID

Override policy

Enumeration B

Provenance Provenance Test 1

Is Magnetic

Expected receiving date

Location Information

Permanent Location Information:
Permanent library* Main Library **Permanent location*** General
Alternative call number

Figure 16 - Physical Item Editor Page

The Receiving date and Expected receiving date fields display in the General Information tab of the Physical Item Editor page.

To view an example of these date fields on the Electronic Collection Editor page:

- 1 From the Alma main menu > Resource Management > Inventory, click **Add Local Package**.
- 2 Enter the Public name and click Save and Continue.

The Electronic Collection Editor page displays.

Electronic Collection Editor
Department

Local package created successfully

Electronic Collection Example Electronic Collection
 name

Electronic Collection Description
 General Information
 Additional Information
 Notes

Summary and Inventory Information

Electronic Collection type Selective package

Interface Name

Process type -

Access rights

Created by admin1 (09/03/2012)

Updated by admin1 (09/03/2012)

Services -

Acquisitions and License Information

PO Line

Activation date

Active license

PO line details -

Expected activation date

View license details -

Figure 17 - Electronic Collection Editor Page

The Activation date and Expected activation date fields display in the General Information tab of the Electronic Collection Editor page.

Resource Management

The following sections describe the functions provided for the Resource Management component in the March 2012 release of Alma.

Institution-Level User Name/Password Access to Search Targets

Description

The purpose of this enhancement is to provide the ability to search targets such as OCLC WorldCat and Z39.50 with an institution-level user name and password.

Technical Instructions

The Catalog Administrator role is required to configure this feature.

Prior to entering the user name and password authentication information in Alma, the target needs to be added/configured in MetaLib (refer to MetaLib support/documentation).

To enter an institution-level user name and password for search targets:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.

The Configuration page displays.

Configuration

You are configuring: Main Campus

Resource Management Configuration

Search Configuration

- [Search Indexes](#)
- [Customize Indexes Labels](#)
- [External Search Resources](#)
- [External Search Profile](#)

Cataloging

- [Metadata Configuration](#)
- [Controlled Vocabulary Registry](#)

Record Export

- [Export Profiles](#)

Record Import

- [Import Profiles](#)
- [Match Profiles](#)
- [Merge Profiles](#)
- [MARC Normalization Rules](#)
- [Originating Sys](#)

General

- [Other Settings](#)
- [Processes](#)
- [Provenance Code](#)
- [Accession Number](#)

Figure 18 - Configuration Page

- From the Search Configuration section, click **External Search Resources**.

The Search External Resource Setup page displays.

Search External Resource Setup

External Resource List

Find : in : Resource Name

[Add External Resource](#) 1 - 7 of 7 Records

| Resource Name | Actions |
|---|-------------------------|
| ALEPH migration server | Actions |
| ALEPH Z39 TEMPLATE | Actions |
| British Library Public Catalog | Actions |
| Ex Libris University | Actions |
| Internal Aleph Configuration for Hosted Services Monitoring | Actions |
| Library of Congress (United States Library of Congress (LOC)) | Actions |
| WorldCat for Demo purposes (OCLC) | Actions |

Figure 19 - Search External Resource Setup Page

- Click **Actions > Edit**. for the target resource that requires the institution user name and password for authentication.
- In the Institution Details section, enter the **User name** and **Password** and click **Save**.

Figure 20 - Institution Credentials

FTP Import

Description

The purpose of this enhancement is to provide the following FTP import capabilities:

- Enable the import profile to be activated for files stored in a remote FTP location
- Enable the scheduling of FTP import jobs to run at regular, preset intervals or on a per-request basis
- Enable the setting of FTP parameters on the same form as the import profile
- Enable the ability to test the FTP connection at setup

Technical Instructions

The Catalog Administrator role is needed to configure the FTP import capability:

To configure the FTP import capabilities:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.

The Configuration page displays.

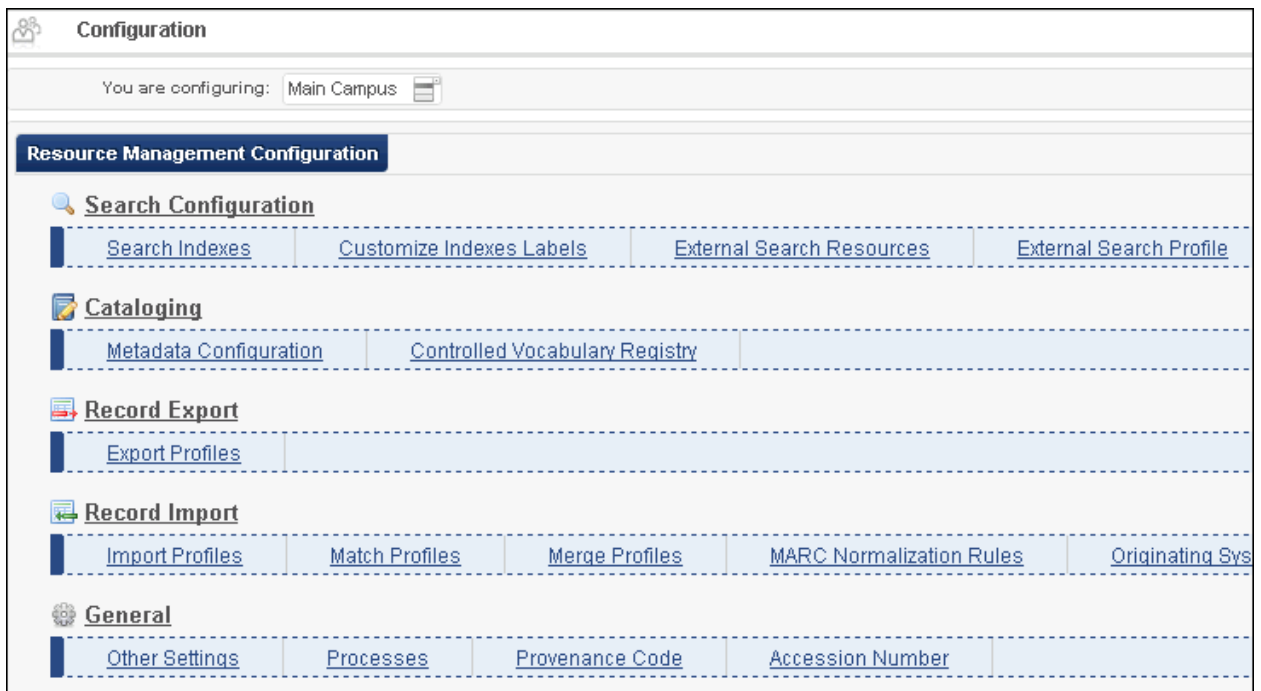


Figure 21 - Configuration Page

- 2 From the Record Import section, click the **Import Profiles** link.

The Run Import page displays.

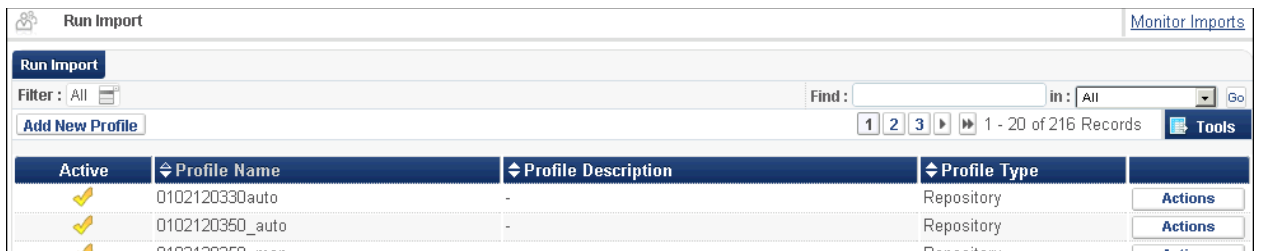
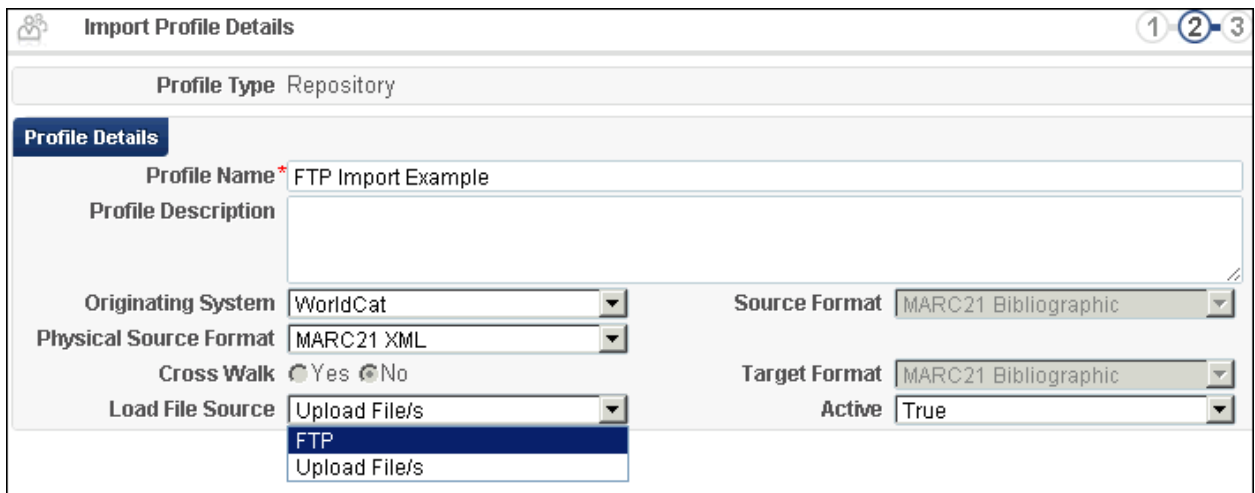


Figure 22 - Run Import Page

- 3 Click **Add New Profile** (or edit an existing profile).
- 4 Select the profile type and click **Next**.
The Import Profile Details page displays.
- 5 Enter the profile details and select **FTP** for the Load File Source.



Import Profile Details 1 2 3

Profile Type Repository

Profile Details

Profile Name* FTP Import Example

Profile Description

Originating System WorldCat

Physical Source Format MARC21 XML

Cross Walk ☐ Yes ☒ No

Load File Source Upload File/s FTP Upload File/s

Source Format MARC21 Bibliographic

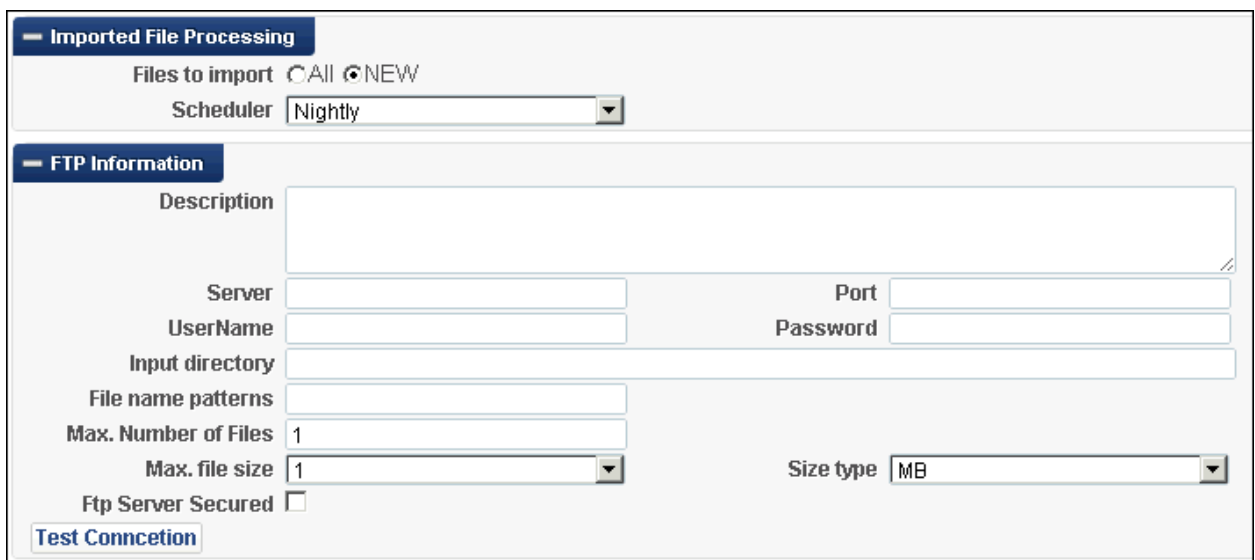
Target Format MARC21 Bibliographic

Active True

Figure 23 - FTP Load File Source Option

The Imported File Processing and FTP Information sections display.

Choosing the FTP option opens an additional section on the Profile details tab for entering relevant details related to the FTP process.



Imported File Processing

Files to import ☐ All ☒ NEW

Scheduler Nightly

FTP Information

Description

Server

Port

Username

Password

Input directory

File name patterns

Max. Number of Files 1

Max. file size 1

Size type MB

Ftp Server Secured ☐

Test Connction

Figure 24 - FTP Profile Settings

- 6 Enter your FTP import information and, optionally, test the connection.

Use the Input directory field to specify where the files are located and select the FTP Server Secured option to set the file transfer method to SFTP.

- 7 Continue clicking **Next** to complete the remainder of the import profile pages and **Save** when you are finished.

Output of Licensed E-Resources to Primo Central

Description

The purpose of this enhancement is to provide e-resource availability to Primo Central. Additional targets such as Google Scholar will be available with future releases.

Technical Instructions

The following roles may use this facility:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To view an example of using this facility:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the Record Export section, click **Export Profiles**.

The Publishing Profiles page displays.

- 3 Click the check mark in the Active column to publish electronic records to Primo Central.



| Active | name | Description | Last Run | |
|-------------------------------------|---|---|------------|---------|
| <input checked="" type="checkbox"/> | Publish bib records to Primo | Setup the parameters for publishing bibliographic records to Primo - this is a test | 11/03/2012 | Actions |
| <input checked="" type="checkbox"/> | Publish electronic records to Primo Central | Publish electronic records to Primo Central | - | Actions |

Figure 25 - Publishing Profiles Page

- 4 To run the publishing profile to publish electronic records to Primo Central, click **Actions > Run**.

Enhancements to More Info Pop-Up

Description

The purpose of this enhancement is to provide a link to related records for a given title, physical item, or portfolio result through the More Info pop-up window. This is a continuation of the More Info function described in the February release.

The related record link is created from 76X-78X fields in the metadata record as part of the standard MARC21 linking mechanism.

For example, see the following record that has a 770 linking field.

| | | | |
|-----|----|---|--|
| 245 | 00 | a | Journal of banking & finance. |
| 246 | 00 | a | Journal of banking and finance |
| 260 | __ | a | [Amsterdam, : b North-Holland Pub. Co.]. |
| 300 | __ | a | v. ; c 24 cm. |
| 310 | __ | a | 8 no. a year, b 1995- |
| 321 | __ | a | Quarterly |
| 321 | __ | a | 6 no. a year, b <1991-> |
| 362 | 0_ | a | v. 1- June 1977- |
| 510 | 1_ | a | ABI/INFORM b March 1981 |
| 510 | 1_ | a | Business periodicals index x 0007-6961 |
| 510 | 1_ | a | Index of economic articles in journals and collective volumes x 0536-647X |
| 510 | 1_ | a | Journal of economic literature x 0022-0515 b 1983- |
| 510 | 1_ | a | Management contents b 1977- |
| 510 | 2_ | a | Public Affairs Information Service bulletin x 0033-3409 |
| 650 | _0 | a | Financial institutions x Periodicals. 2 [LC] |
| 650 | _0 | a | Finance x Periodicals. 2 [LC] |
| 650 | _0 | a | Banks and banking x Periodicals. 2 [LC] |
| 770 | 0_ | t | Studies in banking & finance w (DLC)sn 85022215 w (OCoLC)12629758 |

Figure 26 - 770 Linking Field Example

As a result, in the repository search display of this record, the More Info pop-up window displays the Related Records link.

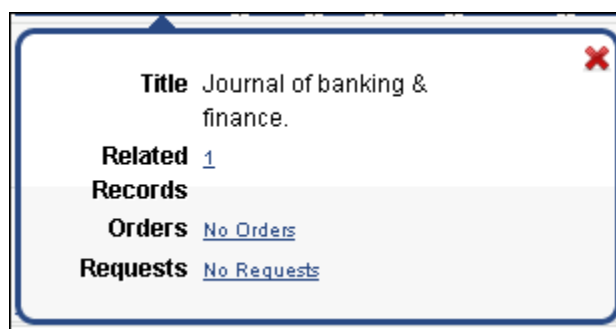


Figure 27 - More Info with Related Records Link

Technical Instructions

Any role that can process a Repository Search may view the More Info pop-up window information provided.

To view an example of the enhancements to the More Info pop-up window:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Enter search criteria for a title with related record information.
The Repository Search page displays.
- 3 Click the **More Info** link for the row/title with related record information.
The More Info pop-up window displays.
- 4 Click the hyperlinked number for Related Records to view the related record information.

Exporting Metadata Records Part 2

Description

The purpose of this enhancement is to provide additional support for exporting a set of metadata records.

This function allows you to export a set of records and download them to your PC or a specified FTP site. This can be done by utilizing the Set Management and Run Processes options from the Alma main menu.



Figure 28 - Manage Sets



Figure 29 - Run Processes

The process is similar to the one described in the February release notes (for exporting physical item information) with the additional option of being able to define an FTP destination.

Technical Instructions

The following roles may use this facility:

- Physical Inventory Operator
- Cataloger
- Repository Administrator
- General Systems Administrator

Prior to running the export process (using FTP support):

- Create and save a set
- Configure FTP by using the S/FTP definitions link in the External Systems section of the Configuration page that you access from Alma main menu > General > General Configuration > Configuration Menu

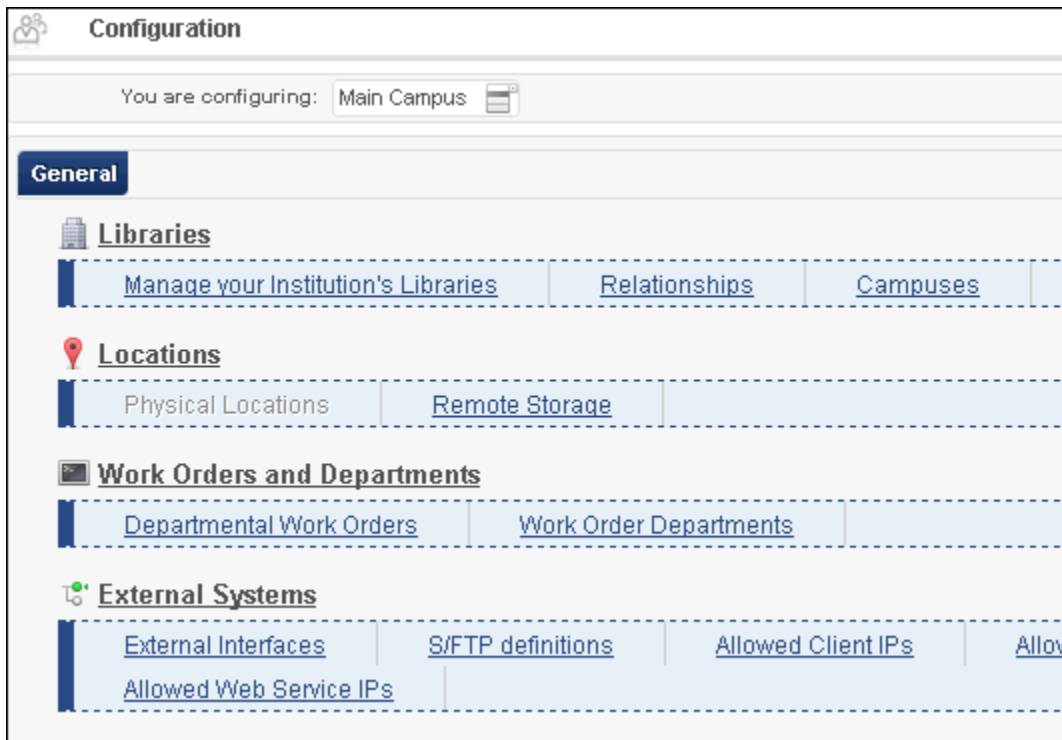


Figure 30 – S/FTP Definitions Link

To export to an FTP site:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 Select the **Export Physical Items** process and click **Next**.
- 3 Select a set and click **Next**.

- Specify the task parameters for exporting physical items to include the FTP configuration that you select from the drop-down list and click **Next**.

| Task Parameters: Export Bibliographic Records | |
|---|---|
| Output Format | MARC21 XML |
| Bibliographic record formats to include | MARC21 Bibliographic |
| Number of records in file | One File |
| Export into folder | Private |
| FTP configuration | |
| Sub-directory | EXCHANGE_RATES ftp1 SISSubmission INST02 |

Figure 31 - FTP Configuration

- Specify a process name (required) for your export request, select your scheduling preference from the list of available scheduling choices, and click **Next**.
- Verify the export process information that you created/selected and click **Save**.

Fulfillment

The following section describes the function provided for the Fulfillment component in the March 2012 release of Alma

Document Delivery for E-Resources

Description

The purpose of this enhancement is to provide document delivery for e-resources.

Based on the library-defined parameters, the e-resource can be downloaded for printing or scanning.

Technical Instructions

The following roles may use/configure the e-resources delivery function facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view the e-resources delivery function:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Complete a search for an electronic title or electronic collection.

In the results list, the Document Delivery link displays.

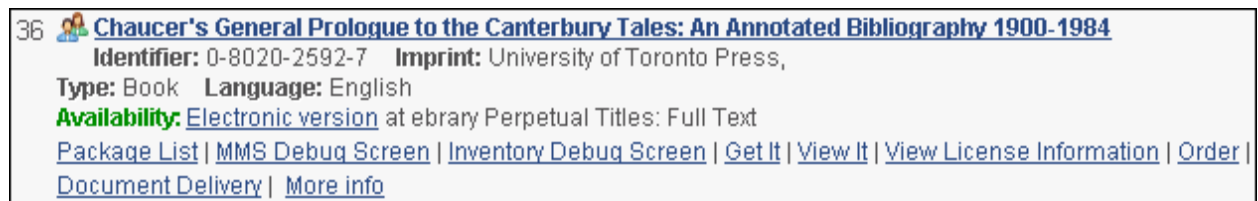


Figure 32 - Document Delivery Link

- 3 Click the **Document Delivery** link for the item in which you are interested.
The Create Request page displays for document delivery.

Create Request

Title: Chaucer's General Prologue to the Canterbury Tales: An Annotated Bibliography 1900-

Institution: Main Campus

Request Type: Patron electronic digitization request

Requester: [empty]

Part to Digitize: [empty]

Target Destination: [empty]

Additional Request Attributes

Partial Digitization: true

Add Request Attributes

Date Needed By: [empty] Refresh Values Add Request Attribute

Figure 33 - Document Delivery Create Request Page

- 4 Complete the information for your document delivery request on the Create Request page and click **Submit**.
- 5 The request is now listed as a digitization request in the digitization department's list of requests.

Items in Department

Items in Local Department

Step: All Request Type: All

| Title | Requester | Status | Request Type | Notes | Receive Date | End of Activity | Actions |
|--|-------------------|-------------------|--------------|-------------|--------------|-----------------|--|
| A Kalman Filter Primer | User, Super | Document Delivery | Partial | Pages 34-78 | 14/03/2012 | 17/03/2012 | Actions |
| A Vertical Empire | User, Super | Document Delivery | Partial | pages 54-99 | 14/03/2012 | 17/03/2012 | Actions |
| Population geography: a reader | User, Super | Document Delivery | Partial | 3rd article | 14/03/2012 | 17/03/2012 | Actions |
| Public management in the new democracy, | Tester, Automatic | Document Delivery | Full | - | 12/10/2011 | 15/10/2011 | Edit |
| Книга, библиотека, актуальные задачи (Библиографование произведений К. Маркса, Ф. Энгельса, В.И. Ленина и лит. о них в условиях перестройки) | User, Super | Deposit | Full | - | 17/11/2011 | 20/11/2011 | Attach Documents Cancel Request View License |

Figure 34 - Items in Department Page (Digitization Requests)

To configure the e-resources delivery function:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.

The Configuration page displays.

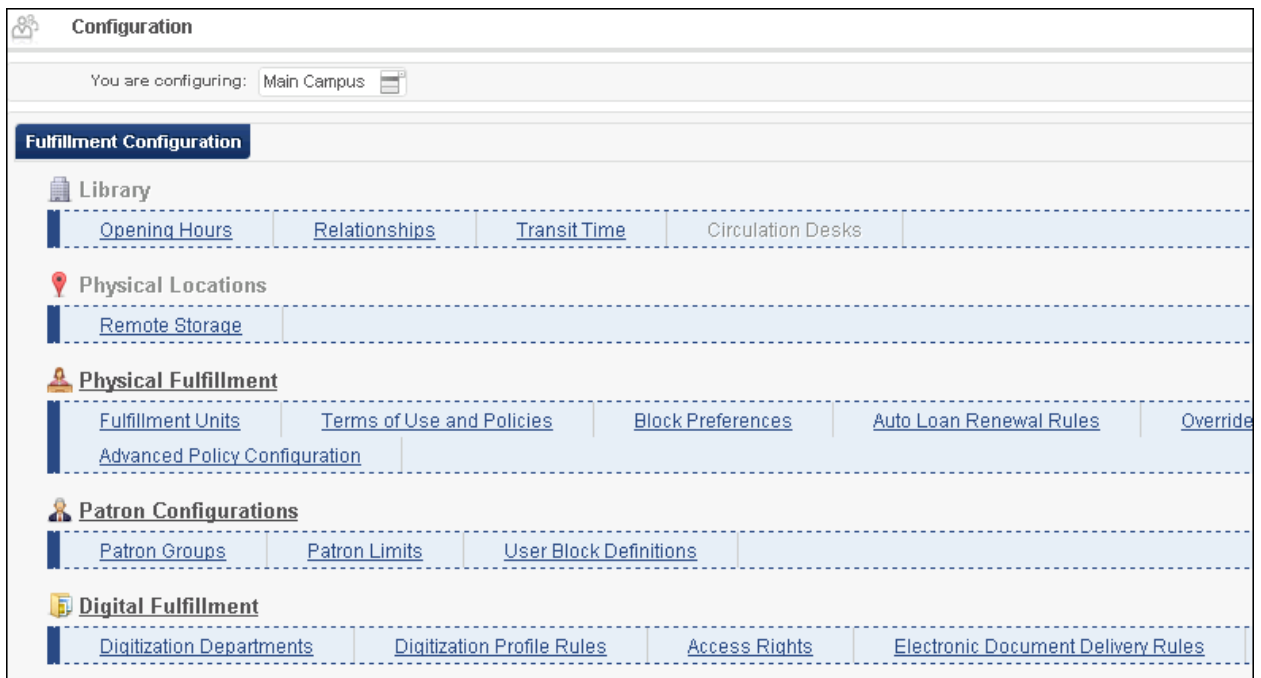


Figure 35 - Configuration Page

- From the Digital Fulfillment section, click **Electronic Document Delivery Rules**.

The Electronic Document Delivery Rules List page displays.

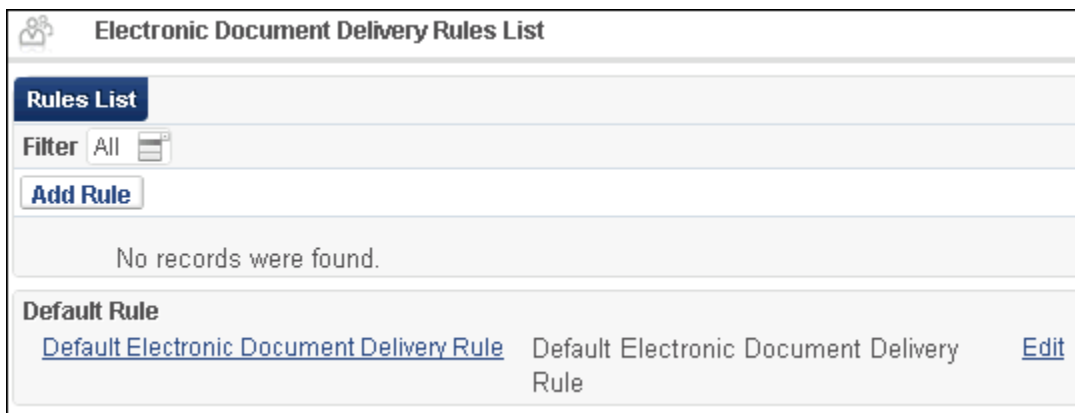



Figure 36 - Electronic Documentation Delivery Rules List Page

- Click **Add Rule**, complete the information on the Electronic Document Delivery Rules Editor page for the new electronic document delivery rule, and click **Save**.


Electronic Document Delivery Rules Editor

Electronic Document Delivery Rules Editor

Name *

Description

Created By -

Updated By -

Created On 07/03/2012

Updated On 07/03/2012

Input Parameters

No records were found.

| Name | Operator | Value |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Possible Values >

Add Parameter

Output Parameters

| Name | Result |
|-----------|---------|
| IsAllowed | * False |

Figure 37 - Electronic Document Delivery Rules Editor Page

General

The following sections describe the functions provided for the General component in the March 2012 release of Alma

Custom Widgets

Description

The purpose of this enhancement is to provide the facility to add custom widgets (in addition to the Alma system-provided widgets).

Technical Instructions

The General System Administrator role may configure custom widgets.

To configure custom widgets:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the General Configuration section, click Customize Widgets.

The Customize Widgets page displays.

Customize Widgets Cancel Save

You are configuring: Main Campus [Organization Unit List](#)

Table Information

Sub System: Infra Table Name: InstitutionWidgets
Updated By: admin1 Last Updated: 12/03/2012
Table Description: Institution's Widgets

Mapping Table Rows Tools

| Widget key | Widget name | Privileges | URL | Description | Last Updated | |
|-----------------|-------------------|------------|---------------------------|--------------------|--------------|--------|
| ILANA | ILANA | | url=http://www.ynet.co.il | Ilana sholetetetet | 12/03/2012 | Delete |
| PACMAN | Pacman | | url=http://www.sababagai | Game try | 12/03/2012 | Delete |
| NewCustomWidget | New Custom Widget | | url=url=www.unixxx.edu/ | Test widget | 12/03/2012 | Delete |

Create a New Mapping Row

Widget key: Widget name:
Privileges: URL:
Description:

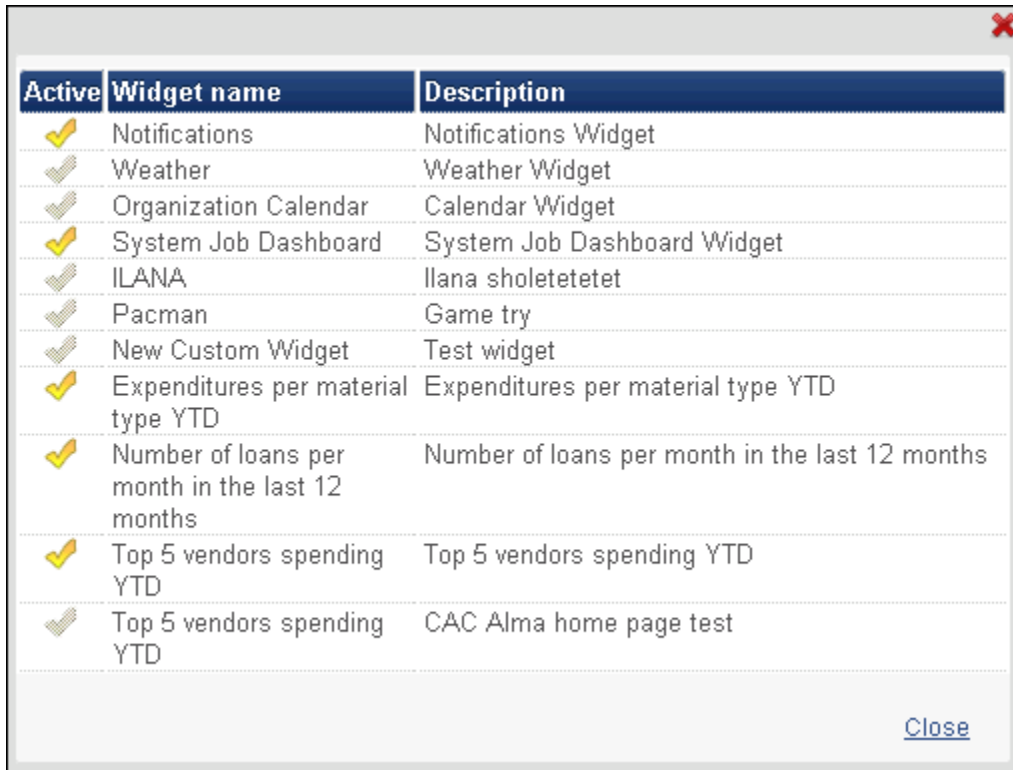
Add Row Cancel Save

Figure 38 - Customize Widgets Page

- 3 Enter the information for your custom widget in the Create a New Mapping Row section and click **Add Row**.

- 4 When you are finished adding the new custom widget information (mapping rows), click **Save**.

The new custom widget is available to select from the Add Widget pop-up list from the Alma home page.



The screenshot shows a pop-up window titled 'Add Widget Pop-Up Window' with a red close button in the top right corner. Inside the window is a table with three columns: 'Active', 'Widget name', and 'Description'. The 'Active' column contains checkmarks (yellow for active, grey for inactive). The table lists various widgets, including 'Notifications', 'Weather', 'Organization Calendar', 'System Job Dashboard', 'ILANA', 'Pacman', 'New Custom Widget', 'Expenditures per material type YTD', 'Number of loans per month in the last 12 months', 'Top 5 vendors spending YTD', and 'Top 5 vendors spending YTD' (with a different description). A 'Close' button is located at the bottom right of the window.

| Active | Widget name | Description |
|-------------------------------------|---|---|
| <input checked="" type="checkbox"/> | Notifications | Notifications Widget |
| <input type="checkbox"/> | Weather | Weather Widget |
| <input type="checkbox"/> | Organization Calendar | Calendar Widget |
| <input checked="" type="checkbox"/> | System Job Dashboard | System Job Dashboard Widget |
| <input type="checkbox"/> | ILANA | Ilana sholetetetet |
| <input type="checkbox"/> | Pacman | Game try |
| <input type="checkbox"/> | New Custom Widget | Test widget |
| <input checked="" type="checkbox"/> | Expenditures per material type YTD | Expenditures per material type YTD |
| <input checked="" type="checkbox"/> | Number of loans per month in the last 12 months | Number of loans per month in the last 12 months |
| <input checked="" type="checkbox"/> | Top 5 vendors spending YTD | Top 5 vendors spending YTD |
| <input type="checkbox"/> | Top 5 vendors spending YTD | CAC Alma home page test |

Figure 39 - Add Widget Pop-Up Window

Note: The widget pop-up list has been redesigned with a new Active column and clicking the check mark activates/deactivates the widget on the Alma dashboard.

Widget/Dashboard Type Configuration in Alma Analytics

Description

The purpose of this enhancement is to enable the configuration of widget/dashboard types within Alma Analytics that can subsequently be exposed/activated on the Alma home page.

With OBI (Oracle Business Intelligence), reports can now be added as widgets to the widget list and, subsequently, displayed on the Alma dashboard.

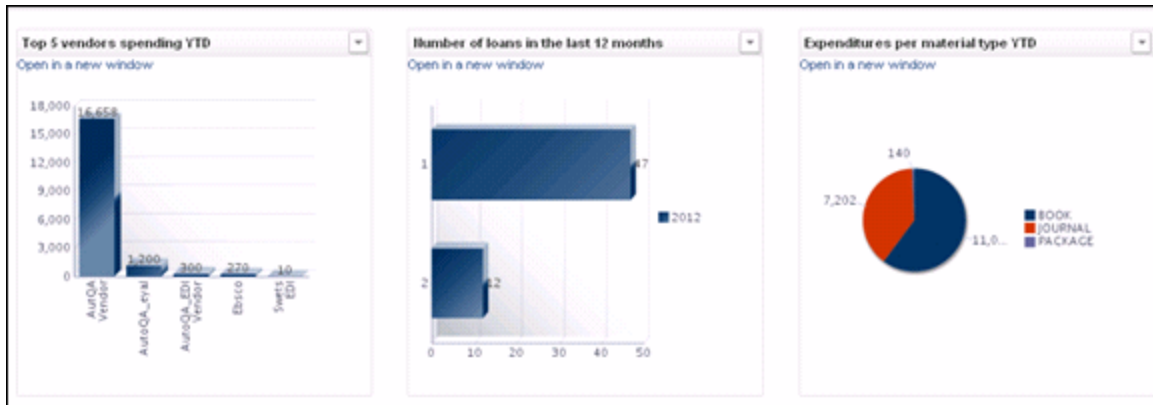


Figure 40 - Alma Analytics Reports on the Alma Dashboard

Technical Instructions

The Design Analytics role is needed for configuring widget types in Alma Analytics.

Prior to configuring widget types, to expose them to the Alma home page, you need to create the content/report through the Alma main menu > General > Analytics > Design Analytics facility.

The following new reports have been created:

- Cataloging activity report
- User fines and fees

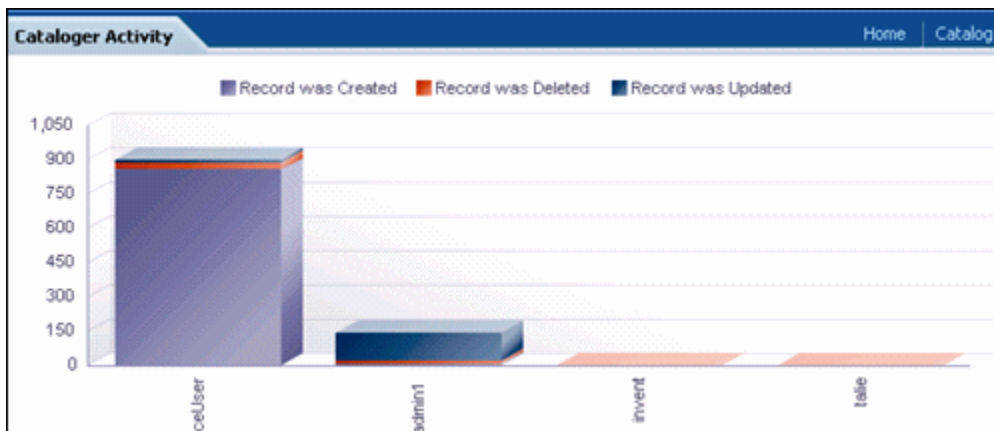


Figure 41 - Alma Analytics Cataloging Activity Report

To configure widget types in Alma Analytics:

- 1 From the Alma main menu > General > Analytics, click **Configuration Menu**.

The Alma Analytics Configuration page displays.

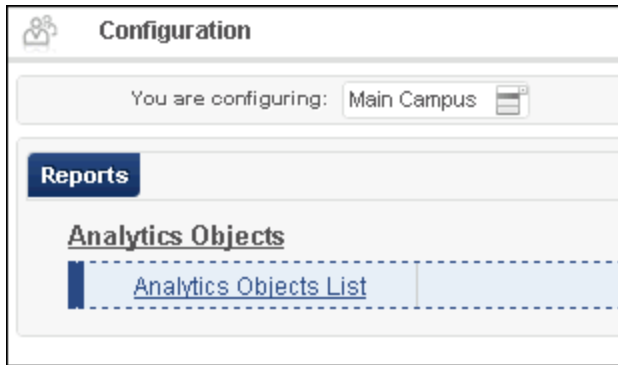


Figure 42 - Alma Analytics Configuration Page

- 2 Click the **Analytics Objects List** link.

The Mapping Table page displays.

| Enabled | Key | OBI Object Name | OBI Object Title | Type | Location (path) | Role | Description |
|---------|---------|--------------------|--------------------|-----------|-----------------|------------|-------------|
| ✓ | REPORT1 | Fulfillment Dashbo | Fulfillment Dashbo | Dashboard | Alma/Fulfillme | Fulfillmer | |
| ✓ | 12345 | Acquisitions Dashl | Acquisitions Dashl | Dashboard | Alma/Acquisi | Acquisiti | |
| ✓ | WIDGET3 | Expenditures per r | Expenditures per r | Widget | Alma/Acquisi | Acquisiti | Expenditu |
| ✓ | WIDGET4 | Number of loans pi | Number of loans pi | Widget | Alma/Fulfillme | Fulfillmer | Number of |
| ✓ | WIDGET5 | Top 5 vendors spe | Top 5 vendors spe | Widget | Alma/Acquisi | Acquisiti | Top 5 vend |

Create a New Mapping Row

Key:

OBI Object Name:

OBI Object Title:

Location (path):

Role:

Type:

Description:

Add Row

Figure 43 - Alma Analytics Mapping Table Page

- 3 Enter the information to create a new mapping row and select Widget from the Type drop-down list.

Create a New Mapping Row

Key

Widget99

OBI Object Title

Top 5 vendors spending YTD

Location (path)

Alma/Fulfillment/Reports

Description

Top 5 vendors spending YTD

Add Row

OBI Object Name

Top 5 vendors spending YTD

Type

Dashboard

Role

Dashboard

Report

Widget

Figure 44 - Widget Type

4 Click Add Row and Save.

The new widget can be viewed from the Alma home page using the Add Widget button to open the pop-up window.

| Active | Widget name | Description |
|--------|---|---|
| | Notifications | Notifications Widget |
| | Weather | Weather Widget |
| | Organization Calendar | Calendar Widget |
| | System Job Dashboard | System Job Dashboard Widget |
| | Expenditures per material type YTD | Expenditures per material type YTD |
| | Number of loans per month in the last 12 months | Number of loans per month in the last 12 months |
| | Top 5 vendors spending YTD | Top 5 vendors spending YTD |

Figure 45 - Add Widget Pop-up Window

Show Locations

Description

The purpose of this enhancement is to provide the data extract that pulls data such as MMS ID, library, call number, and so forth needed to render a map with instructions regarding an item's location.

This supports the option of integrating a map app in Primo (as part of the Get It services) that gives the patron details about where the requested item is located in the library.

Technical Instructions

Any user with the appropriate access to your discovery interface may use the Show Locations feature.

The General System Administrator role in Alma is required to set up the integration profile and a URL for the Locate link that needs to be defined.

To view the Show Locations feature in Primo:

- 1 From the Primo user interface, complete a search for an item.

The search results page displays.

Show only [Available in the Library](#) (24)





| | |
|---|--|
|  Video | ☆ Harry Potter and the half-blood prince Burbank, CA : Distributed by Warner Home Video c2009 Checked out from O'Neill Media Center Stacks (PR6068 .O93P685 2009) Get It Details Reviews & Tags |
|  Book | ☆ Critical perspectives on Harry Potter New York : Routledge 2009 Available at O'Neill Open Stacks located in the main building (PR6068 .O93Z73 2009) Get It Details Reviews & Tags |
|  Book | ☆ Harry Potter and the prisoner of Azkaban J. K. Rowling New York : Arthur A. Levine Books 1999 Available at Educational Resource Center Stacks (PZ7 .R79835Ham 1999) Get It Details Reviews & Tags |
|  Book | ☆ Harry Potter and the chamber of secrets J. K. Rowling New York : Arthur A. Levine Books 1999 Available at Educational Resource Center Stacks (PZ7 .R79835Haj 1999) Get It Details Reviews & Tags |

Figure 46 - Primo Search Results

- 2 Click **Get It**.

The Get It tab displays.

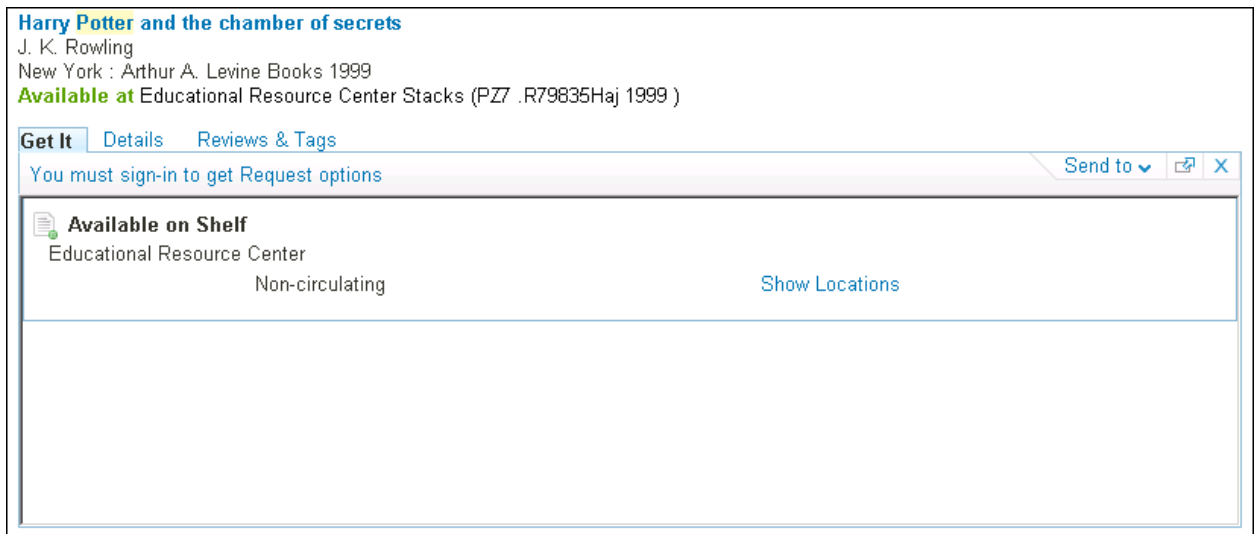


Figure 47 - Get It Tab

3 Click **Show Locations**.

The Show Locations results display.

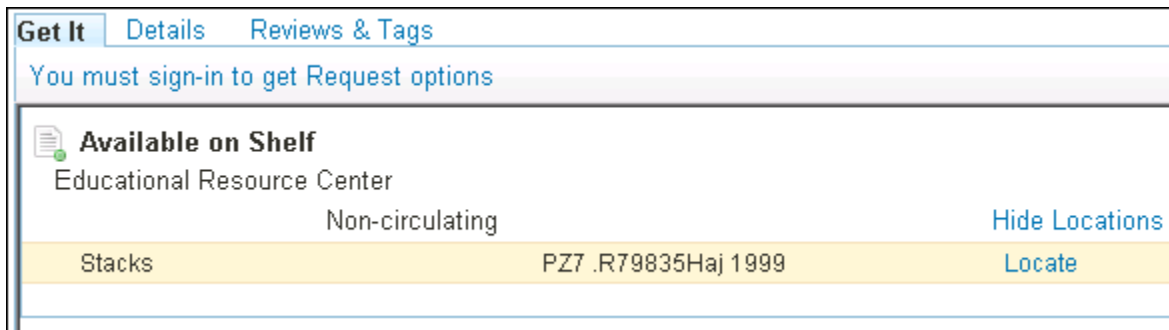


Figure 48 - Show Locations Results

4 Click **Locate** to render a map with instructions.

To configure Alma for Show Locations:

1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.

The Configuration page displays.

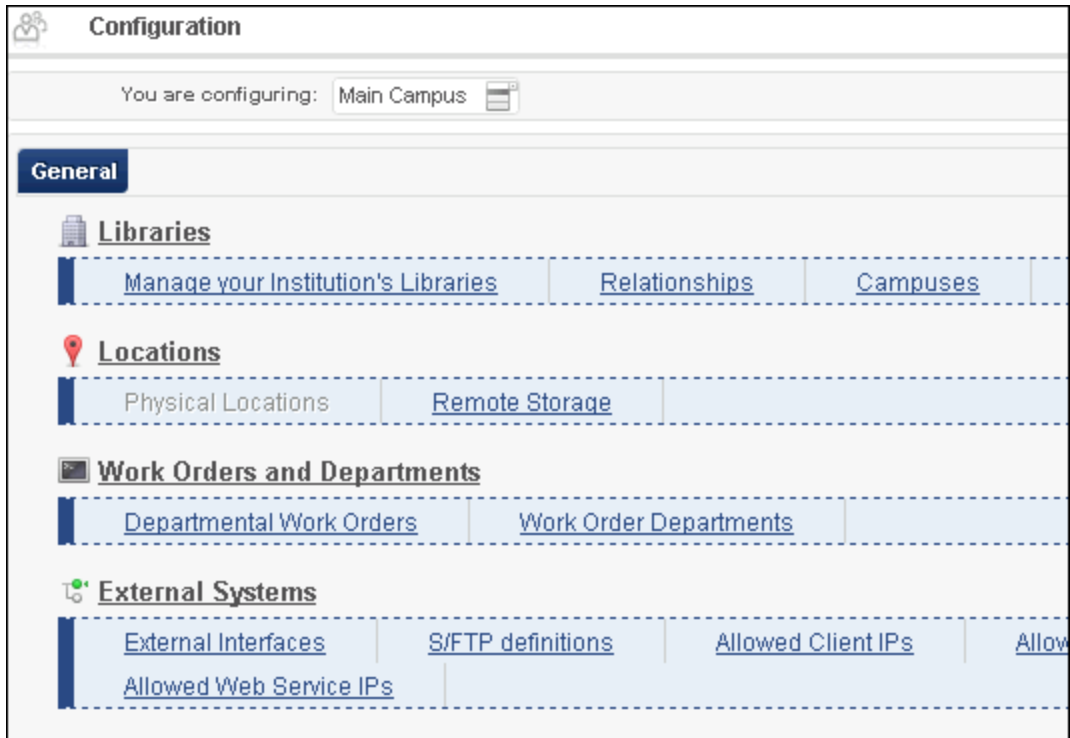


Figure 49 - Configuration Page

- 2 From the External Systems section, click **External Interfaces**.

The External System List page displays.

- 3 Click **Add External System**.

The External System page displays.

- 4 Enter the Code and Name information and select **Discovery Interface** from the Integration Type drop-down list.

The screenshot shows a web form titled "External System". It has a table with columns "Code" and "Name". Below the table, there are several fields: "Code" (with a red asterisk), "Integration Type" (with a red asterisk and a dropdown menu), "Description", and "Created By". The dropdown menu for "Integration Type" is open, showing a list of options: "Augmentation Definition", "Bursar", "Discovery Interface" (which is highlighted), "LDAP", "OCLC Client", "Payment", "Proxy Definition", "Remote Storage", "Resource Sharing", "Self Check", "User", and "Z3950".

Figure 50 - Discovery Interface Integration Type

- 5 Click **Next** and enter the URL for the URL template.

The following is an example URL:

http://domain.edu:8080/FloorMap/SayHi.do?callnum={call_number}&collection={location_name}&sublibrary={library_code}&source=QuestSrch&title={title}

- 6 Specify the **Supported libraries/Excluded locations**, and click **Save**.

FTP Include List Handling

Description

The purpose of this enhancement is to provide the ability to create an FTP include list.

Technical Instructions

The General System Administrator role is required for using this facility.

To access the mapping table for specifying your FTP include list information:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
The Configuration page displays.

Configuration
Department

You are configuring: Main Campus

General

Libraries

[Manage your Institution's Libraries](#)
[Relationships](#)
[Campuses](#)

Locations

[Physical Locations](#)
[Remote Storage](#)

Work Orders and Departments

[Departmental Work Orders](#)
[Work Order Departments](#)

External Systems

[External Interfaces](#)
[S/FTP definitions](#)
[Allowed Client IPs](#)
[Allowed Emails](#)
[Allowed S/FTP connections](#)
[Allowed Web Service IPs](#)

Figure 51 - Configuration Page

- From the External Systems section, click the **Allowed S/FTP connections** link.
The Mapping Table page displays.

Mapping Table
Department
Cancel
Customize

You are configuring: Main Campus
Organization Unit List

Table Information

Sub System

INFRA

Table Name

FtpIncludeList

Updated By

-

Last Updated

-

Table Description

Ftp Include List

Mapping Table Rows

Tools

| Enabled | include suffix | include ftp list description | Updated By | Last Updated | |
|---------|----------------------|------------------------------|------------|--------------|---------------------|
| | ftp.exlibris-usa.com | Ex Libris ftp server | - | - | Delete |

Create a New Mapping Row

include suffix

include ftp list description

Add Row

Cancel
Customize

Figure 52 – Allowed S/FTP Connections Mapping Table Page

- From the Create a New Mapping Row section, enter the include suffix and the include ftp list description for the FTP location to be added to the include list and click **Add Row**.

Mapping Table

Department
Cancel
Customize

You are configuring: Main Campus
[Organization Unit List](#)

Table Information

Sub System

INFRA

Table Name

FtpIncludeList

Updated By

-

Last Updated

-

Table Description

Ftp Include List

Mapping Table Rows

Tools

| Enabled | include suffix | include ftp list description | Updated By | Last Updated | |
|---------|----------------------|------------------------------|------------|--------------|--------|
| ✓ | ftp.exlibris-usa.com | Ex Libris ftp server | - | - | Delete |
| ✓ | ftp.example.com | Example FTP include | Ex Libris | 14/03/2012 | Delete |

Create a New Mapping Row

include suffix

include ftp list description

Add Row

Cancel
Customize

Figure 53 - Include Row Added

Update/Change Actions with Drools

Description

The purpose of this enhancement is to expand the capability with Drools to handle update and change actions.

Technical Instructions

The General Administrator role is required to modify the `.dslr` files.

To view the update and change options for `.dslr` files:

- From the Alma main menu > General > General, click **Configuration Files**.
The Configuration Files page displays.

| Configuration Files | | | |
|----------------------------------|----------------|--|---------------------------|
| You are Main Campus configuring: | | | |
| File Group | Match Profiles | Sub-Group | Serial |
| Customized | Enabled | Filename | Description |
| | ✓ | match/OCLCSerialMatchProfile.xml | OCLC Serial Match Method |
| | ✓ | match/LCCNSerialMatchProfile.xml | LCCN Serial Match Method |
| | ✓ | match/ISSNMatchProfile.xml | ISSN Match Method |
| | ✓ | match/IDsSerialMatchProfile.xml | IDs Serial Match Method |
| | ✓ | match/CDLSeMatchingProfile.xml | Fuzzy Serial Match Method |

Figure 54 - Configuration Files Page

- From the File Group drop-down list, select **Drools dsl and dslr files**; and from the Subgroup drop-down list, select **Merge**.

| | | | |
|------------|---------------------------------|-----------|--------|
| File Group | Match Profiles | Sub-Group | Serial |
| | Match Profiles | | |
| | Metadata Editing Configuration | | |
| Customized | External Interfaces | | |
| ✓ | Delivery and Viewers | | |
| | Repository Search Configuration | | |
| | Drools dsl and dslr files | | |
| | Deposit Configuration | | |

Figure 55 - File Group Drop-Down List

The .dslr list of files displays for the subgroup Merge.

| File Group | Drools dsl and dslr files | Sub-Group | Merge | Tools | | |
|------------|---------------------------|---|------------------------------------|------------|-------------|---------|
| Customized | Enabled | Filename | Description | Updated by | Update Date | Actions |
| ✓ | ✓ | drools/Replace245and035OCoLCifExist_Du... | Replace 245 and 035 OCoLC if exist | admin1 | 14/03/2012 | Actions |
| | ✓ | drools/Replace245and035OCoLCifExist.dslr | Replace 245 and 035 OCoLC if exist | - | - | Actions |
| | ✓ | drools/OverlayAllFieldsButLocal.dslr | Overlay all fields but local | - | - | Actions |
| | ✓ | drools/MergeNoChangeToOldValue.dslr | Keep only old value | - | - | Actions |
| | ✓ | drools/ConditionalSubjectHeadings.dslr | Conditional subject headings | - | - | Actions |

Figure 56 - Drools Files List (Subgroup Merge)

- Click the **Actions** button for a system-provided file to display the Customize and Duplicate options.

| | | | | | | | | | | | |
|------------|---------|---|------------------------------------|------------|-------------|---------|--|--|--|-------|-----------|
| File Group | | Drools dsl and dslr files | | Sub-Group | | Merge | | | | Tools | |
| | | | | | | | | | | | |
| Customized | Enabled | Filename | Description | Updated by | Update Date | Actions | | | | | |
| | | drools/Replace245and035OCoLCifExist_Du... | Replace 245 and 035 OCoLC if exist | admin1 | 14/03/2012 | Actions | | | | | |
| | | drools/Replace245and035OCoLCifExist.dslr | Replace 245 and 035 OCoLC if exist | - | - | Actions | | | | | |
| | | drools/OverlayAllFieldsButLocal.dslr | Overlay all fields but local | - | - | Actions | | | | | |
| | | drools/MergeNoChangeToOldValue.dslr | Keep only old value | - | - | Actions | | | | | |
| | | drools/ConditionalSubjectHeadings.dslr | Conditional subject headings | - | - | Actions | | | | | |
| | | | | | | | | | | | Customize |
| | | | | | | | | | | | Duplicate |

Figure 57 - Customize/Duplicate Action Options

For a duplicated file the Actions button displays the Edit, Duplicate, and Delete options.

File Group Drools dsl and dslr files Sub-Group Merge Tools

| Customized | Enabled | Filename | Description | Updated by | Update Date | |
|------------|---------|---|------------------------------------|------------|-------------|-----------|
| | | drools/Replace245and035OCoLCifExist_Du... | Replace 245 and 035 OCoLC if exist | admin1 | 14/03/2012 | Actions |
| | | drools/Replace245and035OCoLCifExist.dslr | Replace 245 and 035 OCoLC if exist | - | - | Edit |
| | | drools/OverlayAllFieldsButLocal.dslr | Overlay all fields but local | - | - | Duplicate |
| | | drools/MergeNoChangeToOldValue.dslr | Keep only old value | - | - | Delete |
| | | drools/ConditionalSubjectHeadings.dslr | Conditional subject headings | - | - | Actions |

Figure 58 - Duplicated File Action Options

4 Click **Customize** (or **Edit**) to view/change the .dslr file in which you are interested.

| | |
|--|---|
| Filename | <input type="text" value="drools/Replace245and035OCoL"/> |
| Description | Replace 245 and 035 OCoLC if e |
| Updated by | - |
| Update Date | - |
| Enabled | <input type="button" value="- Yes -"/> |
| Content | <pre>package com.exlibris.urm.mms.rules expander merge.dsl import com.exlibris.repository.mms.marc.* import com.exlibris.repository.mms.utils.drools.* import com.exlibris.core.infra.common.drools.utils.*; #global variable global MarcRecord targetObj rule "Merge Example 2" when merge then add MARC."245" if does not exists add MARC."035" if does not exists replace MARC.XXX excluding "245,035,001" replace MARC."035" when MARC."035"."a" does not contain "OCoLC" excluding</pre> |
| Cancel Customize | |

Figure 59 - .dslr File

Note: The action of changeTag and copyField/Subfield are accepting the MarcRecord object. The condition if field not exist returns the MarcRecord object. The rest of the conditions return the MarcDataField object.

Known Issues

The table below describes the known issues and their status.

Table 1 – Known Issues

| Description | Change | Status |
|---|---|--------|
| For FTP import, only one re-occurrence of a metadata import job can be defined. | Multiple re-occurrences are to be configurable. | Open |
| The standalone portfolio does not have the interface name in it. | It should have the interface name instead of the provider. | Open |
| The interface name that does not belong to any vendor should not have a link to the vendor. | It returns an empty vendor. | Fixed |
| The interface name in the package editor should allow the user's manual insertion. | The user should be able to insert a nonexistent interface instead of picking it up from the list. | Fixed |