



Alma June 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:

- [Alma June 2012 Release Highlights](#)
- [Access to June 2012 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [Systems](#)
 - [Resource Sharing](#)
- [Known Issues and Defect Fixes](#)

Alma June 2012 Release Highlights

Acquisitions

- Notification List on Orders

At the time of the order, it might be important to indicate that someone would like to be notified when an item is received or activated. In order to cater to this, a new tab has been added to the PO line. This tab lists the users who might be interested in knowing when the order is complete (item received, resource activated, or the PO line is cancelled). Users are notified by email.

Resource Management

- New Bibliographic Publishing to OCLC

As part of Alma interoperability, the ability to batch load bibliographic records to OCLC has been added.

- E-Resource Linking to the Community Zone (CZ) – Part 1

Migration cleanup and ongoing acquisition processes dictate that often there is a local title/package that needs to later be linked to a Community Zone entity. Phase 1 of this development allows for adding a standalone title to a linked package. The title is also linked to a knowledge base (KB) title.

- Electronic Portfolio-Level Search

This new enhancement enriches the staff user's search experience by providing for the ability to search the database using a presearch filter of electronic portfolios. This option is available for both simple and advanced searching, as well as from the persistent search box. It is also supported as part of set management.

- Physical Processing - Label Printing

Printouts are needed for labels such as spine labels and barcodes. Alma now provides the option of printing these labels by downloading a client application from the Alma menu (Resource Management Configuration Menu). The client application is able to activate a configurable, third-party application in order to print the labels, either online or as a batch process.

- New Match Routine

A new match routine based on MARC21 bibliographic 024 and 001 has been added as an out-of-the-box match profile.

Fulfillment

- Limit Loans by Physical Location

New configuration options enhance Alma's existing capability to limit the number of concurrent loans a user may have. It is now possible to set separate limits by library, location, material type, and user group.

- Request Item on Open Shelf

A library might have a default configuration that does not allow for requesting an item that is available and on open shelves. The Alma Terms of Use (TOU) configuration now allows for an override option enabling defined user groups to request items that cannot be requested by other users.

- Enhancements to the Fine Policy

Alma's overdue fine policy configuration has been enhanced so that a separate fine may be charged if an overdue item has been recalled.

- Enhancing the Work Order Process

Before the June release, physical items could only be moved to the work order department by activating a request on the item. Physical items can now be moved into the work order department without a request being made first. This can be done by simply wand the item into the system from the work order department.

Resource Sharing

- Resource Sharing Requests with the British Library

The June release of Alma sees a major new step in resource-sharing management in Alma, the ability to place resource-sharing requests with the British Library. Libraries are able to define the British Library as a resource-sharing partner and, thus, can send requests to the British Library via ARTEmail.



System




- Improvements to System Job Management

Enhancements have been added in order to improve the Alma monitoring process. New user interface features have been added related to the Scheduled, Running, and Completed tabs. In addition, there is now a provision for defining whether scheduled jobs are enabled or disabled.

Access to June 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: Interested Users Tab for a PO Line				
Resource Management: OCLC Publishing				
Resource Management: E-Resource Linking				
Resource Management: Electronic Portfolio Search				
Resource Management: Spine Label and Barcode Printing				
Resource Management: Match Routine for Bibliographic Data				
Fulfillment: Loan Limits				
Fulfillment: Override Option for On Shelf Request Policy				
Fulfillment: Additional Options for the Overdue Fine Policy				

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)			
Fulfillment: Streamlined Work Order Processing				
Systems: Monitoring Process/Additional Provisions for System				
Resource Sharing: Sending Resource Sharing Requests to the British Library				

Acquisitions

The following sections describe the features provided for the Acquisitions component in the June 2012 release of Alma.

Interested Users Tab for a PO Line

Description

The purpose of this enhancement is to add the facility in Alma to specify who should be notified when an item has become available at the circulation desk. This is accomplished via a new Interested Users tab for a PO line.

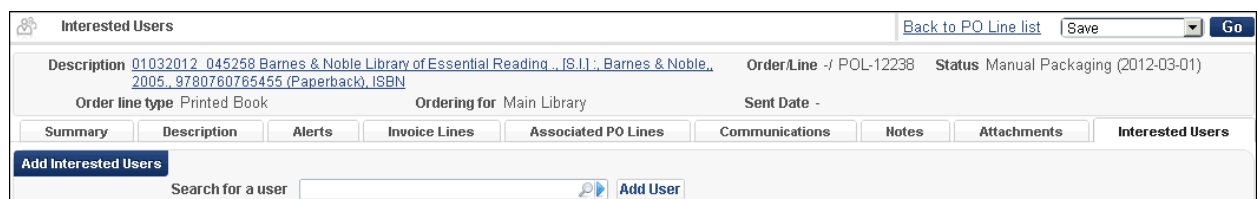
This enhances the Alma workflow by allowing the Purchasing Operator, at the time of order, to enter a list of users that should be notified when an item has been sent to be reshelfed.

Technical Instructions

The Purchasing Operator can access this enhancement.

To add interested users:

- 1 Access a PO line.
- 2 Click the **Interested Users** tab.



The screenshot shows the 'Interested Users' tab interface in Alma. At the top, there's a header bar with a 'Back to PO Line list' link, a 'Save' button, and a 'Go' button. Below this, the main content area displays order details: 'Description 01032012 045258 Barnes & Noble Library of Essential Reading, [S.I.], Barnes & Noble, 2005, 9780760765455 (Paperback), ISBN', 'Order Line -/ POL-12238', and 'Status Manual Packaging (2012-03-01)'. The 'Order line type' is 'Printed Book' and 'Ordering for' is 'Main Library'. Below the details, there's a row of tabs: 'Summary', 'Description', 'Alerts', 'Invoice Lines', 'Associated PO Lines', 'Communications', 'Notes', 'Attachments', and 'Interested Users'. The 'Interested Users' tab is currently selected. Below the tabs, there's a section titled 'Add Interested Users' with a search bar labeled 'Search for a user' and an 'Add User' button.

Figure 1 - Interested Users Tab

3 Enter a user name in the **Search for a user** field and click **Add User**.

The screenshot shows a web interface titled "Interested Users". At the top, there are links for "Back to PO Line list", "Save and continue", and a "Go" button. Below this, a header section contains the following information: Description: American & literary history, New York, NY, Oxford University Press... 1468-4365, ISBN, Order line type: Printed Book, Ordering for: Main Library, Order Line: -/ POL-4102, Status: In Review (2012-01-26), and Sent Date: -. Below the header is a navigation bar with tabs: Summary, Description, Alerts, Invoice Lines, Associated PO Lines, Communications, Notes, Attachments, and Interested Users. The "Interested Users" tab is active. Below the navigation bar is a section titled "Add Interested Users" with a search field labeled "Search for a user" and an "Add User" button. Below this is a table with two columns: "Name" and "Email". The table contains one entry: "Aaron, Daren" and "daren.aaron@abcuniversity.edu". There is a "Delete" button next to the entry. A "Tools" button is located at the bottom right of the table.

Name	Email
Aaron, Daren	daren.aaron@abcuniversity.edu

Figure 2 - Interested User Added

Note: Updating user email for notification to the interested user is handled through Alma User Management. The user's profile needs to have a preferred email address specified.

General Acquisitions Module Enhancements

The list below highlights recent enhancements in the Acquisitions module:

- The fund facet has been removed from the Purchase Order Lines in Review, PO Lines to Renew, and Claims pages. You can filter by fund using the search facility instead.
- **Closed** has been added as a PO line cancellation reason.
- A minus amount (credit) can be added for prepaid invoices.
- The default currency for an invoice or a PO line has been changed to U.S. dollars.
- The release of a fund encumbrance is now reflected in the fund transaction.
- If you receive an item but do not select **Keep in department**, a transit request is created for the item so that it can be moved to the appropriate location.

Resource Management

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

OCLC Publishing

Description

The purpose of this enhancement is to complete the publishing to OCLC options with the following basic services for publishing to OCLC:

- The holding library symbols may be set on matching records with a new or corrected status.
- The holding library symbols may be removed from records with a delete status.
- Records that do not match an existing OCLC record may be added to WorldCat.

The new Synchronize Bibliographic Records with OCLC publishing option is in addition to the already existing Synchronize Local Holdings with OCLC option that allows the maintenance of local MARC holdings records linked to master records in WorldCat. If WorldCat Local is being used, institutions may maintain holdings data for all titles with this service.

Records may be published to OCLC using either synchronize option as defined in the records' set management tag.

Technical Instructions

The following roles can access this publishing facility:

- Repository Administrator
- Physical Inventory Operator
- General System Administrator

To view the OCLC import publishing 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.

Publishing Profiles		
Add Profile		
Active	Name	Description
<input checked="" type="checkbox"/>	Publish bib records to Primo	Setup the parameters for publishing bibliographic records to Primo - this is a test
<input checked="" type="checkbox"/>	Publish electronic records to Primo Central	Publish electronic records to Primo Central
<input checked="" type="checkbox"/>	Synchronize local holdings with OCLC	Synchronize local holdings with OCLC
<input checked="" type="checkbox"/>	Synchronize bibliographic records with OCLC	Synchronize bibliographic records with OCLC

Figure 3 - Publishing Profiles Page

- 3 View the OCLC publishing profiles provided with the Alma software.
- 4 Click the **Actions** button to display the Configure, Run, and History options.

Use the FTP configuration option on the Publishing Profile Details page to enter your FTP information.

Publishing Profile Details	
Profile Details	
Profile name *	Synchronize local holdings with OCLC
Profile description	Synchronize local holdings with OCLC
OCLC institution symbol *	Project number *
Submission Format	
FTP configuration	Sub-directory *
Schedule Publishing Process	Week

Figure 4 - Publishing Profiles Details Page

- 5 Use/click the check mark in the Active column (of the Publishing Profiles page) to activate or deactivate a publishing profile.

To set the Export to OCLC attribute for imported records:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the Record Import section, click **Import Profiles**.
- 3 For an existing profile, select **Actions > Edit**.
- 4 Click the **Set Management Tags** tab.
- 5 From the **Synchronize with OCLC** drop-down list, select the publishing option to set how the imported records are to be managed regarding synchronization with WorldCat.

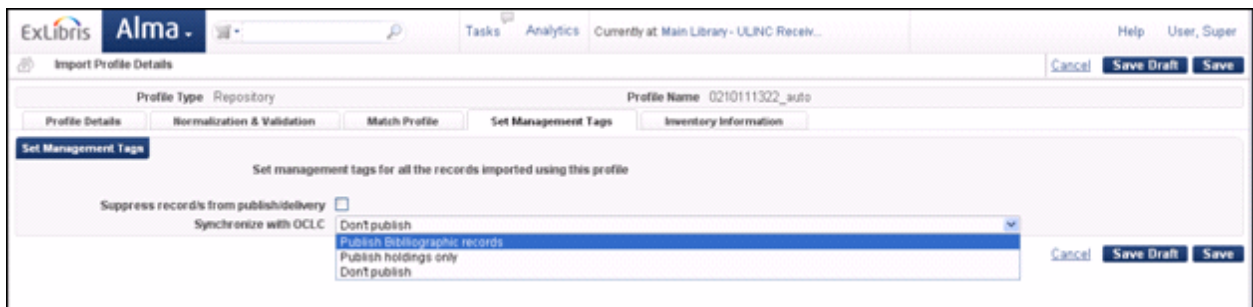


Figure 5 - Set the Synchronize with OCLC Publishing Option for WorldCat

To view/set the WorldCat tag options for a specific record:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.
- 2 Click **Tools > Set Management Tags** and set the **Export to WorldCat** tag options.

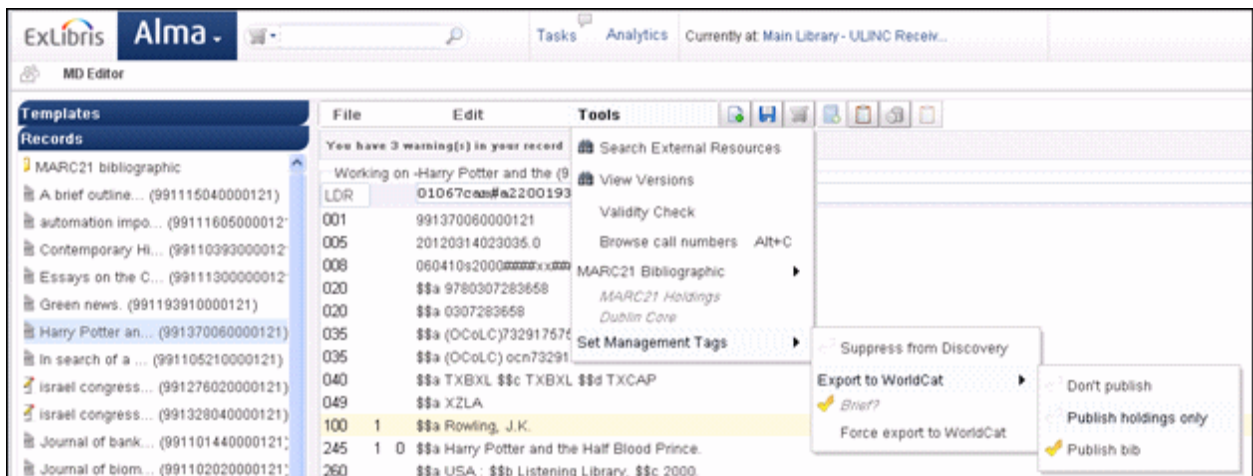


Figure 6 - Set Management Tags for Export to WorldCat

E-Resource Linking

Description

The purpose of this enhancement is to enable e-resource linking (as part of migration cleanup and ongoing acquisitions processes) to the central knowledge base and/or Community Zone for a local title or package.

This provides the benefit of Community Zone support and updates.

Technical Instructions

The Electronic Inventory Operator can access this capability.

When you know the provider of the electronic resource, you should attempt to locate and link the local electronic resource to a CZ electronic resource in order to benefit from CZ updates.

To view this capability:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Search for a portfolio.
- 3 From the search results, select **Locate and Link** for the standalone portfolio.

The Link Standalone Portfolio to Community Zone Package page displays.

Link Standalone Portfolio to Community Zone Package

Select Portfolio from Community Zone

- 1 ☐ **Electronic news**
EBSCOhost OmniFile Full Text Select: getFullTxt
Available from 1998 until 2002.
- 2 ☐ **Electronic news**
EBSCOhost Business Abstracts with Full Text : getFullTxt
Available from 1998 until 2002.
- 3 ☐ **Electronic news**
EBSCOhost OmniFile Full Text Mega : getFullTxt
Available from 1998 until 2002.
- 4 ☐ **Electronic news**
ProQuest Engineering Journals New Platform: getFullTxt
Available from 1995 until 2002.

Figure 7 - Link Standalone Portfolio to Community Zone Package Page

- 4 Select the radio button for the package to link and click **Next**.
- 5 Select the descriptive information source and click **Next**.

Link Standalone Portfolio to Community Zone Package

Select descriptive information source

- ☒ Use descriptive metadata from the community
- ☐ Keep local descriptive metadata. Note that the descriptive metadata will not be synchronized with updates in the community zone.

Figure 8 - Select Descriptive Information Source

6 Review and confirm.

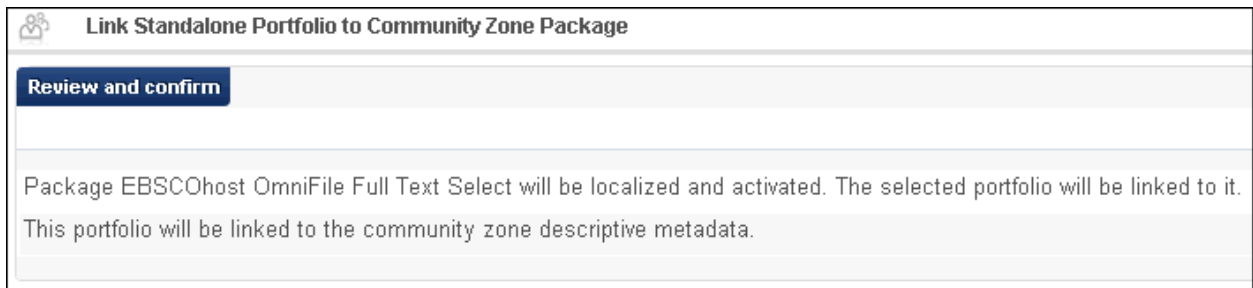


Figure 9 - Review and Confirm

7 To complete the linking procedure, click **Locate and Link**.

A confirmation message displays.

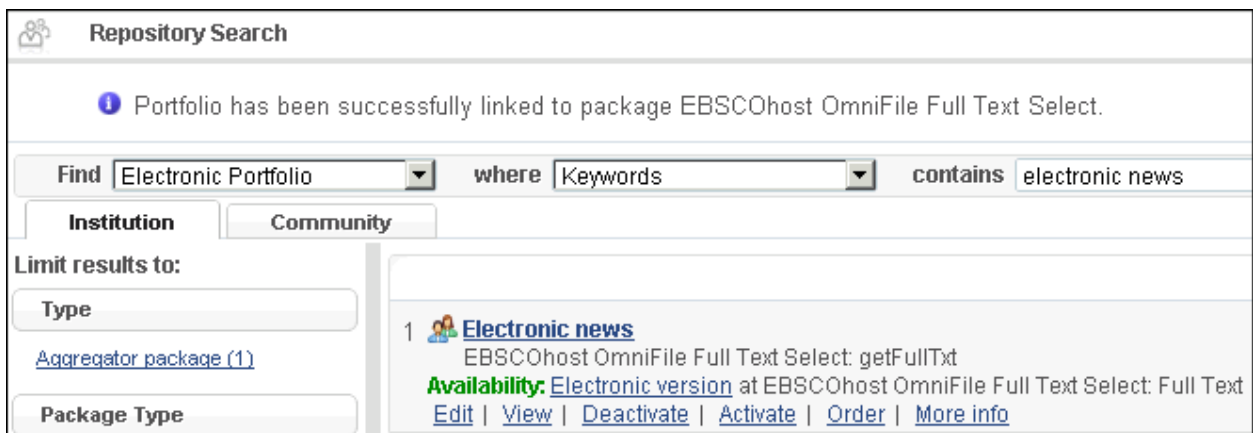


Figure 10 - Linking Confirmation Message

Electronic Portfolio Search

Description

The purpose of this enhancement is to provide an Electronic Portfolio level search from the Repository Search page and the Persistent Search box and the following search result options:

- Display electronic title to which the portfolio is linked with the ability to open the MMS record view
- Display availability information
- Display title as it is in the portfolio list for a given title or package
- Activate/deactivate the portfolio
- Open the portfolio in view mode
- Open the portfolio in the Resource Editor

- Enable saving queries for portfolios
- Enable portfolio facet

Technical Instructions

Anyone with the ability to search the database can access this enhancement.

To view the Electronic Portfolio search option from Repository Search:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Open the **Find** drop-down list.

The Electronic Portfolio search option displays.

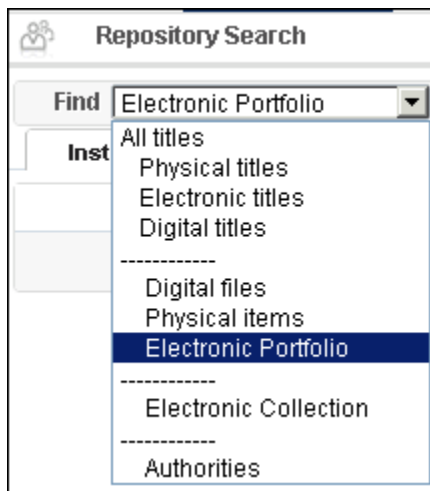


Figure 11 - Electronic Portfolio Repository Search Option

- 3 Select **Electronic Portfolio**, enter your search criteria, and click **Go**.
Options that are relevant to an electronic portfolio search display in the **where** drop-down list.
- 4 View the portfolio options displayed with your search results.

To view the Electronic Portfolio search option from the Persistent Search field:

- 1 Open the **Persistent Search** menu.

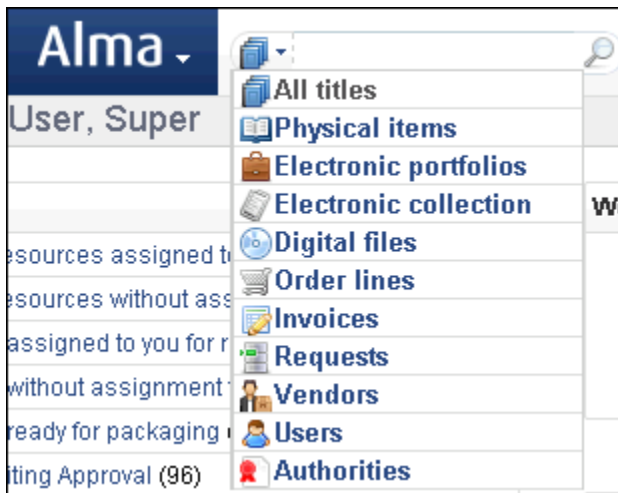


Figure 12 - Electronic Portfolio Option from the Persistent Search Field

- 2 Select **Electronic portfolios** from the list.
- 3 Enter your search criteria.
- 4 View the portfolio options displayed with your search results.

Spine Label and Barcode Printing

Description

The purpose of this enhancement is to provide the facility to print spine labels and barcodes that can be accomplished with:

- A client application that can be downloaded from the Alma Resource Management > Resource Configuration > Configuration Menu to your PC
- Your third-party, XML-based PC print solution

This is processed by communicating with Alma through the Web service that requires you to be a registered user in Alma.

Technical Instructions

The following roles can access these enhancements:

- Catalog Administrator
- Repository Administrator

As a prerequisite, you need to have a third-party, XML-based PC print solution, such as BIAF®, installed on the PC that is used for label printing. Customers that want to use the Ex Libris-provided BIAF spine label application should contact Ex Libris Support.

Note: The application must be configured to accept the Alma XML format as a valid input.

In addition, the Alma client application must be downloaded from Alma and installed on your PC. See the installation process below.

Once the Label Printer client application is installed, the process flow is:

- 1 Launch the Alma client application on the PC from which you are printing the labels.
- 2 Wand/enter as input either an item barcode or an item ID (PID) and send.
- 3 After sending the barcode/item ID, the client application triggers an Alma Web service.
- 4 The Web service returns the item information in XML format.
- 5 The client application does one of the following:
 - a Activates a configurable third-party, PC XML-based print solution and sends the XML as input to that third-party solution.
 - b Places the XML on a client-side directory.

To download the Alma client application:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the General section, click **Label Printing Tool**.

The Label Printer page displays.



Figure 13 - Label Printer Page

- 3 Click **Download**.
- 4 The `urm_label_printer.zip` displays.

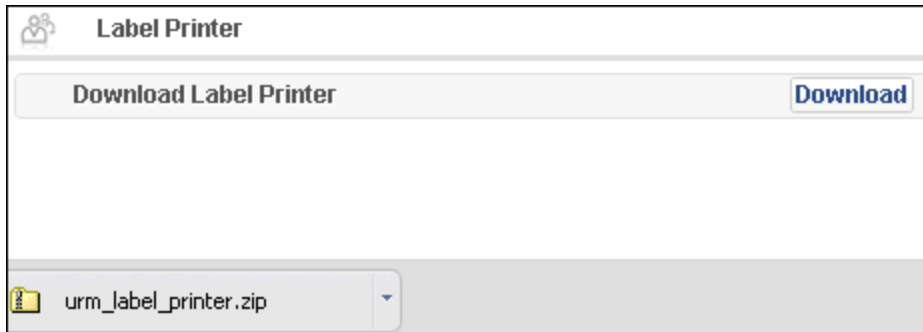


Figure 14 - Label Printer File

5 Open the `urm_label_printer.zip` file.

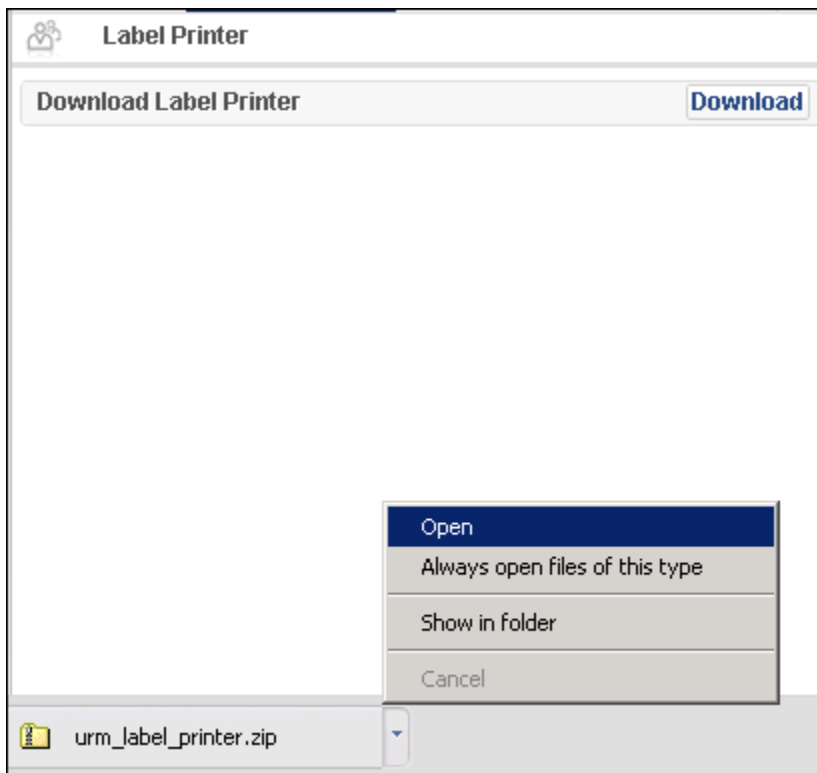


Figure 15 - Open Label Printer File

The `urm_label_printer.zip` file opens in `C:\Documents and Settings\<user ID>\My Documents\Downloads`.

6 Click **Extract All Files**.

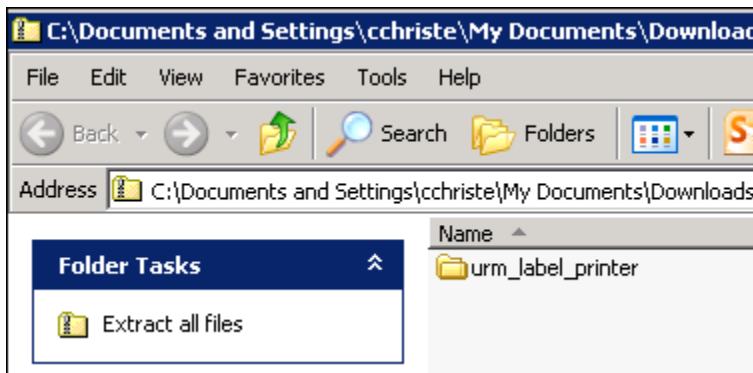


Figure 16 - Extract All Files

The Extraction Wizard opens.

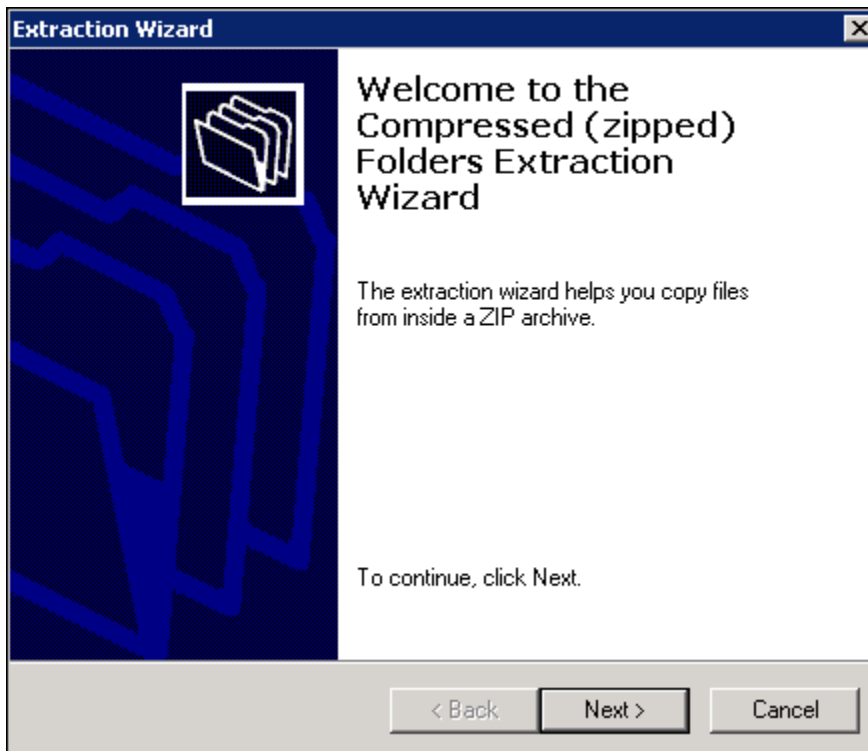


Figure 17 - Extraction Wizard

7 Complete the wizard steps to store the label-printing files/folders on your PC.

To install and configure the downloaded Alma client application on your PC:

- 1 Run the `run.bat` file from the `bin` directory.

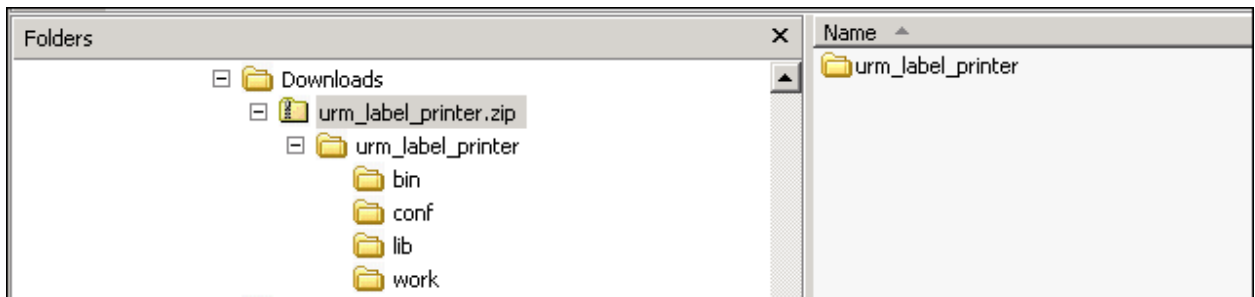


Figure 18 - bin Directory

The path is `C:\Documents and Settings\<user ID>\My Documents\Downloads\urm_label_printer.zip\urm_label_printer\bin`.

Note: As a prerequisite, the label software requires Java JRE, version 7. The application opens a wizard to install this prerequisite if it is not already installed on your PC.

Once the software is successfully installed, the Label Printer application opens.

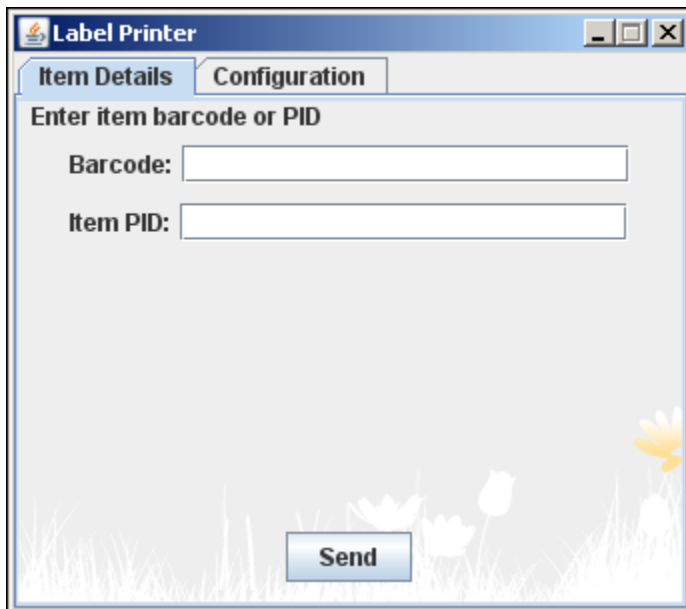


Figure 19 - Label Printer Application

- 2 Click the **Configuration** tab.

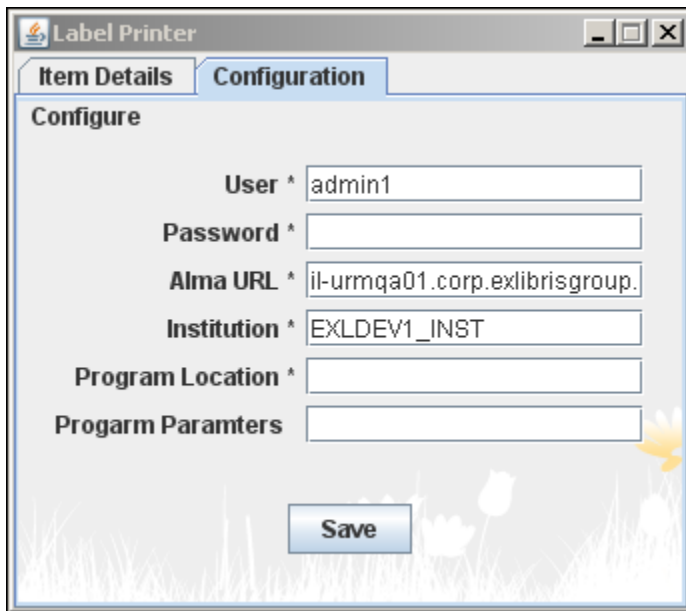


Figure 20 - Label Printer Configuration Tab

- 3 Enter the required information and click **Save**.

As a result of the installation process, the following fields are automatically entered:

- User
- Alma URL
- Institution

The user name and password should be the Alma login information of the staff operator that uses the application.

The Program Location and Program Parameters fields are intended for your third-party, XML-based PC print program. For BIAF, parameters such as `-print` or `-preview` can be specified.

Match Routine for Bibliographic Data

Description

The purpose of this enhancement is to provide a match routine for bibliographic data by matching fields 024 and 001 (MMS ID) that includes a match profile as part of the Alma software and the ability to use the matching capability with Alma's metadata import.

Technical Instructions

The Catalog Administrator role can access this enhancement.

To set the Match Profile:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the Record Import section, click **Import Profiles**.
The Run Import page displays.
- 3 For a specific profile, select **Actions > Edit**.
- 4 Open the **Match Profile** tab.
- 5 For the Serial Match Method, select **IDs Serial Match Method**; and for the Non Serial Match Method, select **IDs Match Method**.

General Resource Management Module Enhancements

The item below highlights a recent enhancement in the Resource Management module:

- The list of active packages (providers) has been extended for the definition of display logic rules.

Fulfillment

The following sections describe the functions provided for the Fulfillment component in the June 2012 release of Alma.

Loan Limits

Description

Alma's existing capability to limit the number of concurrent loans a user may have has been enhanced with the option to set separate limits for library, location, material type, and user group. This provides more granular loan limit alternatives.

Technical Instructions

The Fulfillment Administrator role can access this enhancement.

To view this enhancement:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Patron Configurations section, click **Loan Limits**.
The Loan Limit Rules page displays.
- 3 Click the **Add Rule** button.
- 4 Enter the loan limit parameters.

The Name input parameter provides the following drop-down list options:

- Library
- Location
- Material Type
- User Group

Input Parameters

No records were

Name

Op

Library

Location

Material Type

User Group

Figure 21 - Input Parameter Name Drop-Down List

- 5 Click **Add Parameter** for each input specified.

The display is updated to show each input parameter that you add.

Loan Limit

Input Parameters

Name * CC_Alumni_Ex

Description

Created By User, Super Created On 29/05/2012

Updated By User, Super Updated On 29/05/2012

Input Parameters

Name	Operator	Value
User Group	=	Alumni
Library	=	Main Library
Location	=	Main Library - Reserves

Name Operator Value

Possible Values > Add Parameter

Output Parameters

Loan limit * 7

Figure 22 - Input Parameters Added

- 6 When you are finished, click **Save**.

The loan limit rule that you created is added to the list on the Loan Limit Rules page.

Loan Limit Rules			
Rules List			
Filter All			
Add Rule			
Enabled	Move Up	Move Down	Rule Name
<input checked="" type="checkbox"/>		<input type="button" value="v"/>	STUDENT_GRADUATE
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	TEST
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	GUEST
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	ALUMNI
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	STUDENT_UNDERGRADUATE
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	EMPLOYEE
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	STAFF
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	FACULTY
<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		CC_Alumni_Ex

Figure 23 - Loan Limit Rules List

- To enable or disable the loan limit rule, click the check mark in the Enabled column.

Override Option for On Shelf Request Policy

Description

The Fulfillment Unit On Shelf Request Policy is now enhanced with an override option that is configurable as an additional policy for a Request Terms of Use in Terms of Use Management.

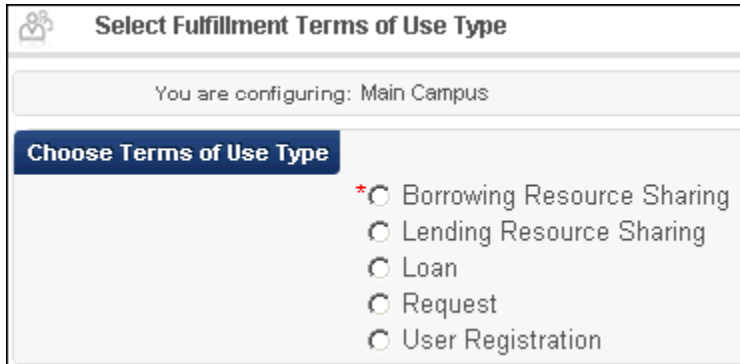
Technical Instructions

The Fulfillment Administrator role can access this enhancement.

To view the On Shelf Request Policy:

- From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- From the Physical Fulfillment section, click **Terms of Use and Policies**.
The Terms of Use Management page displays.

- 3 Click the **Add a Terms of Use** button.
- 4 Select **Request** and click **Next**.



Select Fulfillment Terms of Use Type

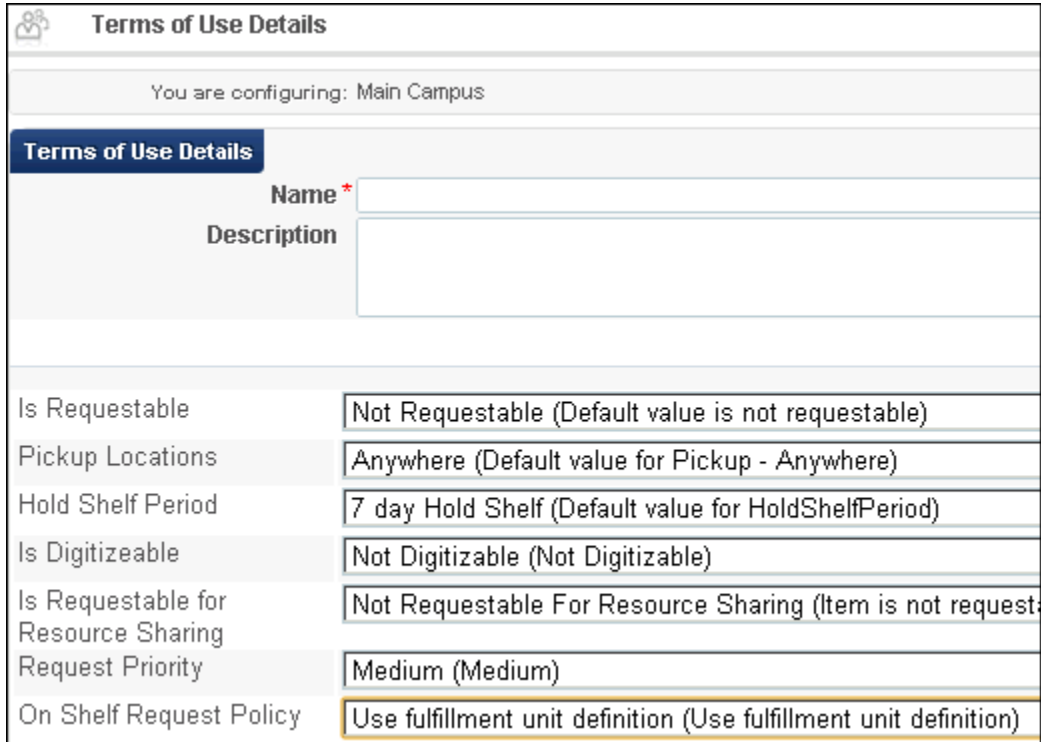
You are configuring: Main Campus

Choose Terms of Use Type

- ☒ Borrowing Resource Sharing
- ☐ Lending Resource Sharing
- ☐ Loan
- ☐ Request
- ☐ User Registration

Figure 24 - Select Request

The On Shelf Request Policy parameter displays on the Terms of Use Details page.



Terms of Use Details

You are configuring: Main Campus

Terms of Use Details

Name *

Description

Is Requestable	Not Requestable (Default value is not requestable)
Pickup Locations	Anywhere (Default value for Pickup - Anywhere)
Hold Shelf Period	7 day Hold Shelf (Default value for HoldShelfPeriod)
Is Digitizeable	Not Digitizable (Not Digitizable)
Is Requestable for Resource Sharing	Not Requestable For Resource Sharing (Item is not requestable)
Request Priority	Medium (Medium)
On Shelf Request Policy	Use fulfillment unit definition (Use fulfillment unit definition)

Figure 25 - On Shelf Request Policy Parameter

- 5 From the drop-down list, view the On Shelf Request Policy options.
 - Use fulfillment unit definition
 - Allow for pickup anywhere regardless of availability

Additional Options for the Overdue Fine Policy

Description

Alma's overdue fine policy has been enhanced so that a separate fine may be charged if an overdue item has been recalled.

Technical Instructions

The Fulfillment Administrator role can access this enhancement.

To view the Recalled Overdue Fine parameter:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Physical Fulfillment section, click **Terms of Use and Policies**.
The Terms of Use Management page displays.
- 3 Click the **Add a Terms of Use** button.
- 4 Select **Loan** and click **Next**.

The Recalled Overdue Fine parameter displays on the Terms of Use Details page (for loans).

Terms of Use Details		
Name *		
Description		
<div>Tools</div>		
Is Loanable	Not For Loan (Not for loan default)	Actions
Is Recalable	No Recall (Default Recall is not possible)	Actions
Due Date	No Due Date - Non-circulatable (Default value - No Due date)	Actions
Requested Item Due Date	1 Week Requested Item (Due date for requested items = 1 week. Default.)	Actions
Recall Period	Recall Notice Time 7 (7 days added from recall notice dispatch to new due date for the recalled item.)	Actions
Renew Fee	No Renewal Fee (Default No Renewal Fee)	Actions
Lost Item Fine	Lost Item Fine 50 (Lost item fine = 50 units. Default.)	Actions
Lost Item Replacement Fee	Lost Item Replacement Fee 50 (Fee for replacing lost item. Default)	Actions
Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund (Default lost item replacement refund)	Actions
Maximum Fine	Maximum Fine 400 (Maximum fine = 400 units. Default.)	Actions
Overdue Fine	Overdue Fine for All Days (An overdue fine is calculated for all days. Default.)	Actions
Recalled Overdue Fine	Recalled Overdue Fine for All Days	Actions
Grace Period	1 Open Hour Grace Period (1 grace hour. Only open hours are counted. Default.)	Actions
Is Renewable		Actions
Maximum Renewal Period	No Maximum Renew Period (Default Maximum Renewal Period)	Actions
Closed Library Due Date Management	No Change To Due Date (Default value for ClosedHourManagement)	Actions

Figure 26 - Recalled Overdue Fine Parameter

- 5 From the drop-down list, view the **Recalled Overdue Fine** options that have been defined or use the **Actions** button to add policy options.

Note: An overdue fine can be defined as zero or as a fine amount per day or hour.

Streamlined Work Order Processing

Description

Physical items can be moved into the work order department without a request having first been made. This can be done by simply wand the item into the system from the work order department.

Note: For the work order to be created, the operator must have set the **Currently At** option to the required work order department.

Technical Instructions

The Work Order Operator role can access this capability.

To view the change:

- 1 From the Alma main menu > Fulfillment > Resource Requests, click **Scan in Items**.
- 2 Wand an item with no existing work order.
- 3 Observe the Alma changes.

General Fulfillment Module Enhancements

The item below highlights a recent enhancement in the Fulfillment module:

- In the case of multiple requests for the same title, when one request has been processed, the system now recalculates the optimal item for fulfilling another request.

Systems

Monitoring Process/Additional Provisions for System Jobs

Description

The purpose of this enhancement is to improve the Alma monitoring process with user interface enhancements to the Scheduled, Running, and Completed tabs and additional provisions that include:

- Completed tab
 - Addition of the Submit Date column
 - Default sort is by Submit Date with the option to view previous dates using the up arrow
 - Tooltip implemented to replace the Description column
 - Addition of From Date and To Date filters
 - Cancel is changed to Back on the Job Report page (see Actions > Report)
- Running tab
 - Addition of the Submit Date column
 - Default sort is by Submit Date with the option to view previous dates using the up arrow
 - Tooltip implemented to replace the Description column
 - Addition of the Status column
 - Display only real/actual running statuses
 - Addition of message to notify user to check that a job is not really running (from the SaaS administration display)
- Scheduled tab
 - For all users, display the scheduled job in read-only mode (previously, records only displayed for Ex Libris Support)
 - Ex Libris Support also has permissions to activate/deactivate a scheduled job and has permissions to run any job immediately from this list
- Additional provision

- Parameter added to determine if scheduled jobs are enabled or disabled
- SaaS administration process has been modified to ignore the institution at wakeup when scheduled jobs are disabled
- After provisioning, remigration, or institution copy (import), the scheduled jobs parameter is set to disabled
- Message displays on the tab when scheduled jobs are disabled in the Scheduled tab



Figure 27 - Scheduled Jobs Disabled Message

Technical Instructions

The following roles can access these enhancements:

- Digital Inventory Operator
- General System Administrator
- Requests Operator
- Cataloger
- Electronic Inventory Operator

For the monitor processing options, privileges include process, view, and add.

Ex Libris Support has the following additional permissions to:

- Run an abort in the Running tab on jobs which cannot be aborted otherwise.
- Enable/disable scheduled jobs and invoke **Run now** from the Scheduled tab.

To view the monitoring process capability for system jobs:

- 1 From the Alma main menu > Resource Management > Processes, click **Monitor Processes**.
- 2 View the Scheduled, Running, and Completed tabs.

Resource Sharing

Sending Resource Sharing Requests to the British Library

Description

Alma's resource sharing request management functionality has been enhanced to enable using the British Library's ARTEmail format for placing a borrowing request at the British Library. The institution can now:

- Define the British Library as a resource sharing partner that uses ARTEmail as its profile type
- Define the keywords that may be used when sending a request to the British Library
- Define the customer ID and password that are to be used when sending a request to the British Library
- Select the British Library as a resource sharing request's target, effectively resulting in an ARTEmail formatted email being sent to the British Library defined email address when the request is sent

Requests may be directly placed by the patron from Primo and managed by the institution for loan from the British Library.

Technical Instructions

The Fulfillment Administrator can configure the resource-sharing-related configurations.

The Fulfillment Services Operator can place requests for management with the British Library.

To configure the enhancements:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Resource Sharing section, click **Partners** .
The Resource Sharing Partners List page displays.
- 3 Click **Add Partner**.
- 4 Complete the relevant information.

Note: The Profile Type for British Library is ARTEmail.

ExLibris Alma

Resource Sharing Partner

Partner Code: - Partner Name: -

General Information Contact Information Parameters

Partner Information

Code * BL Name * British Library

Profile Type * ARTEmail Status Active

Average Supply Time 3 Delivery Delay 1

Currency Lending Workflow

Borrowing Workflow

Figure 28 - Resource Sharing Partner General Tab

5 In the Parameters tab, set the:

- Mail address
- Allowed keywords
- Customer IDs/passwords

General Information Contact Information Parameters

Email

ARTEmail Address * artemail@art.bl.uk

Keyword Codes

Service Codes

☒ BL Only Search

☐ BL and Backup Libraries Search

☐ BL and Locations Search

☐ BL, Locations and Worldwide Search

☐ Worldwide Search only

Delivery Format Codes

☒ Encrypted Download 2 hours

☒ Encrypted Download 24 hours

☒ Encrypted Download Within 4 days

☒ Loan 24 hours

☒ Loan Within 4 days

☐ Paper 2 hours

☐ Paper 24 hours

☐ Paper Within 4 days

☐ Secure File Transfer(Ariel) 2 hours

☐ Secure File Transfer(Ariel) 24 hours

☐ Secure File Transfer(Ariel) Within 4 days

☐ Unencrypted Download 2 hours

☐ Unencrypted Download 24 hours

☐ Unencrypted Download Within 4 days

Queries Codes

☐ Copyright Fee Paid service required

☒ Do not place order on a waiting list

☐ Indicate that you accept the charges quoted by a partner supplier

☐ Item must be available for reading at home

☐ Report that a recalled Loan has already been returned

☐ Request progress report if Speed exceeded and no response received

☒ Request to cancel an order on a waiting list

☒ Request to renew a loan

Figure 29 - Resource Sharing Partner Parameters Tab

To send a request to the British Library:

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests** to:
 - Manage existing requests in the list (**Edit** link)
 - Create a new request (**Add** button)

- 2 Click **Add** and search for and select a title.
- 3 In the General Information tab, select **British Library** from the Partner field drop-down list (that you previously defined).

The screenshot shows the 'Resource Sharing Borrowing Request' form with the 'General Information' tab selected. The 'Request Attribute' section contains the following fields:

- Title:** Prisoners in America. [Lloyd E. Ohlin, editor]
- Requester *:** Johns, Sally - Undergraduate Student
- Partner:** British Library (selected from a dropdown)
- External Identifier:** (empty field)
- Format:** Physical (selected from a dropdown)
- Needed By:** (empty field)
- Pickup At:** Resource Sharing Library (selected from a dropdown)
- Agree to Copyright terms *:** ☒
- Request Note:** (empty text area)

Figure 30 - Resource Sharing Borrowing Request General Information Tab

- 4 Use the **Parameters** tab to set the keywords and customer ID that is to be used for this request.

The screenshot shows the 'Resource Sharing Borrowing Parameters' form with the 'Parameters' tab selected. The 'General Information' tab is also visible. The 'Parameters' section contains the following fields:

- Service Codes:**
 - ☒ BL and Locations Search
 - ☐ BL and Backup Libraries Search
- Queries Codes:**
 - ☐ Request to renew a loan
 - ☐ Report that a recalled Loan has already been returned
 - ☐ Request to cancel an order on a waiting list
- Delivery Format Codes:** Loan 24 hours (selected from a dropdown)
- Customer Id *:** INST1 (selected from a dropdown)

Figure 31 - Resource Sharing Borrowing Parameters Tab

- 5 From the Borrowing Requests List, use the Send option to send the request to the British Library.

Resource Sharing Borrowing Requests

Status: All Partner: All

[Add](#)

☐ Select All

1 ☐ [The swell's night guide, or, A peep through the great metropolis, under the dominion of ne chaffing cribs, the introducing houses, the singing and lu](#)
Book
Status: Created borrowing request
[Edit](#) | [Remove](#) | [Duplicate](#)

2 ☐ [Life in London, or, The day and night scenes of Jerry Hawthorne, esq., and his elegant frie metropolis](#)
Book
Status: Returned item to partner
[Edit](#) | [Remove](#) | [Duplicate](#) | [Send](#)

3 ☐ [Prisoners in America. \[Lloyd E. Ohlin, editor\]](#)
Book (Englewood Cliffs, N.J., Prentice-Hall [1973])
ISBN: 0137108141 (pbk) and others
Subject: Criminal justice, Administration of#Addresses, essays, lectures.#United States -- Corre
Status: Created borrowing request
[Edit](#) | [Remove](#) | [Duplicate](#) | [Send](#)

Figure 32 - Send Option

The request may also be placed using Primo's GetIt tab.

Request item currently out
Resource Sharing Library 2 Hour (2 Hours) [Request](#)

Other Services
[Digitization](#)
[Resource Sharing Request](#)

Figure 33 - Resource Sharing Request via Primo GetIt Tab

Known Issues and Defect Fixes

The sections below describe the known issues and defect fixes.

Known Issues

- The **View license** link is not displayed in **More info** for an **Electronic Portfolio** search.

Defect Fixes

- For FTP import, only one recurrence of a metadata import job can be defined and multiple re-occurrences should be configurable