



## Alma May 2013 Release

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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 May 2013 Release Highlights](#)
- [Access to May 2013 Features](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - [Data Services](#)
  - [Alma Show Me How](#)
  - [Acquisitions](#)
  - [Resource Management](#)
  - [Fulfillment](#)
  - [General](#)
  - [User Management](#)
  - [Resource Sharing](#)
  - [Analytics](#)
  - [System Enhancements](#)

# Alma May 2013 Release Highlights

## Alma Analytics

- E-Inventory Data Exposed in Analytics

A new subject area, E-Inventory, has been added to Alma Analytics. Reports, widgets, and dashboards can now be created from E-Inventory data.

## Acquisitions

- Visual Indicator for Rush Orders

A visual indicator for rush orders has been added to all task lists and PO line details.

## Resource Management

- Advanced Search Enhanced with **Has Inventory** and **Has Items** Conditions

These great new options allow you to searching for titles that have or do not have inventory (physical, electronic, or digital) or to search for holdings with or without items.

- Global Changes – Bulk Processing of Holdings Records

Alma now offers the option to update holdings information for a physical set of items or titles.

- Withdraw Items Process Task Parameters Enhanced

The parameter **delete childless holdings and bibliographic records** has been added as an option to the withdraw items process.

- NLM MeSH Available in the MD Editor

MeSH records were loaded into the Community Zone (CZ) in the April release. It is now possible to create or edit MeSH records in the MD Editor and to access these heading records in the Community Zone.

- Import Profile Enhanced with Dublin Core XML/Crosswalk Options

This great new feature provides the capability to import Dublin Core XML (in the DSpace simple archive format) and use Alma's crosswalk capability to automatically convert the imported XML to MARCXML and MARC21 bibliographic records.

- **Incremental Updates Enhancement to Portfolio Loader**

This enhancement provides additional flexibility for managing electronic portfolios of a package by loading a file that includes only incremental changes to the portfolio list of the package.

- **Enhancing Search Results**

Alma has been updated to enable successful repository search results for materials where staff may either include or omit articles in their search criteria. Records are now indexed with and without the article to enable these results.

## **Fulfillment**

- **Direct Linking Configuration Enhancement**

It is now possible to control the conditions in which a patron will automatically be directed to an electronic service via the UResolver.

- **Transfer Requests**

This enhancement provides the ability to transfer resource requests from one circulation desk to another circulation desk.

## **User Management**

- **Alma and SIS Integration Enhancements**

Integration with the Student Information System (SIS) has been enhanced to include checks for corrupt data and user name uniqueness. It is now possible to enable blocking a student in the SIS from certain activities until the blocked student clears any outstanding business with the library.

- **Update Externally-Managed Users in Alma**

There is now more flexibility for managing/editing user information dynamically for externally managed users between the normally scheduled SIS synchronization update jobs.

## **Resource Sharing**

- **ISO ILL Based End-to-End Support**

With the May release, Alma provides the capabilities to process the full set of resource sharing activities and manage communications with resource sharing partners utilizing the

ISO ILL messages ILL Request, Shipped, Received, and Returned. This means that Alma can participate in full ISO-based transactions as either a borrower or a lender.

- Enhanced Receive and Return Options

Enhancements to provide additional flexibility related to receiving and returning items in Resource Sharing have been implemented.



## Access to May 2013 Features

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

Feature	No Activation/ Setup Required (Note: Automatically visible to all users with the appropriate user role/permission)	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Acquisitions: <a href="#">Visual Indicator for Rush Orders</a>				
Resource Management: <a href="#">Advanced Search Enhanced with Has Inventory Condition</a>				
Resource Management: <a href="#">Global Changes – Bulk Processing of Holdings Records</a>				
Resource Management: <a href="#">Withdraw Items Process Task Parameters Enhanced</a>				
Resource Management: <a href="#">NLM MeSH Available in the MD Editor</a>				
Resource Management: <a href="#">Incremental Updates Enhancement to Portfolio Loader</a>				



Feature	No Activation/ Setup Required <small>(Note: Automatically visible to all users with the appropriate user role/permission)</small>	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Resource Management: <a href="#">Import Profile Enhanced with Dublin Core XML/Crosswalk Options</a>				
Fulfillment: <a href="#">Direct Linking Configuration Enhancement</a>				
Fulfillment: <a href="#">New Hold Shelf Processing Option</a>				
Fulfillment: <a href="#">Transfer Requests</a>				
General: <a href="#">Integration System Type</a>				
User Management: <a href="#">Alma and SIS Integration Enhancement</a>				
User Management: <a href="#">Update Externally-Managed Users in Alma</a>				
Resource Sharing: <a href="#">ISO ILL Based End-to-End Support</a>				
Resource Sharing: <a href="#">Enhanced Receive Options</a>				
Resource Sharing: <a href="#">Enhanced Return Options</a>				

Feature	No Activation/ Setup Required <small>(Note: Automatically visible to all users with the appropriate user role/permission)</small>	Activation/ Setup Required	Visible to Administrator Only	Contact Ex Libris to Activate This Feature
Analytics: <a href="#">E-Inventory Data Exposed in Analytics</a>				
System Enhancements: <a href="#">Improved Caching of JavaScript and CSS Files</a>				

# Data Services

The Alma May Central KnowledgeBase and Community Zone package has been applied to the Alma production environment.

## New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 13-April-2013 through 9-May-2013:

- Hein Online American Association of Law Libraries
- ProQuest Wall Street Journal Collection New Platform
- Chadwyck African Writers Series
- ebrary Open Access Breast Cancer Information Center
- ebrary OA Cyberbullying Information Center
- ebrary Open Access Bible Study Guide Commentary Series
- ebrary Open Access Natural Disaster Extreme Weather Information Center
- ebrary Open Access H1N1 Influenza Information Center
- Knovel Engineering Management & Leadership
- Karger Books 2013
- Royal Society of Chemistry eBook Collection 2013
- Sage Royal Society of Medicine
- Sage Reference Online 2012 Handbook Collection
- Taylor & Francis Humanities and Social Science Ebooks
- Sage CRKN Collection 2013
- Project Muse eBooks 2013
- ProQuest National Newspapers Core Collection New Platform

# Alma Show Me How

The following sections describe Alma Show Me How for the May 2013 release of Alma.

## Alma Show Me How – May

### Description

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

### Technical Instructions

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

#### To access Show Me How:

- 1 From the Alma home page, click the **Show Me How** button.  
The How Can We Assist You? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.  
For the May release, the following Show Me How scenarios are available:
  - New Icon for Rush Orders
  - Search for Records that Have No Inventory
  - Bulk Processing of Holding Records
  - Withdraw Items & Delete Associated Records
  - Direct Linking to Electronic Resources
  - Delete a Purchase Order
  - Prevent Renewal of a Requested Item
  - Reassign a Record or Release Assignment

# Acquisitions

The following sections describe the features provided for the Acquisitions component in the May 2013 release of Alma.

## Visual Indicator for Rush Orders

### Description

With the May release, a visual indicator has been added to all task lists and PO line details in Alma for rush orders. See below for an example of the symbol/visual indicator used for rush orders.

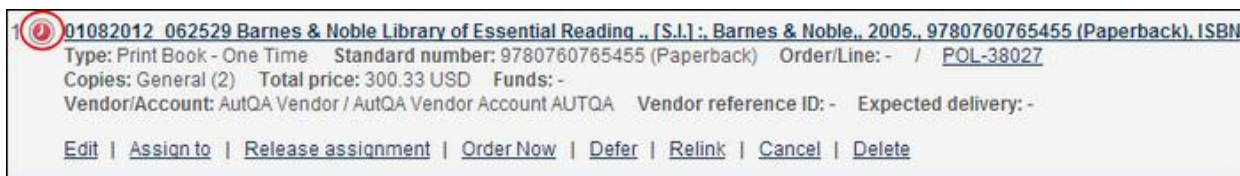


Figure 1 - Rush Order Symbol/Visual Indicator

# Resource Management

The following sections describe the functions provided for the Resource Management component in the May 2013 release of Alma.

## Advanced Search Enhanced with Has Inventory Condition

### Description

The purpose of this enhancement is to provide the capability to find records that have or do not have intellectual entities of any type (physical, electronic, or digital) or to find holdings without items. This is possible with the addition of the new **Has inventory** and **Has items** advanced search conditions.

### Technical Instructions

Anyone who can perform a repository search can access this new feature.

**To find records that have or do not have intellectual entities of any type (physical, electronic, or digital) using the Has inventory condition:**

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Click **Advanced search**.
- 3 Confirm that your Find option is set to **All Titles** and click **Add Conditions**.
- 4 Select the **Has inventory** condition, and click **Add Conditions**.

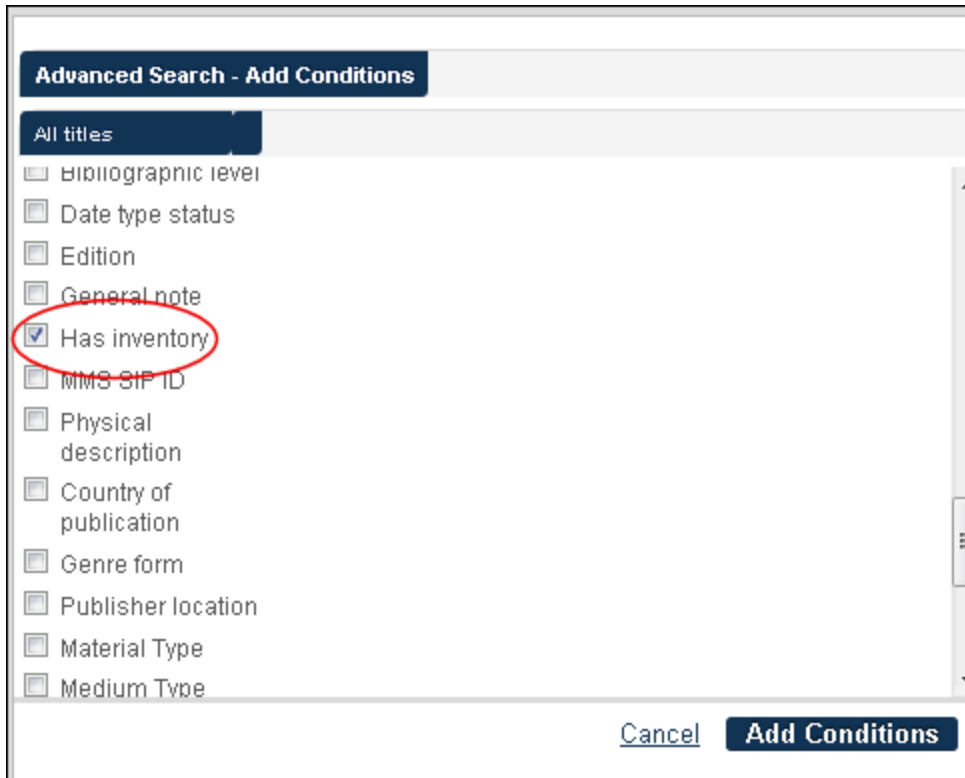


Figure 2 - Has Inventory Advanced Search Condition

5 Specify **Yes** or **No** for the **Has inventory** (equals) condition.

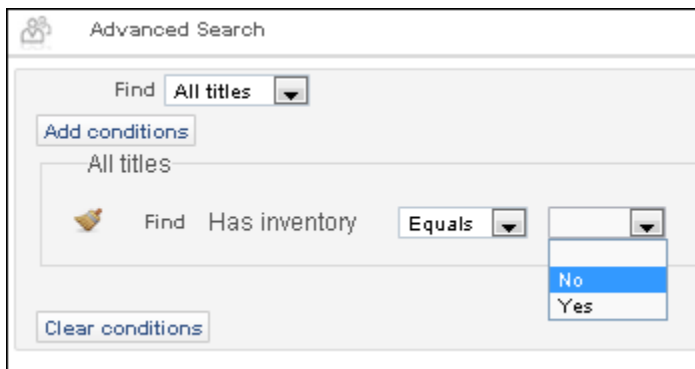


Figure 3 - Has Inventory Yes/No Option (All Titles Advanced Search)

6 Click **Go**.

The search results display.

**To find holdings without items using the Has items condition:**

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Click **Advanced search**.

- 3 Confirm that your Find option is set to **Physical Titles** and click **Add Conditions**.
- 4 Select the **Has items** condition, and click **Add Conditions**.

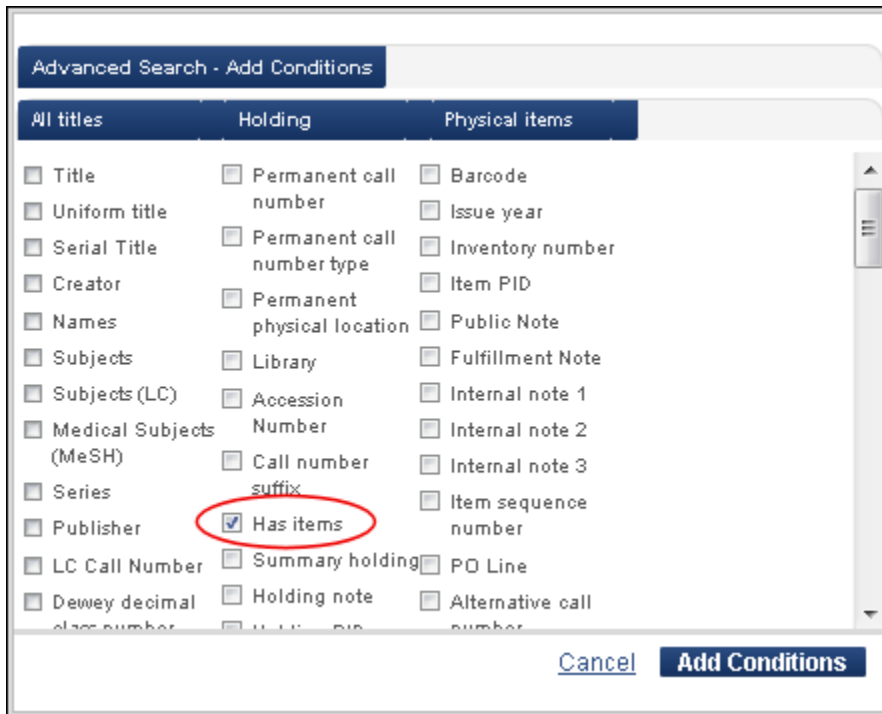


Figure 4 - Has Items Advanced Search Condition (Physical Titles/Holdings Column)

- 5 Specify **Yes** or **No** for the **Has items** (equals) condition.

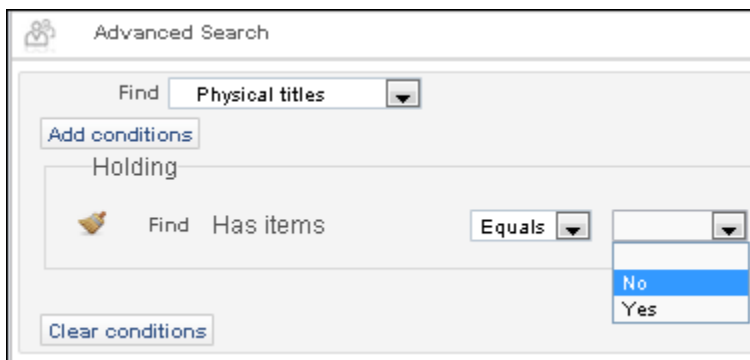


Figure 5 - Has Items Yes/No Option (Holdings)

- 6 Click **Go**.

The search results display.



# Global Changes – Bulk Processing of Holdings Records

## Description

The purpose of this enhancement is to provide the capability to update holdings information for a physical set of items or a physical set of titles.

## Technical Instructions

The following roles can access this facility:

- Catalog Manager
- Repository Manager

**To run the process to update holdings information:**

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 From the Filter drop-down list, select **Information Update**.

The Create Process – Select Process to Run page displays.

- 3 Select the **Change holdings information** process and click **Next**.

This is the first step of the Create Process wizard.

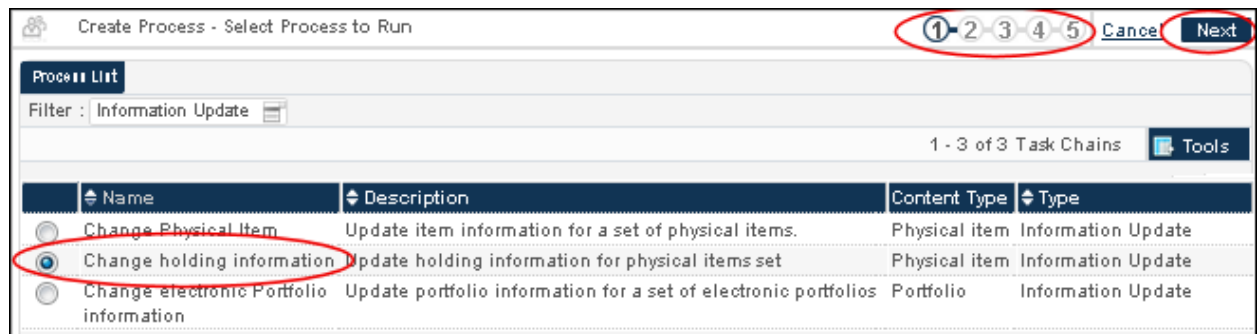


Figure 6 - Change Holdings Information Option

- 4 Select the set to process and click **Next**.

**Note:** This is a set that you previously created via Resource Management > Manage Sets > Add Set specifically for the purpose of changing holdings information related to the content of the set.

The Create Process – Enter Task Parameters page displays. You may select the following processing parameters to be used when the process is run:

- Library/location (specifying a location from the drop-down list is required when a library is selected)
- Update call number from the bibliographic record
- Correct the data using normalization rules (select from a list of previously created normalization rules set up through the MD Editor > Rules tab)
- Suppress record(s) from publishing/delivery (set management tag suppression)

Create Process - Enter Task Parameters

1 2 3 4 5 Back Cancel Next

Task Parameters: Change holding information

Apply only for Library

location

☐ Update call number from Bibliographic record

☐ Correct the data using normalization rules

☐ suppress record/s from publish/delivery

Figure 7 - Change Holdings Information Task Parameters

- 5 Click **Next**.
- 6 Schedule the process and click **Next**.
- 7 Review and confirm the process that you have created and click **Save**.

Create Process - Review and Confirm

12345
Back Cancel Save

General Information

Process Name CC PI Set Process

Task Parameters: Change holding information

Apply only for Library Art Library
location Ballet Music Collection

false Update call number from -  
Bibliographic record

false Correct the data using -  
normalization rules

true suppress record/s from -  
publish/delivery

Set Information

Set ID 426797210000121
Name CC PI Set

Scheduling

Schedule As soon as possible

Back Cancel Save

**Figure 8 - Review and Confirm Process Parameters**

After the process is run, the process report identifies how many records were updated, normalized, suppressed, and whether any failed.

## Withdraw Items Process Task Parameters Enhanced

### Description

The purpose of this enhancement is to provide an additional task parameter for the Alma process to withdraw items. With the May release, the **Delete childless holdings and bibliographic records** parameter has been added as an option for the withdraw items process.

### Technical Instructions

The following roles can access this facility:

- Physical Inventory Operator
- Repository Manager

- Purchasing Operator
- Purchasing Manager

**To create a withdraw items process using the new Delete childless holdings and bibliographic records parameter:**

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 From the Filter drop-down list, select **Withdraw**.
- 3 From the Create Process wizard, select the **Withdraw items** process and click **Next**.
- 4 Select the set, previously created, for withdrawing items and click **Next**.

The task parameters for withdraw items display. New in May is the option to **Delete childless holdings and bibliographic records**.



Create Process - Enter Task Parameters

Task Parameters: Withdraw items

How to handle childless holdings and bibliographic records? \*

- ☐ Do nothing
- ☒ Delete childless holdings and bibliographic records
- ☐ Suppress childless holdings and bibliographic records
- ☐ Delete childless holdings and suppress bibliographic records

Figure 9 - Withdraw Items New Task Parameter

- 5 Select the **Delete childless holdings and bibliographic records** parameter and click **Next**.
- 6 Schedule the process and click **Next**.
- 7 Review and confirm the process you have created and click **Save**.

**Note:** Related to the deletion process are the **suppressBibWithDeletedHol** and **suppressBibWithSuppressedHol** parameters when they are set to **true**. These are set in Resource Management > Resource Configuration > Configuration Menu > General > Other Settings. Refer to the user's guide or online help for additional details.

## NLM MeSH Available in the MD Editor

### Description

The purpose of this enhancement is to provide the ability to create or edit records in the MD Editor and access NLM MeSH headings records in the Community Zone (CZ).

## Technical Instructions

The following roles can access this facility:

- Cataloger
- Catalog Administrator

### To create a record using NLM MeSH records from the Community Zone:

- 1 From the Alma main menu > Resource Management > Cataloging, click **Open Metadata Editor**.

The MD Editor page opens and displays NLM Mesh under the Records tab.

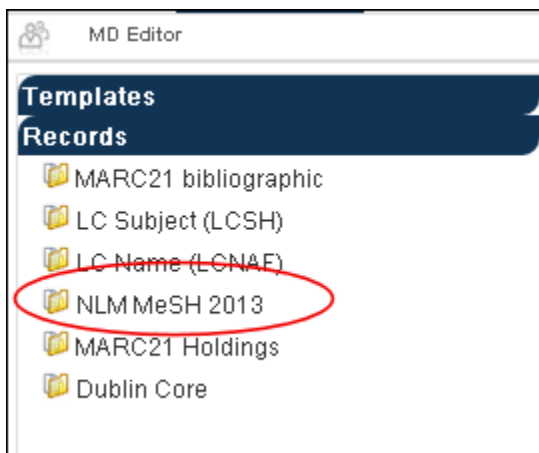


Figure 10 - NLM MeSH

- 2 Click **File > New > NLM MeSH**.
- 3 Begin entering content for the 650 tag (with a second indicator of 2) to view an example of the Community Zone NLM MeSH headings records.



Figure 11 - Community Zone NLM MeSH Headings Records

- 4 Select the headings option you prefer from the Community Zone NLM MeSH list.

The remainder of the 650 tag is entered automatically.

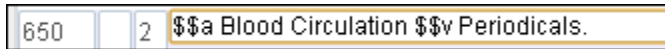


Figure 12 – 650 Tag Completed with NLM MeSH Headings Record from the CZ

- 5 Save the record.

## Incremental Updates Enhancement to Portfolio Loader

### Description

The purpose of this enhancement is to provide additional flexibility for managing electronic portfolios of a specific package. Until now, it was only possible to load a file that represented the complete portfolio list available via the package and based on that file, update, delete, and/or add portfolios. With the May release, it is possible to load a file that includes only the incremental changes to the portfolio list of a specific package.

### Technical Instructions

The Electronic Inventory Operator role can access this capability.

#### To process an incremental loading of multiple portfolios:

- 1 Navigate to the Alma package service editor via the electronic collection repository search result and click **Edit Service**.

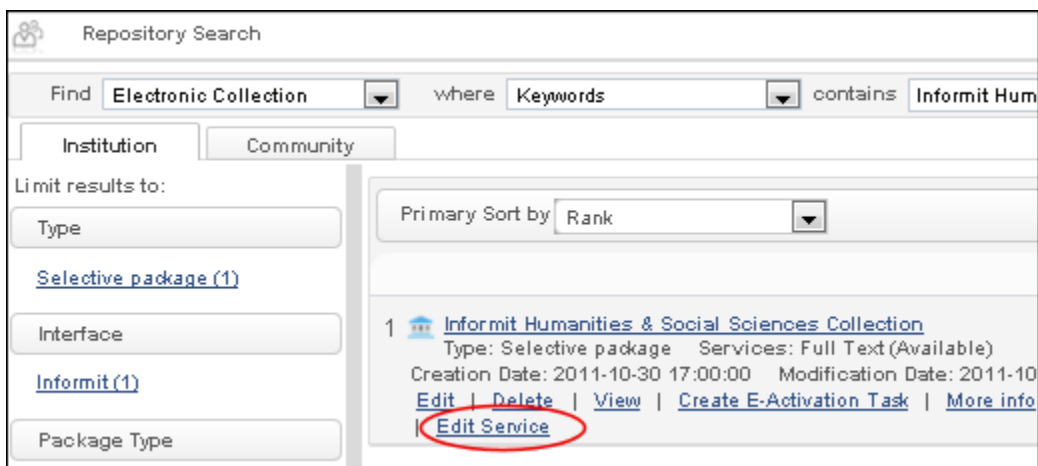


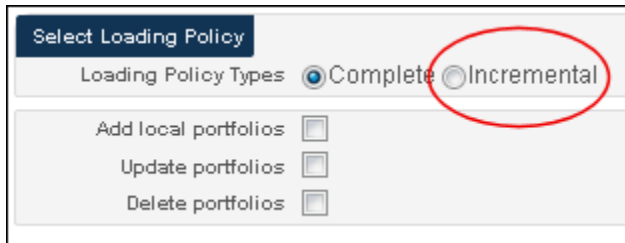
Figure 13 - Package Edit Service

The Electronic Service Editor page displays.

- 2 Click the **Portfolios** tab.
- 3 Click the **Load Portfolios** button.

The File Upload activation wizard page displays.

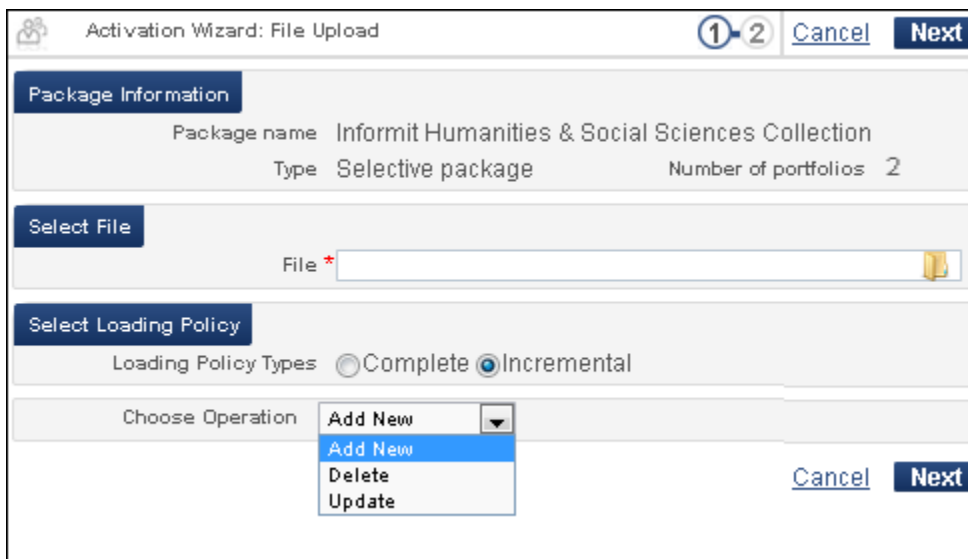
The new Incremental option displays in the Select Loading Policy section.



The screenshot shows a section titled "Select Loading Policy". Below the title, there are two radio buttons: "Complete" and "Incremental". The "Incremental" radio button is selected and is circled in red. Below the radio buttons, there are three checkboxes: "Add local portfolios", "Update portfolios", and "Delete portfolios". All three checkboxes are currently unchecked.

**Figure 14 - Incremental Option**

- 4 Select the **Incremental** option.
- The page refreshes to display the Choose Operation option.
- 5 Choose an incremental option from the **Choose Operation** drop-down list.
- You can select Add New, Delete, or Update.



The screenshot shows the "Activation Wizard: File Upload" page. At the top, there are two tabs: "1" and "2", with "2" being the active tab. There are "Cancel" and "Next" buttons. Below the tabs, there is a "Package Information" section with the following details: "Package name: Informit Humanities & Social Sciences Collection", "Type: Selective package", and "Number of portfolios: 2". Below this is a "Select File" section with a "File \*" input field and a folder icon. Below that is a "Select Loading Policy" section with two radio buttons: "Complete" and "Incremental". The "Incremental" radio button is selected. Below the radio buttons is a "Choose Operation" section with a drop-down menu. The drop-down menu is open, showing three options: "Add New", "Delete", and "Update". The "Add New" option is highlighted. There are "Cancel" and "Next" buttons at the bottom right of the page.

**Figure 15 - Incremental Drop-Down List Options**

The Add New, Delete, and Update options align with the types of files you receive from the vendor and the content of those vendor files. Refer to the table below for a description of each operation that you can select.

Operation	Description
Add New	This operation adds all portfolios that are listed (in the file provided) as new local portfolios to the package.
Update	This operation updates the details of all package portfolios that are listed in the file.
Delete	This operation deletes all package portfolios that are listed in the file (Whereas, for the Delete option under the complete loading policy type, portfolios are deleted from the package because they do not exist in the file after the system does a comparison between the file and the package portfolios.)

- Click **Next** and completed the remainder of the wizard process.

## Import Profile Enhanced with Dublin Core XML/Crosswalk Options

### Description

The purpose of this enhancement is to provide the capability to import Dublin Core XML (in the DSpace simple archive format) and use the crosswalk capability to automatically convert the imported XML to MARC21 bibliographic records. See below for an example of the XML structure/format.

```
<?xml version="1.0" encoding="utf-8" standalone="no"?>
<dublin_core schema="dc">
  <dcvalue element="contributor" qualifier="author" language="en_US">Stratton, Bessie Mabel</dcvalue>
  <dcvalue element="date" qualifier="accessioned">2013-04-09T18:31:21Z</dcvalue>
  <dcvalue element="date" qualifier="available">2013-04-09T18:31:21Z</dcvalue>
  <dcvalue element="date" qualifier="issued" language="en_US">1923</dcvalue>
  <dcvalue element="date" qualifier="submitted" language="en_US">1923</dcvalue>
  <dcvalue element="identifier" qualifier="other" language="en_US">b14742883</dcvalue>
  <dcvalue element="identifier" qualifier="uri">http://hdl.handle.net/2144/5364</dcvalue>
```



```

<dcvalue element="description" qualifier="none" language="en_US">Thesis (M.A.)--Boston
University</dcvalue>

<dcvalue element="description" qualifier="abstract" language="en_US">The new movement is
comparatively young in age, but it has brought a total upheaval of the whole art of the theatre within the
short span of its activity. /dcvalue>

<dcvalue element="description" qualifier="provenance" language="en">Made available in DSpace on
2013-04-09T18:31:21Z (GMT). No. of bitstreams: 3

Stratton_Bessie_1923_web.pdf: 5684141 bytes, checksum: 184c0c33dd90f652e4dde94e0b95cf73 (MD5)

Stratton_Bessie_1923_ocr.pdf: 5684679 bytes, checksum: 1b17257df86580edc77a8de9f7f6b10e (MD5)

Stratton_Bessie_1923_orig.pdf: 7289480 bytes, checksum: 09e299b47592b9e5b3f5213395acd718 (MD5)

Previous issue date: 1923</dcvalue>

<dcvalue element="language" qualifier="iso" language="en_US">en_US</dcvalue>

<dcvalue element="publisher" qualifier="none" language="en_US">Boston University</dcvalue>

<dcvalue element="rights" qualifier="none" language="en_US">Based on investigation of the BU
Libraries' staff, this work is free of known copyright restrictions</dcvalue>

<dcvalue element="title" qualifier="none" language="en_US">America and the new movement in the
theatre</dcvalue>

<dcvalue element="type" qualifier="none" language="en_US">Thesis/Dissertation</dcvalue>

</dublin_core>

```

## Technical Instructions

The existing roles for creating/managing import profiles remain the same.

### To create an import profile for importing Dublin Core XML:

- 1 From the Alma main menu > Resource Management > Resource Configuration, click **Configuration Menu**.
- 2 From the Record Import section, click **Import Profiles**.
- 3 Click the **Add New Profile** button.

The Import Profile Details page displays with the Repository selected as the default profile type.

Figure 16 - Dublin Core XML Import Profile Wizard Step 1

4 Click Next.

The Import Profile Details page displays.

Figure 17 - Import Profile Details Page

5 Enter the import profile details.

- a Enter the Profile Name (required).
- b Specify the Originating System from the drop-down list.
- c For Physical Source Format, select **Dublin Core XML** from the drop-down list.

Automatically, the Source Format defaults to **Dublin Core**, Crosswalk defaults to **Yes**, and Target Format defaults to **MARC21 Bibliographic**.

- d Complete the remaining options in the Profile Details section and click **Next**.

Import Profile Details

1 2 3 4 5 6 Cancel Save Draft Next

Profile Type Repository

Profile Details

Profile Name \* CC DC Import

Profile Description Dublin Core Import Profile

Originating System Other File name patterns

Physical Source Format Dublin Core XML Cross Walk No Yes

Source Format Dublin Core Target Format MARC21 Bibliographic

Load File Source Upload File/s Active True

Figure 18 - Dublin Core XML Physical Source Format Selected

- 6 Complete the remainder of the import profile wizard steps and click **Save** when you are finished.

For additional information regarding the import profile settings, refer to the online help or the *Alma Resource Management Guide*.

## Other Resource Management Enhancements

- Alma has been updated to enable successful repository search results for materials where staff may either include or omit articles in their search criteria. With the May release of Alma, materials are indexed with and without the articles to enable these results.
- Records have been converted from the ISBN-10 to the ISBN-13 format. The purpose of this enhancement is to provide consistent results when you need to match records on ISBN, as in the following examples:
  - Staff searches
  - Importing bibliographic records
  - UResolver matching
  - Portfolio loader
- For all publishing profiles that enable FTP (such as Primo, OCLC, and Libraries Australia), the availability of the FTP is now checked at the beginning of the job. If the FTP server is not available, the job is not started. (URM-19706)

# Fulfillment

The following sections describe the functions provided for the Fulfillment component in the May 2013 release of Alma.

## Direct Linking Configuration Enhancement

### Description

The purpose of this enhancement is to control the condition in which a patron is automatically directed to an electronic service via the UResolver.

### Technical Instructions

The Fulfillment Administrator role can configure direct linking.

#### To configure direct linking:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 From the Discover Interface Display Logic section, click **Direct Linking**.

The Direct Linking Configuration page displays.

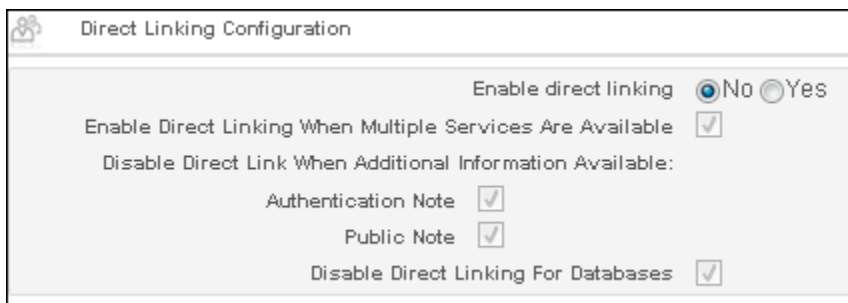


Figure 19 - Direct Linking Configuration Page

- 3 Select **No** to disable direct linking and present the user with the service options or select **Yes** to directly link to the service when there is only one option.

Additional options are available to select when you choose **Yes** for **Enable direct linking**.

**No** is the default option for **Enable direct linking**.

- 4 Click **Save**.

# New Hold Shelf Processing Option

## Description

The purpose of this enhancement is to provide additional processing options related to the hold shelf. For example, you may need to accept an item for the hold shelf but not put it on the hold shelf immediately due to additional processing that may be required or because the location of the hold shelf is not nearby.

With the May release, there is a new configurable option for receiving/scanning in items that allows you to place an item in the new Alma **Hold Shelf Processing** destination versus the **On Hold Shelf** destination.

---

**Note:** This new capability applies only to requests related to items processed after the implementation of the May release.

---

## Technical Instructions

The following roles can process and/or configure this new capability:

- Receiving Operator
- Fulfillment Services Operator
- Fulfillment Services Manager
- Fulfillment Administrator

### To configure the new Has hold shelf processing option:

- 1 From the Alma main menu > Fulfillment > Fulfillment Configuration, click **Configuration Menu**.
- 2 Select a library from the **You are configuring** drop-down list.
- 3 From the Library section, click **Circulation Desks**.
- 4 For a specific circulation desk from the Circulation Desks List section, click **Actions > Edit**.

Circulation Desks List

You are configuring: Music Library [Organization Unit List](#)

Circulation Desks List

Serviced Physical Location: Any Find: in: Name Go

Add Circulation Desk 1 - 1 of 1 Records Tools

Code	Name	Description	Primary	Supports Digitization	Actions
Music	Music	-		✓	

Back

Figure 20 - Edit a Specific Circulation Desk Configuration (Actions > Edit)

- From the Hold Shelf Information section on the General Details tab, select the **Has hold shelf processing** option.

Circulation Desk - General Information

You are configuring: Music Library

General Details Physical Locations Operators Automatic Printing

General Details

Code \*Music

Name \*Music

Primary ☐ Reading room desk ☒

Picks from shelf ☒

Additional Information

Description

Map

Printing Information

Printer

Creates return receipts ☐

Hold Shelf Information

Has hold shelf ☒

Notify patron of canceling expired hold ☒

Has hold shelf processing ☒

Hold shelf sorting Request

Maximum time on hold shelf 5 (Days)

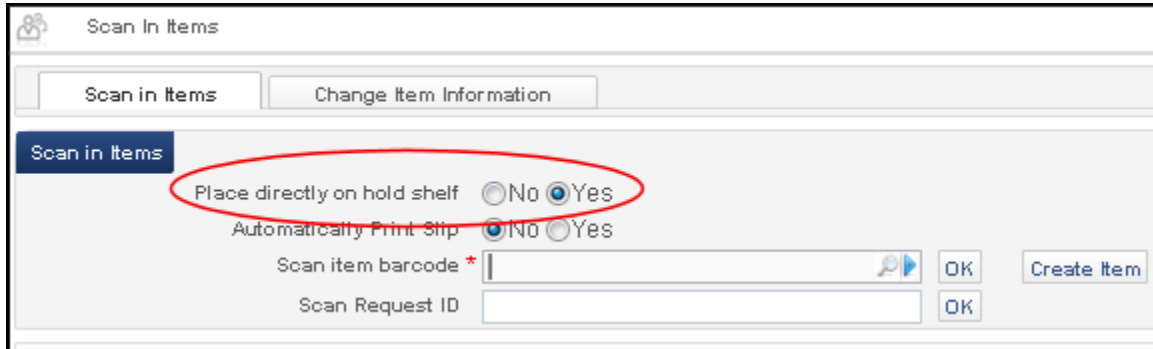
Figure 21 - Has Hold Shelf Processing Option

- Click **Save**.

### To place an item in the Has hold shelf processing destination:

- 1 Scan in an item (from any of the places where this capability in Alma exists).

The **Place directly on hold shelf** option displays.



Scan In Items

Scan in Items | Change Item Information

Scan in Items

Place directly on hold shelf ☐ No ☒ Yes

Automatically Print Slip ☒ No ☐ Yes

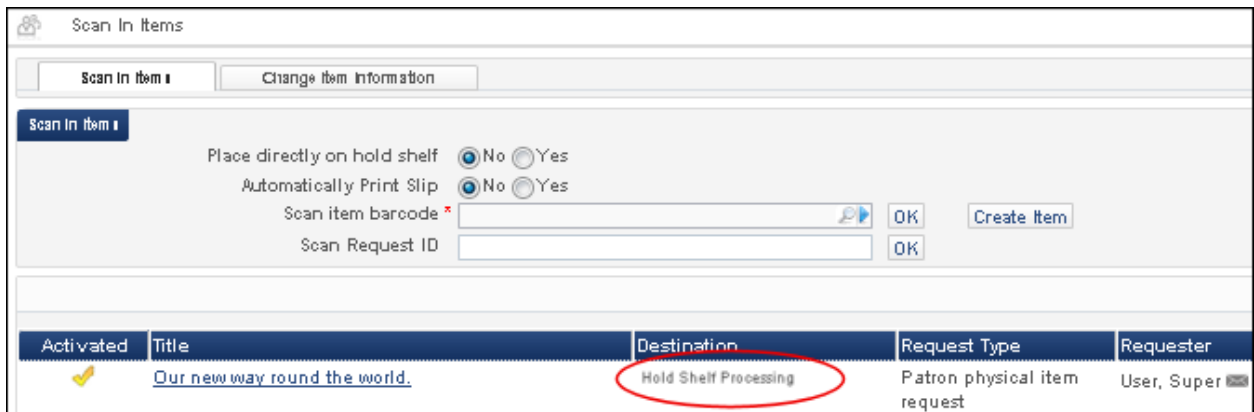
Scan item barcode \*

Scan Request ID

Figure 22 - Place Directly on Hold Shelf Example

- 2 For the **Place directly on hold shelf** option, select No.
- 3 Scan in the item barcode and click OK.

The item has a destination of Hold Shelf Processing.



Scan In Items

Scan in Items | Change Item Information

Scan in Items

Place directly on hold shelf ☒ No ☐ Yes

Automatically Print Slip ☒ No ☐ Yes

Scan item barcode \*

Scan Request ID

Activated	Title	Destination	Request Type	Requester
	<a href="#">Our new way round the world.</a>	Hold Shelf Processing	Patron physical item request	User, Super

Figure 23 - Hold Shelf Processing Destination

### To move the item from the Has hold shelf processing destination to the On hold shelf destination:

- 1 Scan in the same item.

The **Place directly on hold shelf** option displays.

Scan In Items

Scan in Items    Change Item Information

Scan in Items

Place directly on hold shelf    ☐ No ☒ Yes

Automatically Print Slip    ☒ No ☐ Yes

Scan item barcode \*

Scan Request ID

Figure 24 - Place Directly on Hold Shelf Example

- 2 For the **Place directly on hold shelf** option, select **Yes**.
- 3 Scan in the item barcode and click **OK**.

The item has a destination of On Hold Shelf.

Scan In Items

Scan in Items    Change Item Information

Scan in Items

Place directly on hold shelf    ☒ No ☐ Yes

Automatically Print Slip    ☒ No ☐ Yes

Scan item barcode \*

Scan Request ID

Activated	Title	Destination	Request Type	Requester
	<a href="#">Our new way round the world.</a>	On Hold Shelf	Patron physical item request	User, Super

Figure 25 – On Hold Shelf Destination

**Note:** Regardless of the destination specified (On Hold Shelf or Hold Shelf Processing), the process type where the hold shelf information can be viewed, such as Fulfillment > Resource Requests > Monitor Requests & Work Orders, will indicate On Hold Shelf.

Barcode: 34-10  
 Managed By Library: Main Library    Managed By Desk: Mai  
 Process: On Hold Shelf    Process Status: In Process    Pro  
 Request Type: Patron physical item request

## Transfer Requests

### Description

The purpose of this enhancement is to provide the ability to transfer all resource requests from the responsibility of one circulation desk to the responsibility of another circulation desk. All



requests that are assigned one circulation desk may be reassigned to another desk, regardless of the request's step type (pickup from shelf, hold shelf, and so forth).

## Technical Instructions

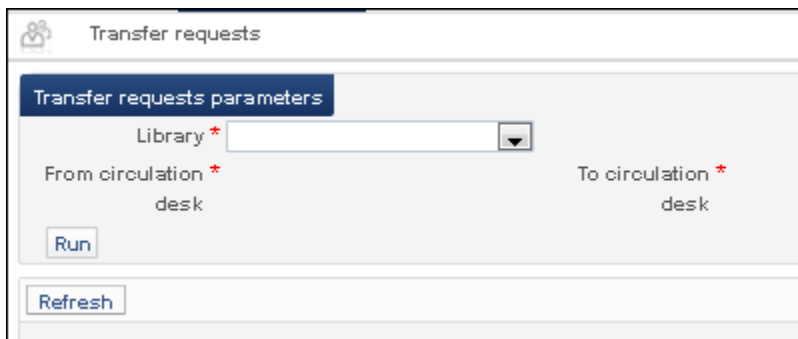
The following roles can access this facility:

- Fulfillment Services Manager
- Fulfillment Administrator

### To transfer all requests from one circulation desk to another circulation desk:

- 1 From the Alma main menu > Fulfillment > Advanced Tools, click **Transfer requests**.

The Transfer Requests page displays.

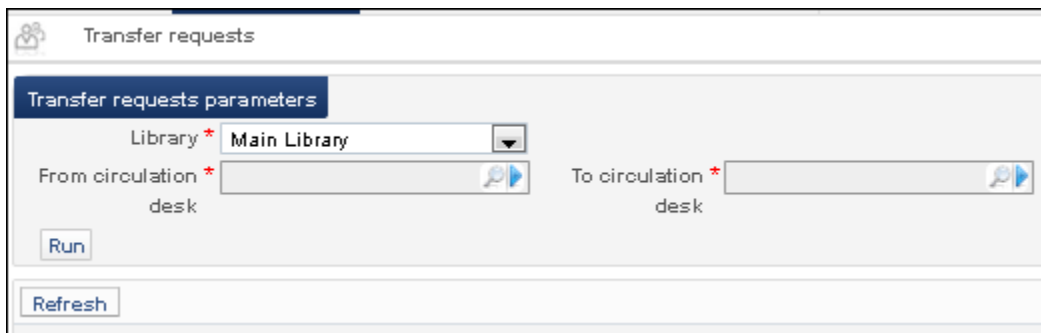


The screenshot shows the 'Transfer requests' page. At the top is a header with a group icon and the text 'Transfer requests'. Below this is a section titled 'Transfer requests parameters'. It contains three dropdown menus: 'Library \*', 'From circulation \* desk', and 'To circulation \* desk'. The 'Library \*' dropdown is currently empty. Below the dropdowns are two buttons: 'Run' and 'Refresh'.

Figure 26 - Transfer Requests Page

- 2 Select a library from the drop-down list.

The display refreshes and opens with From and To circulation desk options.



The screenshot shows the 'Transfer requests' page after a library has been selected. The 'Library \*' dropdown now shows 'Main Library'. The 'From circulation \* desk' and 'To circulation \* desk' dropdowns are now active and show a search icon (magnifying glass) and a blue arrow icon. The 'Run' and 'Refresh' buttons are still present at the bottom.

Figure 27 - From/To Circulation Desk Options

- 3 For the requests to be moved, specify a circulation desk in the **From circulation desk** parameter.

- 4 Select a **To circulation desk**.
- 5 Click **Run**.

When completed, the job report indicates how many requests were moved to the new location and how many requests failed to move.

---

**Note:** The **To circulation desk** needs to be configured similar to the **From circulation desk** in order to be able to handle the requests being moved to it. For example, On Hold Shelf requests cannot be moved to a desk that is not configured to have a hold shelf. The failure of some requests to move from one circulation desk to another may be due to inconsistencies in the configuration settings.

---

# General

The following sections describe the functions provided for the General component in the May 2013 release of Alma.

## Integration System Type

### Description

The purpose of this change is to gather information regarding the type of external system that is related to the integration type that you are configuring.

### Technical Instructions

Any role that can configure external systems can access this facility.

#### To specify system type information:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 2 From the External Systems section, click **External Interfaces**.
- 3 Click the **Add External System** button.
- 4 Select one of the following options from the **Integration Type** drop-down list.
  - Bursar
  - LDAP
  - Payment
  - Self Check
  - User

The page refreshes to display the **System (for Ex Libris' informational purposes)** option.

External System

Code - Name - Integration Type -

External System

Code \*  Name \*

Integration Type \* **Payment** S/FTP Connection Type \* **Export FTP**

System (for Ex Libris' informational purposes)

Default ☐

Description

Figure 28 - System Informational Option

- 5 From the **System (for Ex Libris' informational purposes)** drop-down list, select the type of external system for which you are creating this external system profile.

The options in the **System (for Ex Libris' informational purposes)** drop-down list vary based upon the integration type that you selected previously.

---

**Note:** The **System (for Ex Libris' informational purposes)** field is for informational gathering purposes only.

---

- 6 Complete the remainder of the External System wizard and click **Save**.

# User Management

The following sections describe the functions provided for User Management in the May 2013 release of Alma.

## Alma and SIS Integration Enhancement

### Description

The purpose of this enhancement is to provide additional integration support between Alma and the SIS (Student Information System) to enable blocking a student in the SIS from certain activities until the blocked student clears any outstanding business with the library.

This is handled by exporting, from the Alma system, users that have certain blocks (or any block) or owe the library a certain amount. The following are configurable parameters in the integrations/export profile:

- Block types
- User groups
- Fine/Fee age (days)
- Threshold amount (owes money)
- FTP profile and file path
- Schedule (run as soon as possible or nightly, for example)

### Technical Instructions

The General System Administrator role can configure the export profile in Alma.

#### To configure the export profile in Alma for user blocks in the SIS:

- 1 From the Alma main menu > General > General Configuration, click **Configuration Menu**.
- 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 Complete the required fields (refer to the figure below).

External System

Code \* USR\_BLOCK Name \* User Block Export Integration Type \* User S/FTP Connection Type \* SIS\$Submission Integration System Type \* Banner

Description

Created By Ex Libris (10/04/2013) Updated By Ex Libris (10/04/2013)

Figure 29 - User Block Export Configuration

5 Click Next.

6 Enter the export parameters (refer to the figures below).

Export

Active \* ☒ Active ☐ Non Active

Plugin \* ExternalSystemUserXmlToXmlPlugin

User ID Type \* Primary Identifier

User Groups \*

Block Types \*

Fine/Fee Age(days)

Threshold Amount \*

Output File Path \*

Schedule Not scheduled

Figure 30 - Export Parameters

	Code	Description
<input type="checkbox"/>	LOAN	Loan
<input type="checkbox"/>	ILL	Resource Sharing Requests
<input type="checkbox"/>	GENERAL	General
<input type="checkbox"/>	USER	User
<input type="checkbox"/>	CASH	Cash

Figure 31 - Select One or More Block Types

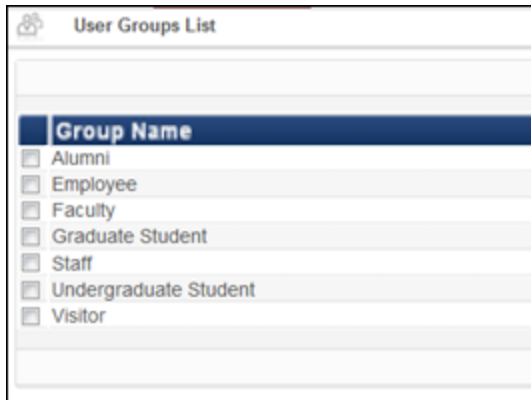


Figure 32 - Select One or More User Groups

7 Click **Save**.

## Update Externally-Managed Users in Alma

### Description

The purpose of this enhancement is to provide additional flexibility for managing/editing user information dynamically for externally managed users between the normally scheduled SIS synchronization update jobs.

### Technical Instructions

The User Manager role can access this editing capability.

#### To edit externally-managed users in Alma:

- 1 From the Alma main menu > General > User Management, click **Find and Manage Users**.
- 2 From the **Account Filter** drop-down list, select **External users**.
- 3 For a specific student, click **Actions > Edit**.
- 4 Click the **Open For Update** button.

The screenshot shows the 'User Details' form for a user named Stan Baker. The form includes fields for Name, Account Type (External), Primary identifier (X1), Record type (Public), and User group (STUDENT\_UNDERGRADUATE). There is a link to 'Manage fulfillment activities'. Below these fields are tabs for General Information, Contact Information, Identifiers, Notes, Blocks, Fines/Fees, Statistics, and Attachments. The 'Identifiers' tab is active, showing a table with one record: a Barcode with value X1, created by Ex Libris on 17/07/2011. The 'Open For Update' button is circled in red at the top right and bottom right of the form.

Figure 33 - Open for Update Button

**Note:** This button is new with the May release.

You are prompted with the following message.

The screenshot shows a 'Confirmation Message' dialog box. The message text reads: 'User information is externally owned and will be overridden by next synchronization. Continue?'. At the bottom right, there are 'Cancel' and 'Confirm' buttons. The 'Confirm' button is highlighted with a yellow border.

Figure 34 - External Sync Confirmation Message

- 5 Click **Confirm** to acknowledge that the edits you perform may be overridden by the next SIS synchronization job run.
- 6 Proceed with making your changes and click **Save**.

## Other User Management Enhancements

- The SIS loader identifier uniqueness checks have been enhanced to cover and report previously unattended errors.
- The **In** drop-down list on the Find and Manage Users page (part of the user search options) now contains the **Primary identifier** option instead of User name.



# Resource Sharing

The following sections highlight the updates to Resource Sharing for May 2013.

## ISO ILL Based End-to-End Support

### Description

With the May release, Alma provides the capabilities to process the full set of resource sharing activities and manage the communications with resource sharing partners using the following ISO ILL messages:

- ILL Request
- Shipped
- Received
- Returned

With ISO ILL support (for these messages), Alma can participate in a full ISO-based transaction as either a borrower (see [Borrower Side](#)) or as a lender (see [Lender Side](#)). Refer to the [Technical Instructions](#) below for a description of how to configure ISO-based resource sharing.

### Borrower Side

The borrower side process/workflow is as follows:

- 1 A request may be created from Primo GetIt or from Alma in the same way that it has been done until now. Selecting an ISO partner (refer to the [Technical Instructions](#) below for configuration information) and using the Send option in the borrowing requests task list or the borrowing request form results in a request being sent in ISO format to the selected partner.
- 2 When receiving a Shipped ISO message from the lender, the request status is automatically changed to Shipped (Physically or Digitally).
- 3 When receiving the shipped material, either in digital format or in physical format (refer to [Enhanced Receive Options](#)), a Received ISO message is sent to the selected partner.
- 4 When sending physical materials back to the lender (refer to [Enhanced Return Options](#)), a Return ISO message is sent to the selected partner.

## Lender Side

The lender side process/workflow is as follows:

- 1 When an ISO ILL Request message is received, a lending request is automatically created for the requesting partner in the lending requests task list.
- 2 When the item is shipped to the requesting partner in physical or in digital format, a Shipped message is sent to the borrower.
- 3 When the Received ISO message is received by the lender, the request status automatically changes to Received by partner. If the shipment has been done in digital format, the request is closed.
- 4 When the Returned ISO message is received by the lender, the request status automatically changes to **Request completed** or to **Returned by partner**, depending on the Alma Workflow Profile settings. (Refer to [Enhanced Return Options](#) in this section for additional information.)

## Technical Instructions

The following roles can configure resource sharing tasks:

- Fulfillment Services Manager
- Fulfillment Administrator

### To configure ISO ILL partners in Alma:

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

The Resource Sharing Partner page displays with the following tabs:

- General Information
  - Contact
  - Parameters
- 4 Enter a partner **Code** and **Name** (required).

The name that you enter displays wherever a partner is selected.

- 5 From the Profile Type drop-down list, select **ISO**.

The following resource sharing profile types are supported:

- ARTEmail (British Library peer-to-peer resource sharing model)
- ISO (ILL peer-to-peer resource sharing model)
- NCIP (broker-based resource sharing model)

- 6 Complete the remainder of the information on the **General Information** tab.

Select the appropriate check boxes to indicate if the partner you are configuring provides either lending or borrow services or both of these services. When you select Supports Borrowing or Supports Lending, you are prompted to select a Borrowing or Lending Workflow respectively (see the figure below).

These workflows identify the resource sharing steps/activities that are supported. Multiple workflow profiles can be configured since different resource sharing partners may support different borrowing and lending steps/activities. The resource sharing workflow profiles can be configured in Alma main menu > Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles. See below for examples of workflow profiles and supported steps that have been configured.

The screenshot shows the 'Resource Sharing Partner' configuration form. The 'General Information' tab is selected. The form contains the following fields and values:

- Partner Code: CC\_ISO
- Partner Name: CC University (ISO)
- Profile Type: ISO (selected from a dropdown)
- Status: Active (selected from a dropdown)
- Average Supply Time: 1
- Delivery Delay: 1
- Currency: (empty field)
- Supports Borrowing: ☒
- Supports Lending: ☒
- Borrowing Workflow: Borrowing Workflow (selected from a dropdown, circled in red)
- Lending Workflow: Lending Workflow (selected from a dropdown, circled in red)

Figure 35 - Borrowing and Lending Workflows Identified for a Specific Partner

Workflow Profiles				Cancel
Add Workflow Profile				Tools
Workflow Profile	Type	Steps		
B1	Borrowing	Recalled by partner	Actions	
B2	Borrowing	Cancel requested, Renew requested	Actions	
B3	Borrowing	Cancel request not accepted, Cancel requested, Cancelled by partner, Declared lost by partner, Declared overdue by partner, Overdue/Renew, Renew requested, Renewed by partner, Report damaged item to partner, Report lost item to partner, Request accepted	Actions	
Borrowing Workflow	Borrowing	Request accepted, Cancel requested, Cancelled By Patron, Cancelled by partner, Declared lost by partner, Lender check in, Overdue/Renew, Recalled by partner, Renew requested, Renewed by partner, Report lost item to partner	Actions	
Lending Workflow	Lending	Cancel reply, Lender check in, Rejected the borrower request	Actions	

Figure 36 - Workflow Profile Borrowing and Lending Steps/Activities Configured

These steps become apparent in the status information that displays for borrowing and lending tasks (see the figure below).

Resource Sharing Borrowing Requests

Cancel request not accepted

Change Status

Status: All Partner: All Need patron information:

Add

☐ Select All

1

☐ The Beat! Book (2009)  
ISBN: 1-60473-241-5  
Status: Returned by patron  
Needs patron information: 29/10/2012  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Return](#)

2

☐ TEST Book  
Status: Created borrowing request  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Return](#)

3

☐ chen test Book  
Status: Report lost item to partner  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Return](#)

4

☐ chen test2 Book  
Status: Created borrowing request  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send query to patron](#) | [Return](#)

5

☐ chen test 3 Book  
Status: Returned item to partner  
[Edit](#) | [Duplicate](#) | [Send query to patron](#) | [Return](#)

6

☐ WWII, Economic Views Book By Alice King (2001)  
Status: Request sent to partner  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Return](#)

Cancel request not accepted

Cancel request not accepted

Cancel requested

Cancelled By Patron

Cancelled by partner

Created borrowing request

Declared lost by partner

Declared overdue by partner

Lender check in

Loaned item to patron

Overdue/Renew

Recalled by partner

Renew request not accepted

Renew requested

Renewed by partner

Report damaged item to partner

Report lost item to partner

Request Completed

Request accepted

Request sent to partner

Returned by patron

Figure 37 - Workflow Profile Steps Apparent in the Borrowing/Lending Status Information

- 7 Enter the partner contact information on the **Contact Information** tab.
- 8 For ISO partners, enter the following information in the **Parameters** tab:
  - a ILL Server – the partner’s server name (or IP)
  - b ILL Port – the partner’s ILL port number
  - c ISO Symbol – the symbol by which the ILL partner is known
- 9 Optionally, select **Supports ADD Address** if this applies to the ISO ILL partner that you are configuring.

Selecting this option causes the requester's email to be included in the ILL request. This enables the lending partner to send the shipped resource directly to the requester.

- 10 Click **Save**.

## Enhanced Receive Options

The purpose of this enhancement is to provide additional flexibility on the borrowing side when receiving resource sharing requested materials. With the May release, the following processing options have been added:

- Receiving can be handled as a row action for a specific request in the borrowing requests task list in addition to the Scan In Items option previously available.

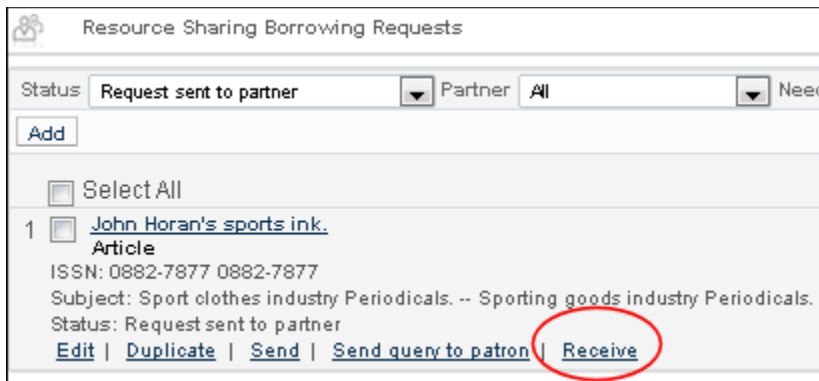


Figure 38 - Receive Row Action

- Receiving can be handled from the new **Receiving Items** option (Alma main menu > Fulfillment > Resource Sharing > Receiving Items)

Figure 39 - Resource Sharing Receiving Items Option

Regardless of which method you choose to receive resource sharing materials, you can identify the format as either digital or physical.

- Physical – When you receive and identify the format of an item as physical, you are given the option to enter the temporary barcode (external identification).
- Digital – When you receive and identify the format of an item as digital, you can close the request or maintain it in the Resource Sharing Borrowing Requests task list as **Digitally received by library**. The email address of the requesting patron is displayed for processing.

Figure 40 - Digitally Received by Library Status

Using any of the Alma receive options will, in addition to updating the request's status, send the ISO Receive message when the lender is identified as an ISO resource sharing type of partner.

## Enhanced Return Options

The purpose of this enhancement is to provide additional flexibility for returning physical materials to the lender. With the May release, a borrower can return physical materials back to the lender using a Return row action in the borrowing requests task list, in addition to using the Scan In Items interface previously available.

Resource Sharing Borrowing Requests

Status: All Partner: All

Add

☐ Select All

1 ☐ The Beat!  
Book (2009)  
ISBN: 1-60473-241-5  
Status: Returned by patron  
Needs patron information: 29/10/2012  
Edit | Cancel | Duplicate | Send query to patron | Return

Figure 41 - Return Row Action

When a patron returns the borrowed item, the request status is set to **Returned by patron**.

Resource Sharing Borrowing Requests

Status: All Partner: All Need:

Add

☐ Select All

1 ☐ The Beat!  
Book (2009)  
ISBN: 1-60473-241-5  
Status: Returned by patron  
Needs patron information: 29/10/2012  
Edit | Cancel | Duplicate | Send query to patron | Return

Figure 42 - Returned by Patron Status Message

When the borrowing library returns the item, the return status updates are handled in the following manner:

- If the borrowing Workflow Profile for the partner includes the **Lender check in** option, the request status is changed to **Returned item to partner**. When an indication arrives from the lender that the resource was, in fact, received, the request on the borrowing side is closed.

Workflow Profiles			Cancel
Add Workflow Profile			Tools
Workflow Profile	Type	Steps	
B1	Borrowing	Recalled by partner	Actions
B2	Borrowing	Cancel requested, Renew requested	Actions
B3	Borrowing	Cancel request not accepted, Cancel requested, Cancelled by partner, Declared lost by partner, Declared overdue by partner, Overdue/Renew, Renew requested, Renewed by partner, Report damaged item to partner, Report lost item to partner, Request accepted	Actions
Borrowing Workflow	Borrowing	Request accepted, Cancel requested, Cancelled By Patron, Cancelled by partner, Declared lost by partner, Lender check in, Overdue/Renew, Recalled by partner, Renew requested, Renewed by partner, Report lost item to partner	Actions

**Figure 43 - Workflow Profile Lender Check In Configured (Alma main menu > Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles)**

☐ Iron Man.  
 Article  
 ISSN: 1093-0809 1093-0809  
 Subject: Comic books, strips, etc.  
 Status: Returned item to partner  
[View](#) | [Remove](#) | [Duplicate](#) | [Send query to patron](#)

**Figure 44 - Returned Item to Partner Status**

- If the borrowing Workflow Profile for the partner does not include the **Lender check in** option, the request status is changed to **Request completed** with the assumption that no indication will be received from the lender when the item is physically checked in by the lender.



# Analytics

The following sections describe the functions provided for Analytics in the May 2013 release of Alma.

## E-Inventory Data Exposed in Analytics

### Description

The purpose of this enhancement is to expose the E-Inventory data for creating reports and dashboards in the E-Inventory area.

### Technical Instructions

The Design Analytics role can access this enhancement.

**To access Alma Analytics E-Inventory data:**

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **New > Analysis > E-Inventory**.

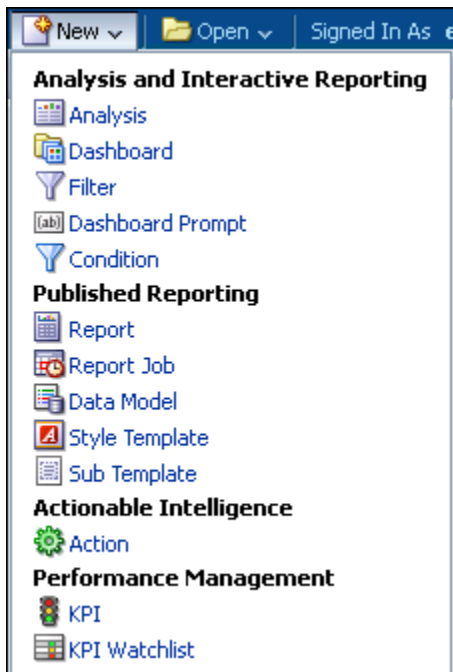
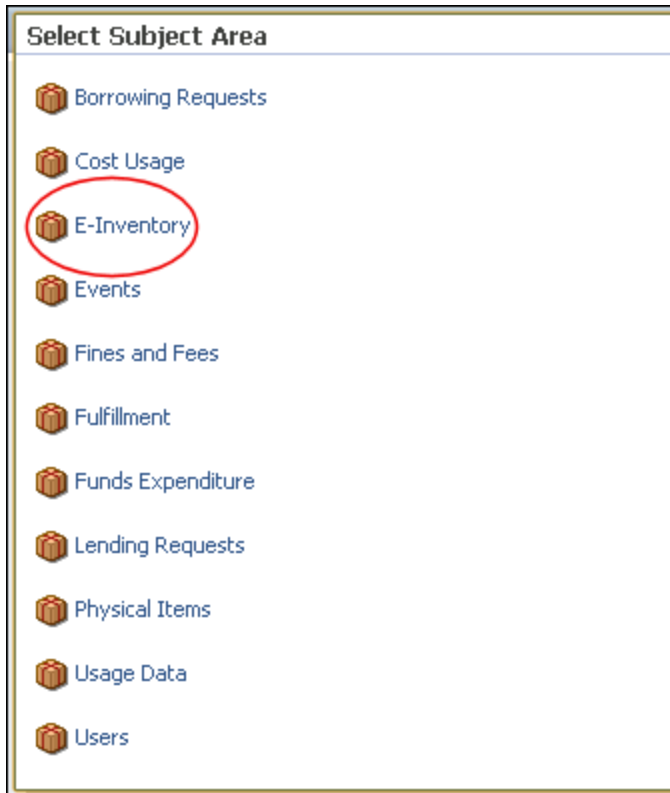


Figure 45 – New > Analysis Option



**Figure 46 – E-Inventory Data Exposed in Analytics**

With this subject area exposed, the dashboards are able to display results such as the example below.

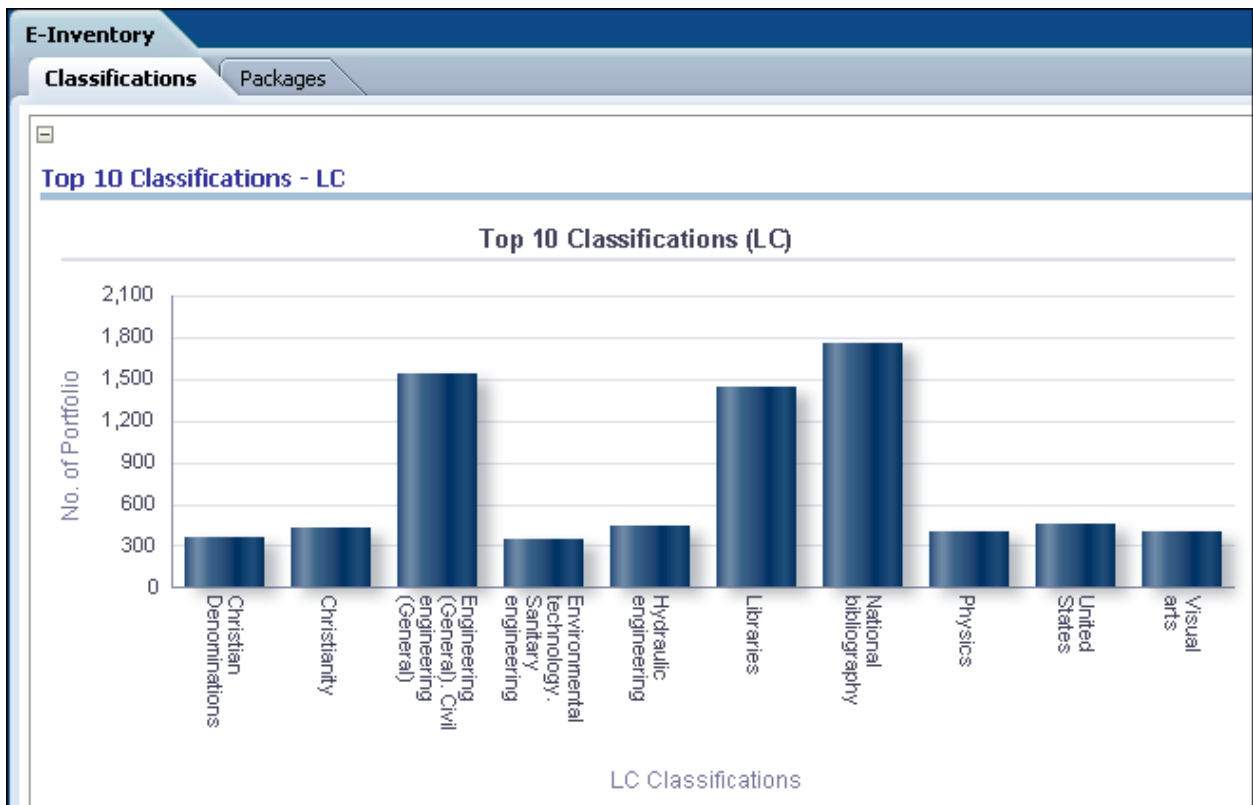


Figure 47 - Analytics E-Inventory Data Displayed

### To access the E-Inventory dashboards:

- 1 From the Alma main menu > General > Analytics, click **Design Analytics**.
- 2 Click **Catalog** and open the **E-Inventory** dashboard (Shared Folders > Alma > E-Inventory > Dashboards > E-Inventory).

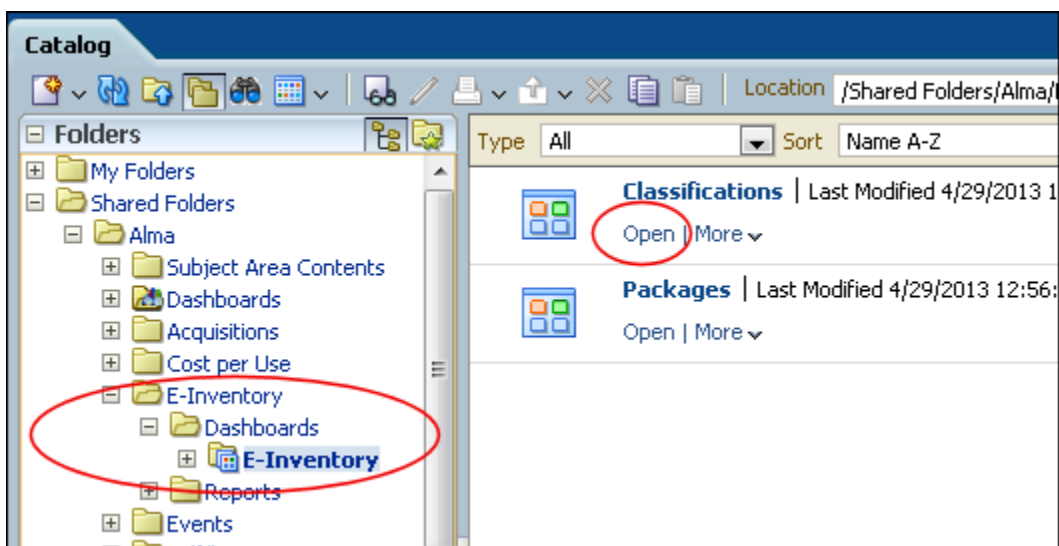
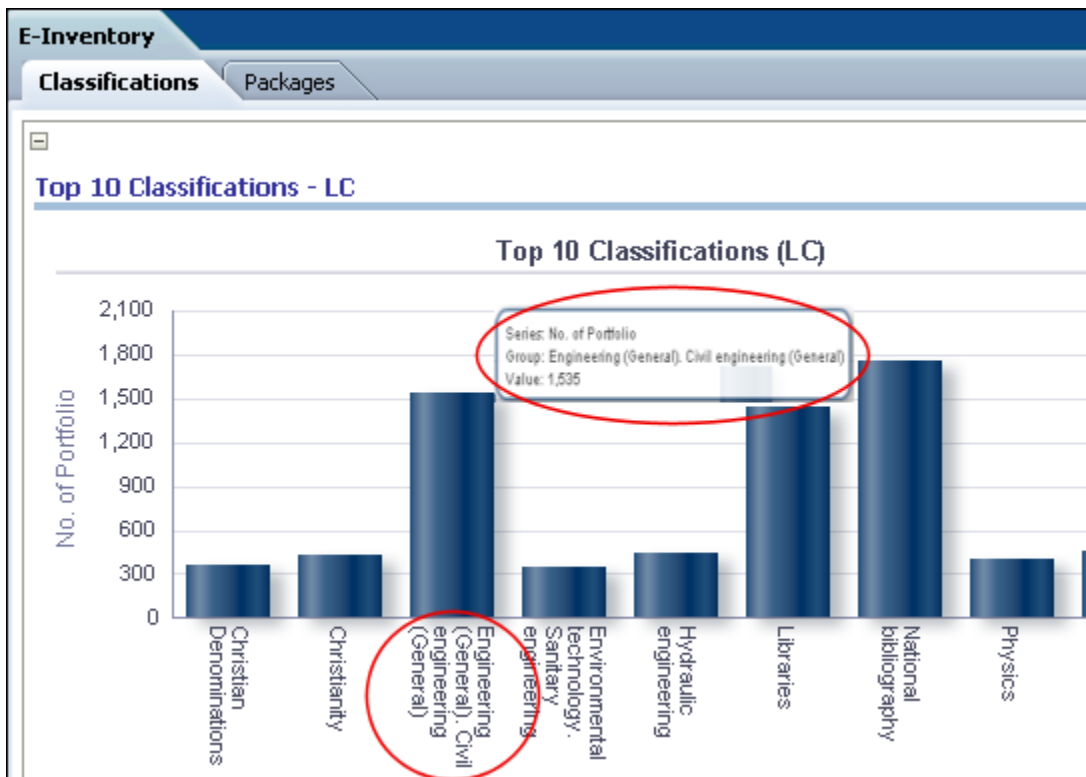


Figure 48 – E-Inventory Dashboard Options

- 3 Click **Open** for Classifications or Packages to display either of these dashboards.
- 4 Move your cursor to a specific entity in the graph to display the specific details for that entity in a pop-up window.



**Figure 49 - Inventory Dashboard Details**

- 5 Use the Packages tab to drill down to the portfolio level.
- 6 Continue using the Analytics options to view the E-Inventory data in other ways.  
Refer to the Alma Analytics Guide for more information.

# System Enhancements

The following section describes Alma system enhancements provided in the May 2013 release.

## Improved Caching of JavaScript and CSS Files

The purpose of this enhancement is to improve the caching of JavaScript and CSS files related to the user interface. This is being addressed in the navigation between Alma pages in the browser and how browser requests are handled.