



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

# Alma August 2013 Release Highlights

## Acquisitions

- Defining Import Profiles for Mixed Resources

This enhancement allows for importing both physical and electronic materials in one file. This functionality was added to support vendors that provide one file containing both physical and electronic material types as part of the EOD/shelf-ready workflows.

## Resource Management

- Linking Sets of Institution Zone Records to Network Zone Records

The purpose of this enhancement is to provide the ability to link Institution Zone (IZ) bibliographic records to bibliographic records that are managed in the Network Zone (NZ). This is handled by running a new process called **Linking set records to Network Zone**.

- Search for Electronic Resources in the Network Zone

This new enhancement provides the ability to search for electronic resources that are managed centrally in the Network Zone (NZ). The search results include all available links where relevant. For title and collection results, there is a drill-down link for accessing the list of portfolios.

- Enhanced Network Zone Display Results

The purpose of this enhancement is to show CZ bibliographic records that are used by Network members in the NZ. The Network Zone will now include all bibliographic records of electronic resources that are activated from the CZ by the individual members. This means that the Network Zone will now include a comprehensive view of all records for both physical and electronic material.

- New Indexes Added for Bibliographic Records

New index options have been added – 004, 024\_8 and 033 fields. Users can search using these indexes (Source Record ID, Other Standard Identifier and Event Date) from the Advanced Search.

## Digital Resource Management

- New Digital Workflow Enhancements for Early Release Testers

As part of the August release, new digital workflow functionality has been added. This functionality is available only for Alma early release testers and should be used exclusively by them. In the next couple of months, upon successful testing, this functionality will be available to all Alma users.

## Fulfillment

- Walk-In Loans at Other Institutions in the Fulfillment Network

Patrons of an institution may walk into a library of any institution that is part of the same Fulfillment Network as their home institution, and easily and seamlessly register at the circulation desk for fulfillment services, such as borrowing an item.

- Automatic Renewal of Loans after a Recall

The Send Courtesy Notices and Handle Loan Renewals job automatically renews loans (unless the renewal is not allowed). In some cases, automatic renewals done by this job may be prevented because of patron blocks, library policies, or if there are pending requests for the item on loan. With this enhancement, loans that were not renewed will automatically be renewed (dependent on library policies and configuration) when requests on the item are cancelled or fulfilled by another item.

- Replace Daily Circulation Desk Report with Application Spreadsheet Download

This enhancement replaces the Daily Circulation Desk report with a downloadable Excel file that includes a report of fine transactions that have been performed over a 1- to 7-day period.

## Resource Sharing

- Creating Rota Templates for Borrowing Requests

This enhancement allows for the creation of rota templates (groups of partners) that are used when processing borrowing requests. Rota templates enable quickly attaching a group of partners to a borrowing request, instead of manually adding partners one-by-one. It is now possible to manually assign partners and groups of partners contained in a rota template to resource sharing borrowing requests.




# Alma August 2013 Documentation Highlights

In addition to handling minor fixes to the documentation based on feedback we received, we have added documentation, or improved upon the existing documentation, in the following key areas since the July release:

- Update of import profile and copy cataloging handling of merge rules, including examples for each type of merge (under Resource Management > Metadata Management > Working with Merge Rules)
- Detailed explanation of each type of acquisitions method (under Acquisitions > Purchasing > Creating PO Lines > Manually Creating a PO Line)
- Clarification of the steps available when configuring a resource sharing workflow profile (under Fulfillment > Fulfillment Configuration > Configuring Workflow Profiles)




## Access to August 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/<br>Setup Required<br><small>(Note: Automatically visible to all users with the appropriate user role/permission)</small> | Activation/<br>Setup Required | Visible to Administrator Only | Contact Ex Libris to Activate This Feature |
|--|---|-------------------------------|-------------------------------|--|
| Acquisitions:<br><a href="#">Fund Allocation Loader</a>  |    |                               |                               |  |
| Acquisitions:<br><a href="#">Defining Import Profiles for Mixed Resources (Physical and Electronic)</a>  |    |                               |                               |  |
| Resource Management:<br><a href="#">Linking Sets of Institution Zone Records to Network Zone Records</a> |    |                               |                               |  |



| Feature   | No Activation/<br>Setup Required<br><small>(Note: Automatically visible to all users with the appropriate user role/permission)</small> | Activation/<br>Setup Required | Visible to Administrator Only | Contact Ex Libris to Activate This Feature |
|---|---|-------------------------------|-------------------------------|--|
| Resource Management:<br><a href="#">Search for Electronic Resources in the Network Zone</a>                 |    |                               |                               |  |
| Resource Management:<br><a href="#">Enhanced Network Zone Display Results</a>                               |    |                               |                               |  |
| Resource Management:<br><a href="#">New Indexes Added for Bibliographic Records</a>                         |    |                               |                               |  |
| Resource Management:<br><a href="#">Batch Delete Bibliographic Records That Have No Inventory</a>           |    |                               |                               |  |
| Digital Resource Management:<br><a href="#">New Digital Workflow Enhancements for Early Release Testers</a> |    |                               |                               |  |
| Fulfillment:<br><a href="#">Automatic Renewal of Loans after a Recall</a>                                   |    |                               |                               |  |
| Fulfillment:<br><a href="#">Allowing Walk-In Loans at Other Institutions in the Fulfillment Network</a>     |    |                               |                               |  |
| Fulfillment:<br><a href="#">Replace Daily Circulation Desk Report with Application Spreadsheet Download</a> |    |                               |                               |  |
| General:<br><a href="#">Customizing View It and Get It</a>  |    |                               |                               |  |

| Feature   | No Activation/<br>Setup Required<br><small>(Note: Automatically visible to all users with the appropriate user role/permission)</small> | Activation/<br>Setup Required | Visible to Administrator Only | Contact Ex Libris to Activate This Feature |
|---|---|-------------------------------|-------------------------------|--|
| Resource Sharing:<br><a href="#">Creating Rota Templates for Borrowing Requests</a> |    |                               |                               |  |
| Resource Sharing:<br><a href="#">Manual Rota Assignment</a>                         |    |                               |                               |  |
| Analytics:<br><a href="#">PO Line Item Description Exposed in Analytics</a>         |    |                               |                               |  |

# Data Services

The Alma August 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 17-July-2013 through 11-August-2013:

- ProQuest Curriculum Essentials New Platform
- Bentham Subscription Based Books
- de Gruyter eBooks Literature 2013
- CRKN Wiley Blackwell Backfiles
- Sage Knowledge Complete Navigator Collection 2013
- Newsbank Ethnic American Newspapers from the Balch Collection, 1799-1971
- Civil War Collection
- County Histories
- IngentaConnect Spandidos
- IngentaConnect Science International Corporation
- The Lily
- Frank Leslie's Illustrated Newspaper
- National Anti-Slavery Standard
- The National Standard
- Scenes in the life of Harriet Tubman
- National Citizen and Ballot Box
- The Revolution
- Ingenta Connect Ingenta The Mailout Trust
- Ingenta Connect American Association of Family & Consumer Sciences
- Ingenta Connect Editorial Office of Journal of China Coal Society
- Ingenta Connect Editorial Office of Journal of Plant Genetic Resources

- Ingenta Connect The Chinese Ceramic Society
- Ingenta Connect Editorial Office of Transactions of the Chinese Society of Agricultural Engineering
- Ingenta Connect Optimal Clinical Ltd
- Safari Premium Content Library
- ebrary History Political Science
- Morgan & Claypool Synthesis Collection Five
- Japanese Free E- Journals

## New External Resources That Are Open for Searching

This section highlights the new external resource names. The following external resources were added for this release:

- British Library Integrated Catalogue (MARC)
- Monash University Library Catalogue
- German National Library - MARC21
- RLUK research libraries UK
- State Library of Victoria
- AMICUS
- SUNCAT (MARC)
- CAPITA (BDSAllM21)
- CAPITA (BLConM21)
- CAPITA (LCAAllM21)
- CAPITA (NLMAAllM21)
- CAPITA (UnionM21)
- Online Dakota Information Network (ODIN)
- South Dakota Library Network (SDLN)
- Swiss National Library (NB)  
(The Swiss National Library uses a special credentials syntax to link to the library. It uses idPass authentication. Refer to the description for details.)

# Alma Show Me How

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

## Alma Show Me How – August

### 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 August release, the following Show Me How scenarios are available:
  - Import Physical & Electronic Material in One File
  - Search for E-Resources in the Network Zone
  - Manual Rota Assignment for Borrowing Requests
  - Send or Print Loan Receipts
  - Move Items between Holdings Records

# Acquisitions

The following section describes the features provided for the Acquisitions component in the August 2013 release of Alma.

## Fund Allocation Loader

### Description

This enhancement enables allocating amounts to funds in batch mode. Funds that exist in an ERP may not have been adjusted accordingly in Alma. You use the Fund Allocation Loader to allocate amounts to the funds in Alma. The amount to be adjusted is specified in an Excel file, which is imported via the ERP integration profile.

### Technical Instructions

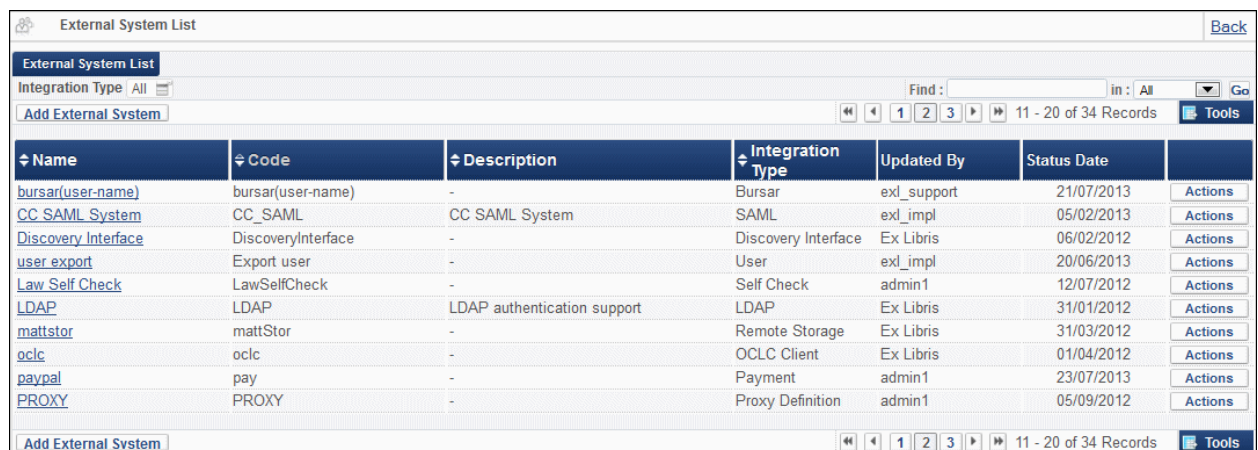
The following role can access this facility:

- General System Administrator

#### To access the Fund Allocation Loader:

- From the Alma main menu > General > General Configuration > Configuration Menu, select **External Systems > External Interfaces**.

The External System List page opens.



| Name                                | Code               | Description                 | Integration Type    | Updated By  | Status Date | Actions                 |
|-------------------------------------|--------------------|-----------------------------|---------------------|-------------|-------------|-------------------------|
| <a href="#">bursar(user-name)</a>   | bursar(user-name)  | -                           | Bursar              | exl_support | 21/07/2013  | <a href="#">Actions</a> |
| <a href="#">CC SAML System</a>      | CC_SAML            | CC SAML System              | SAML                | exl_impl    | 05/02/2013  | <a href="#">Actions</a> |
| <a href="#">Discovery Interface</a> | DiscoveryInterface | -                           | Discovery Interface | Ex Libris   | 06/02/2012  | <a href="#">Actions</a> |
| <a href="#">user export</a>         | Export user        | -                           | User                | exl_impl    | 20/06/2013  | <a href="#">Actions</a> |
| <a href="#">Law Self Check</a>      | LawSelfCheck       | -                           | Self Check          | admin1      | 12/07/2012  | <a href="#">Actions</a> |
| <a href="#">LDAP</a>                | LDAP               | LDAP authentication support | LDAP                | Ex Libris   | 31/01/2012  | <a href="#">Actions</a> |
| <a href="#">mattstor</a>            | mattStor           | -                           | Remote Storage      | Ex Libris   | 31/03/2012  | <a href="#">Actions</a> |
| <a href="#">oclc</a>                | oclc               | -                           | OCLC Client         | Ex Libris   | 01/04/2012  | <a href="#">Actions</a> |
| <a href="#">paypal</a>              | pay                | -                           | Payment             | admin1      | 23/07/2013  | <a href="#">Actions</a> |
| <a href="#">PROXY</a>               | PROXY              | -                           | Proxy Definition    | admin1      | 05/09/2012  | <a href="#">Actions</a> |

Figure 1 – External System List Page

- In the Integration Type filter, select **Payment** to display the Payment external systems.

- 3 Select **Actions** > **Edit** for an external system, and click the **Actions** tab.

The External System Actions tab page displays.

The screenshot shows the 'External System' configuration page with the 'Actions' tab selected. The page is divided into three main sections for configuring different actions:

- Import Payment Confirmation:** Includes an 'Active' radio button (Non Active is selected), a 'Plugin' dropdown, an 'Input File Path' text field, a 'Run' button, and a 'Schedule' dropdown set to 'Not scheduled'.
- Export Invoice For Payment:** Includes an 'Active' radio button (Non Active is selected), a 'Plugin' dropdown, an 'Output File Path' text field, a 'Run' button, a 'Schedule' dropdown set to 'Not scheduled', and a 'Use xsd format' checkbox.
- Funds Allocation Loader:** Includes an 'Active' radio button (Non Active is selected), a 'Plugin' dropdown, an 'Input File Path' text field, a 'File Extensions' radio button (Excel is selected), a 'Schedule' dropdown set to 'Every day at 01:00', and a 'Run' button.

Figure 2 – External System — Actions Tab Page

- 4 Configure the fields in the Funds Allocation Loader section, as follows:
  - a Select whether you want the integration you are configuring to be active or non-active. Note that **Active** must be selected in order for the import/export job to be run (by default, the **Non-active** option is selected).
  - b From the **Plugin** drop-down list, select the out-of-the-box plug-in that is used to run the invoice import/export (not currently in use).
  - c In the **Input file path**, enter a subdirectory of the path specified when creating the S/FTP connection. For example, if you specified Alma in the **Sub-directory** field during S/FTP connection configuration and you enter `fundallocation` in the **Input file path** field, the fund allocations are imported to the Alma/fundallocation directory.

---

**Note:** The value of the **Input file path** field cannot be identical to either the **Input file path** value in the Import Payment Confirmation section, or the **Output file path** value in the Export Invoice For Payment section.

---

S/FTP Connections are configured using the **S/FTP Definitions** option located in the **External Systems** section of the **General Configuration > Configuration Menu**.

- d Select the file type that is being imported, **.csv** or **Excel (.xls)**. For details on creating a batch file, see [To create the batch file](#) below.
- e From the **Schedule** drop-down list, select a scheduling option, predefined by an Ex Libris administrator. If you select **Not scheduled**, the fund allocation job runs only when you run it manually, which you can do by clicking **Run**.

5 Click **Save**.

#### To create the batch file:

You create a batch file as either a .csv or Excel document, for importing fund information via the Fund Allocation Loader. The file must contain the headers described in the following table:

| Header                       | Description  |
|------------------------------|--|
| FUND_EXTERNAL_ID             | The value of the <b>External ID</b> or <b>Code</b> field on the Summary Details page for a fund. This is the identifying value for the fund, and is mandatory.   |
| FISCAL_PERIOD_ID             | An identifying number for the fiscal period, as displayed in the Fund and Ledger Fiscal Period mapping table (Acquisitions Configuration > Configuration Menu > General > Fund and Ledger Fiscal Period).                                  |
| AMOUNT                       | The amount to be allocated to the specified fund. The value can be either positive or negative (a negative value indicates that money is being taken out of the fund) and does not include currency. A value for this column is mandatory. |
| TRANSACTION_REFERENCE_NUMBER | A reference number for the transaction.  |
| TRANSACTION_NOTE             | A free text note for the transaction.  |

Table 1: Batch file headers

Upload the file for fund allocation, as described above in the procedure [To access the Fund Allocation Loader](#).



# Defining Import Profiles for Mixed Resources (Physical and Electronic)

## Description

The purpose of this enhancement is to enable importing both physical and electronic material in one file. This functionality was added to provide support for vendors who provide one file containing both material types as part of the EOD/shelf-ready workflows. This specifically applies to a New Order import profile type.

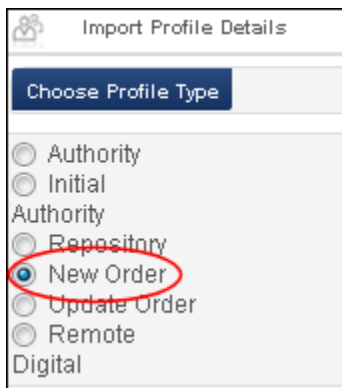


Figure 3 - New Order Import Profile Type

## Technical Instructions

The following role can access this facility:

- Acquisitions Administrator
- Catalog Administrator
- General System Administrator

### To access this facility:

- 1 From the Alma main menu > Acquisitions > Acquisitions Configuration > Configuration Menu, select **Purchase Orders > Import Profiles** (or Resource Management > Resource Configuration > Configuration menu and select **Record Import > Import Profiles**).

The Run Import page displays.

| Run Import                          |                 |                             |              | Monitor Imports |
|-------------------------------------|-----------------|-----------------------------|--------------|-----------------|
| Run Import                          |                 |                             |              |                 |
| Filter: All                         |                 | Find:                       | in: All      | Go              |
| Add New Profile                     |                 | 1 2 3 1 - 10 of 613 Records |              | Tools           |
| Active                              | Profile Name    | Profile Description         | Profile Type |                 |
| <input checked="" type="checkbox"/> | 0102120350_auto | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0102120350_man  | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0103120327auto  | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0103120457_auto | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0103120457_man  | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0104121212_auto | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0104121212_man  | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0104121223_auto | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0104121223_man  | -                           | Repository   | Actions         |
| <input checked="" type="checkbox"/> | 0104121330_auto | -                           | Repository   | Actions         |
| Add New Profile                     |                 | 1 2 3 1 - 10 of 613 Records |              | Tools           |

Figure 4 – Run Import Page

- 2 Configure a new profile or edit an existing profile, as described in the **Managing Profiles for Record Imports** chapter in the *Alma Resource Management Guide*.
- 3 On page 6 of the Import Profile Details wizard, select **Mixed** in the Inventory Operations section.

The page refreshes and displays the mapping fields.

|   |  |                    |  |  |  |
|---|--|--------------------|--|--|--|
| Import Profile Details  |  | 1 2 3 4 5 6        |  |  |  |
| Profile Type Repository   |  | Profile Name test2 |  |  |  |
| Inventory Operations  |  |                    |  |  |  |
| <input type="radio"/> Electronic <input type="radio"/> Physical <input type="radio"/> None <input checked="" type="radio"/> Mixed |  |                    |  |  |  |
| Resource Type *   |  | subfield *         |  |  |  |
| E-Book Mapping  |  |                    |  |  |  |
| Material type   |  | Book               |  |  |  |
| Extract access URL from field   |  | subfield           |  |  |  |
| Extract provider name from field  |  | subfield           |  |  |  |
| Default Extract Provider Name   |  |                    |  |  |  |
| Access note   |  |                    |  |  |  |
| Enable Proxy  |  | False              |  |  |  |
| Activate Resource   |  |                    |  |  |  |
| Library   |  | subfield           |  |  |  |
| Default Library   |  |                    |  |  |  |
| Physical Item Mapping   |  |                    |  |  |  |
| Material type   |  | Book               |  |  |  |
| Library field   |  | subfield           |  |  |  |
| Location field  |  | subfield           |  |  |  |
| Default Library   |  |                    |  |  |  |
| Map Library/Location  |  |                    |  |  |  |
| Number of items field   |  | subfield           |  |  |  |
| Barcode field   |  | subfield           |  |  |  |
| Item policy Field   |  | subfield           |  |  |  |
| Default Location  |  |                    |  |  |  |
| Default Number  |  |                    |  |  |  |

Figure 4 – Import Profile Details Page

**Note:** When editing an existing profile (**Actions > Edit**), these fields are displayed in the **Inventory Information** tab.

- 4 In the **Inventory Operations** section, enter the values in the **Resource type** (MARC 21 field number) and **subfield** fields to indicate the field in the EOD file to be referenced in order to determine the material type being imported.

The specified **subfield** must reference a field in the EOD file that contains one of the following values:

- **E** — Indicates that the resource being imported is electronic
- **P** — Indicates that the resource being imported is physical

**Note:** These field values are case-sensitive.

- 5 If you are defining a New Order or Update Order type of profile, on page 7 of the Import Profile Details wizard, you must specify the type for both the **Physical PO Line Type** and the **Electronic PO Line Type** parameters when you select **Mixed** in the Inventory Operations section.

The screenshot shows the 'Import Profile Details' wizard for a 'New Order' profile. The 'EOD General Parameters' section contains several fields: 'Physical PO Line Type' and 'Electronic PO Line Type' (both dropdown menus, circled in red), 'Vendor' (text input), 'PO Line Currency' (dropdown, set to 'US Dollar'), 'Decimal Point Location' (dropdown, set to '0'), and 'Acquisition Method' (dropdown, set to 'Purchase'). The 'EOD mapping' section contains a table for mapping fields to subfields:

| Field                         | Subfield |
|-------------------------------|----------|
| PO Line field                 |          |
| Vendor Reference Number field |          |
| List Price field              |          |
| Vendor Title Number field     |          |

**Figure 5 - Physical PO Line Type and Electronic PO Line Type Parameters**

- 6 Click **Save**.

## Other Acquisitions Enhancements

- When clicking **Order now** for a PO line, the PO line is now processed correctly.
- Data issues preventing an invoice with an **In Review** status from proceeding in the workflow have been corrected.
- Pro rata invoices that were stuck with an **In Review** status now proceed correctly in the workflow.
- The issues that were causing PO lines not to be sent via EDI due to "Read Timed Out" errors (following the July release) have been fixed.
- Regarding the functionality of Claims letters, if no email address is specified for a vendor's receipt of Claims letters, the system uses the preferred email address defined for the vendor.

# Resource Management

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

## Linking Sets of Institution Zone Records to Network Zone Records

### Description

The purpose of this enhancement is to provide the ability to link Institution Zone (IZ) bibliographic records to bibliographic records that are managed in the Network Zone (NZ). This is handled by running a new process called **Linking set records to Network Zone** against a set of records that you create.

The ability to also contribute records that have no match in the NZ will be rolled out in a future release.

### Technical Instructions

The following roles can access this new process function:

- Digital Inventory Operator
- Catalog Manager or Administrator
- Electronic Inventory Operator
- Repository Manager
- Requests Operator

**To run the Linking set records to Network Zone process with a previously created set of records:**

- 1 From the Alma main menu > Resource Management > Processes, select **Run Process**.

This opens the process wizard and displays the Create Process – Select Process to Run page.

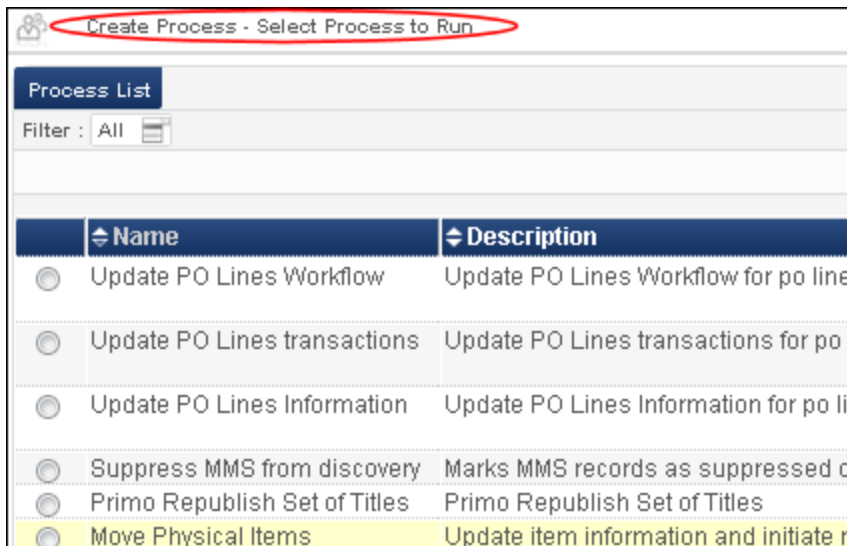


Figure 6 - Create Process - Select Process to Run Page

2 Select **Metadata Management** from the filter drop-down list.

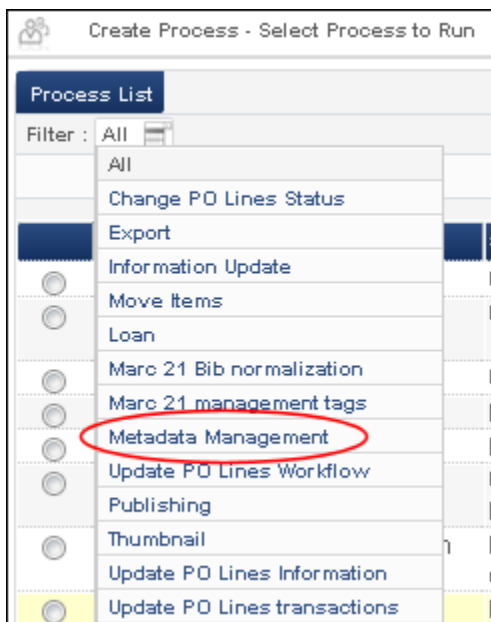


Figure 7 - Metadata Management Filter Option

The **Linking set records to Network Zone** process displays in the process list.

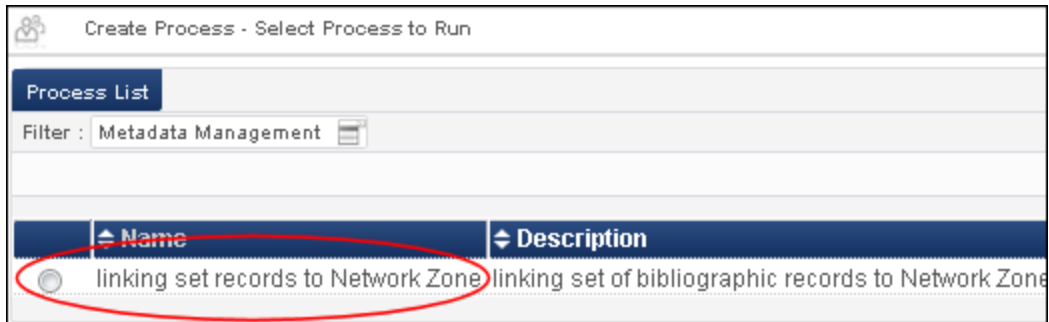


Figure 8 - Linking Set Records to Network Zone Option

- 3 Select the **Linking set records to Network Zone** process and click **Next**.

The Create Process – Select Set page displays.

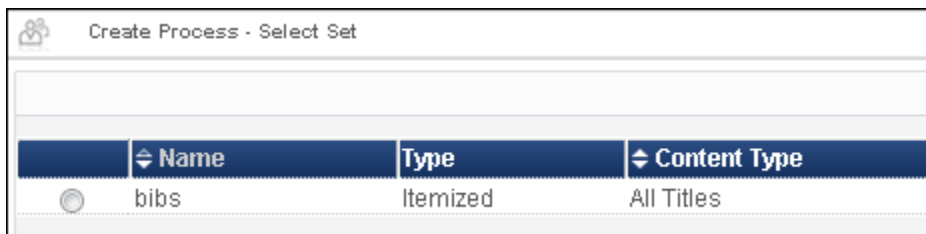


Figure 9 - Create Process - Select Set Page

- 4 Select the set that you previously created for this process and click **Next**.

The Create Process – Enter Task Parameters page displays.

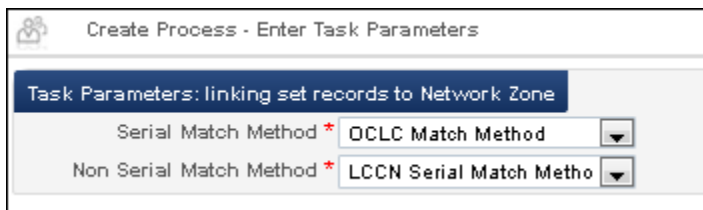


Figure 10 - Process Task Parameters

Refer to the table below for the serial and nonserial match methods that are provided.

| Method              | Parameter   |
|---------------------|---|
| Serial match method | <ul style="list-style-type: none"> <li>▪ LCCN Serial Match Method</li> <li>▪ 001 to MMS_ID Match Method</li> <li>▪ OCLC Serial Match Method</li> <li>▪ ISSN/024/035 Match Method</li> <li>▪ Fuzzy Serial Match Method</li> <li>▪ ISSN Match Method</li> </ul> |

|                        |   |
|------------------------|---|
| Nonserial match method | <ul style="list-style-type: none"> <li>▪ OCLC Match Method</li> <li>▪ Fuzzy Non-Serial Match Method</li> <li>▪ 001 Match Method</li> <li>▪ 001 to MMS_ID Match Method</li> <li>▪ ISBN Match Method</li> <li>▪ LCCN Match Method</li> <li>▪ ISBN/024/035 Match Method</li> </ul> |
|------------------------|---|

Refer to the *Alma Resource Management* guide or section in the online help for more information.

- 5 Select a match method and click **Next**.
- 6 Enter a process name, schedule the process, and click **Next**.

Figure 11 - Create Process - Process Details and Schedule

- 7 Confirm your process settings and click **Save**.



**Create Process - Review and Confirm**

**General Information**  
Process Name: Linking Set to NZ Process 1

**Task Parameters: linking set records to Network Zone**  
Serial Match Method: 001 To MMS\_ID Match Method  
Non Serial Match Method: LCCN Serial Match Method

**Set Information**  
Set ID: 1365620000151  
Name: bibs

**Scheduling**  
Schedule: As soon as possible

Figure 12 - Create Process - Review and Confirm Page

The job report from running this process provides the information as displayed in the illustration below.

**Job Report** [Back](#)

Process ID: 61047120000151      Name: test  
 Started on: 07/26/2013 04:23:27 AM HST      Finished on: 07/26/2013 04:23:29 AM HST  
 Total run time: 1 Seconds      Created by: exl\_impl  
 Status: Completed Successfully      Status date: 07/26/2013 04:23:33 AM HST  
 Records processed: 1      Records with exceptions: 0

**Counters**

- Number of records successfully linked: 1
- Number of records with multi-match: 0
- Number of records failed to link: 0
- Number of errors: 0

Figure 13 - Linking Set Records to Network Zone Processing Job Report

## Search for Electronic Resources in the Network Zone

### Description

The purpose of this enhancement is to provide the ability to search for electronic resources that are managed centrally in the Network Zone (NZ). This includes searches for electronic titles, electronic collections, and electronic portfolios. The search results include all available links

where relevant. For title and collection results there is a drill-down link for accessing the list of portfolios.

Electronic availability look ahead will be added in a later release.

## Technical Instructions

Any role that can access Repository Search can access this enhancement.

### To search for electronic resources in the Network Zone:

- 1 From the Alma main menu > Resource Management > Search and Sets, select **Repository Search**.
- 2 From the Network tab, complete a search for electronic titles.

The search results display electronic resources.



Figure 14 - Electronic Search Results in the Network Tab

- 3 Click the **Package List** link for a resource in the results list.

The portfolio list displays.



Figure 15 - Network Zone Portfolio List

## Enhanced Network Zone Display Results

The purpose of this enhancement is to show in the Network Zone CZ bibliographic records that are used by members. The Network Zone now includes all bibliographic records of electronic resources that are activated from the CZ by the individual members. In addition to the bibliographic records, the Network Zone presents members' holdings for those bibliographic records. By adding this capability, the Network Zone now includes a comprehensive view of all bibliographic records in the collaborative network for both physical and electronic material. See below for an illustration of these records.

**Note:** Contact Ex Libris to enable this functionality.

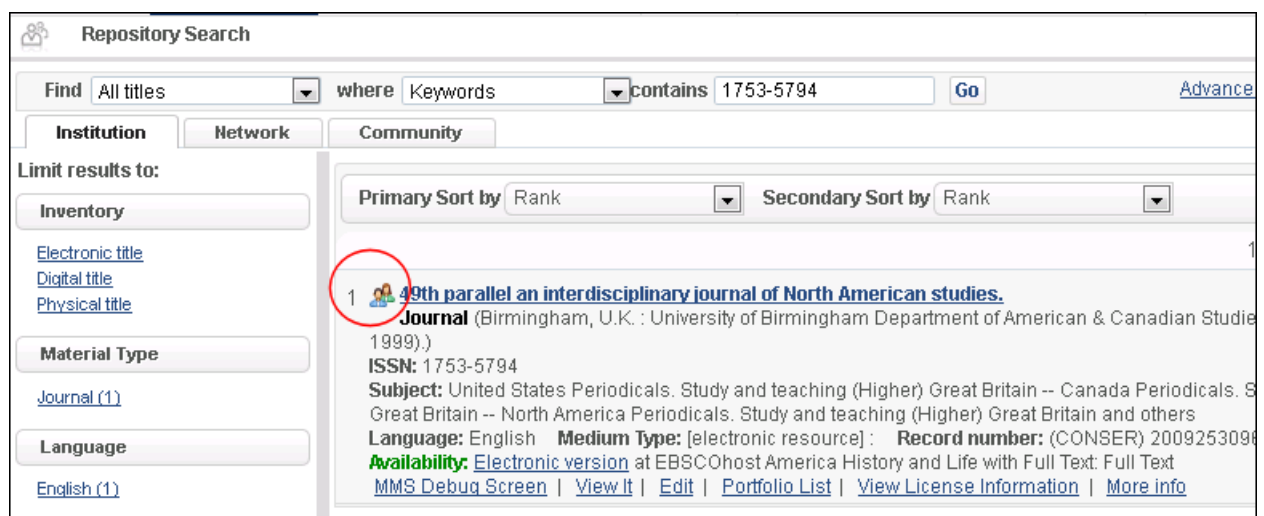


Figure 16 - Institution Tab Displays a CZ Record for the "49th parallel ..."

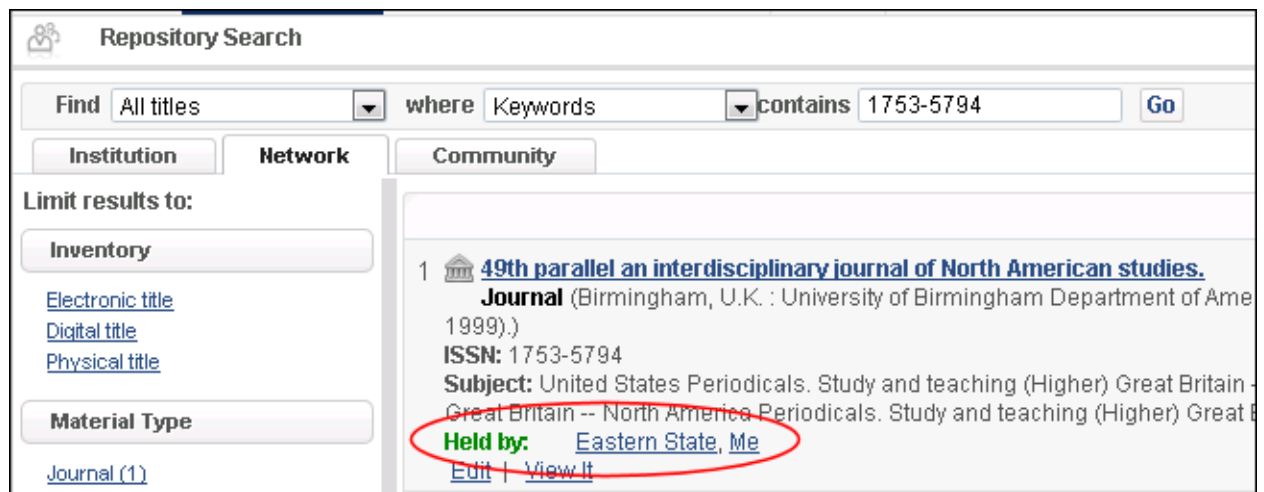


Figure 17 – Network Tab Displays Held By Members for the "49th parallel ..."

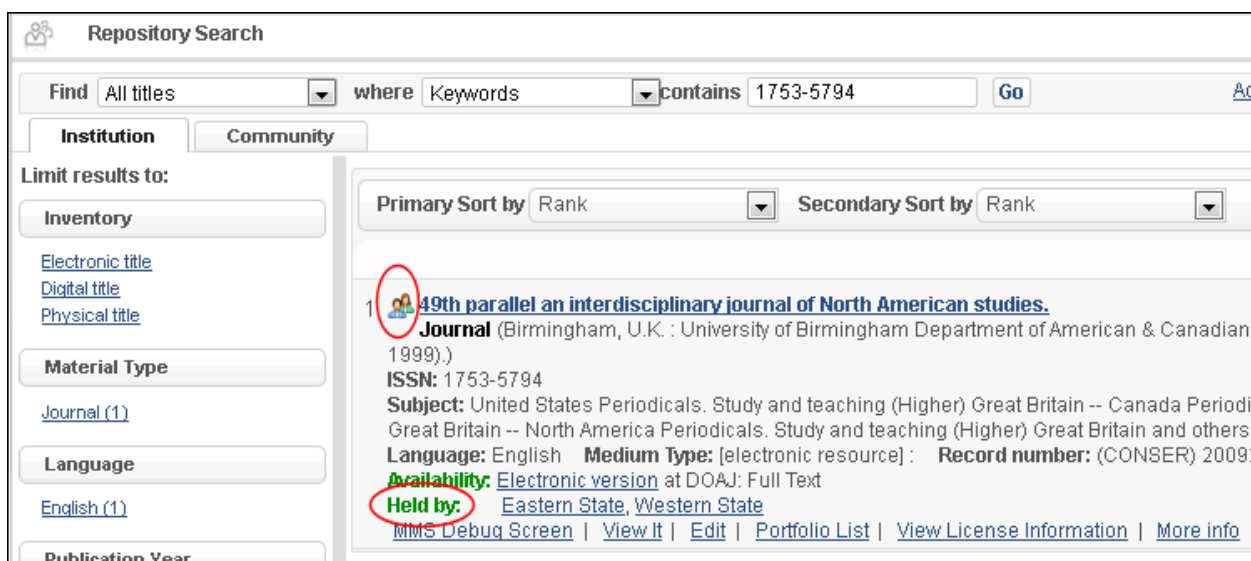


Figure 18 – Institution Tab Displays the "49th parallel ..." Record Logged into the NZ

## New Indexes Added for Bibliographic Records

### Description

With the August release, the following indexes have been added:

- 004 – Source Record ID
- 024\_8 – Other Standard Identifier
- 033 – Event Date

### Technical Instructions

Any role can access these indexes.

#### To access the new indexes:

- 1 From the Alma main menu > Resource Management > Search and Sets, click **Repository Search**.
- 2 Click **Advanced Search**.
- 3 Click **Add Conditions**.  
The Advanced Search pop-up window displays.
- 4 Locate/scroll to the new indexes (see the figure below).

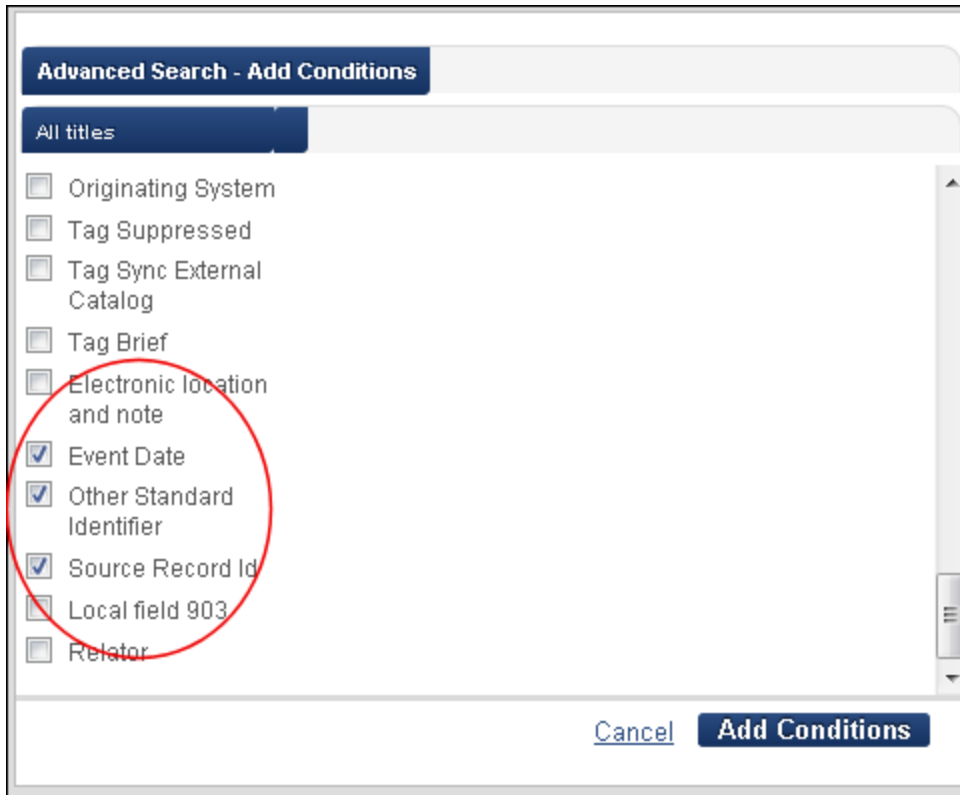


Figure 19 - New Indexes

## Batch Delete Bibliographic Records That Have No Inventory

### Description

---

**Note:** This feature is scheduled to be available in the first hot fix to the August release.

---

The purpose of this enhancement is to provide the ability to batch delete bibliographic records that have no inventory, are not connected to orders, and (for consortia/NZ records) are not linked to consortia members' records.

Sets for the batch delete process can be saved from an **All titles** repository search. Any bibliographic records in the set that have inventory, are connected to orders, and (for consortia/NZ records) are linked to consortia members' records will not be deleted. These exceptions are identified in the job report (see below).

The job report includes counts for the following and an option to download a detailed Excel file of the report (with MMS IDs):

- Deleted bibliographic records

- Bibliographic records with inventory
- Bibliographic records with POs
- Bibliographic records linked to consortia members' records

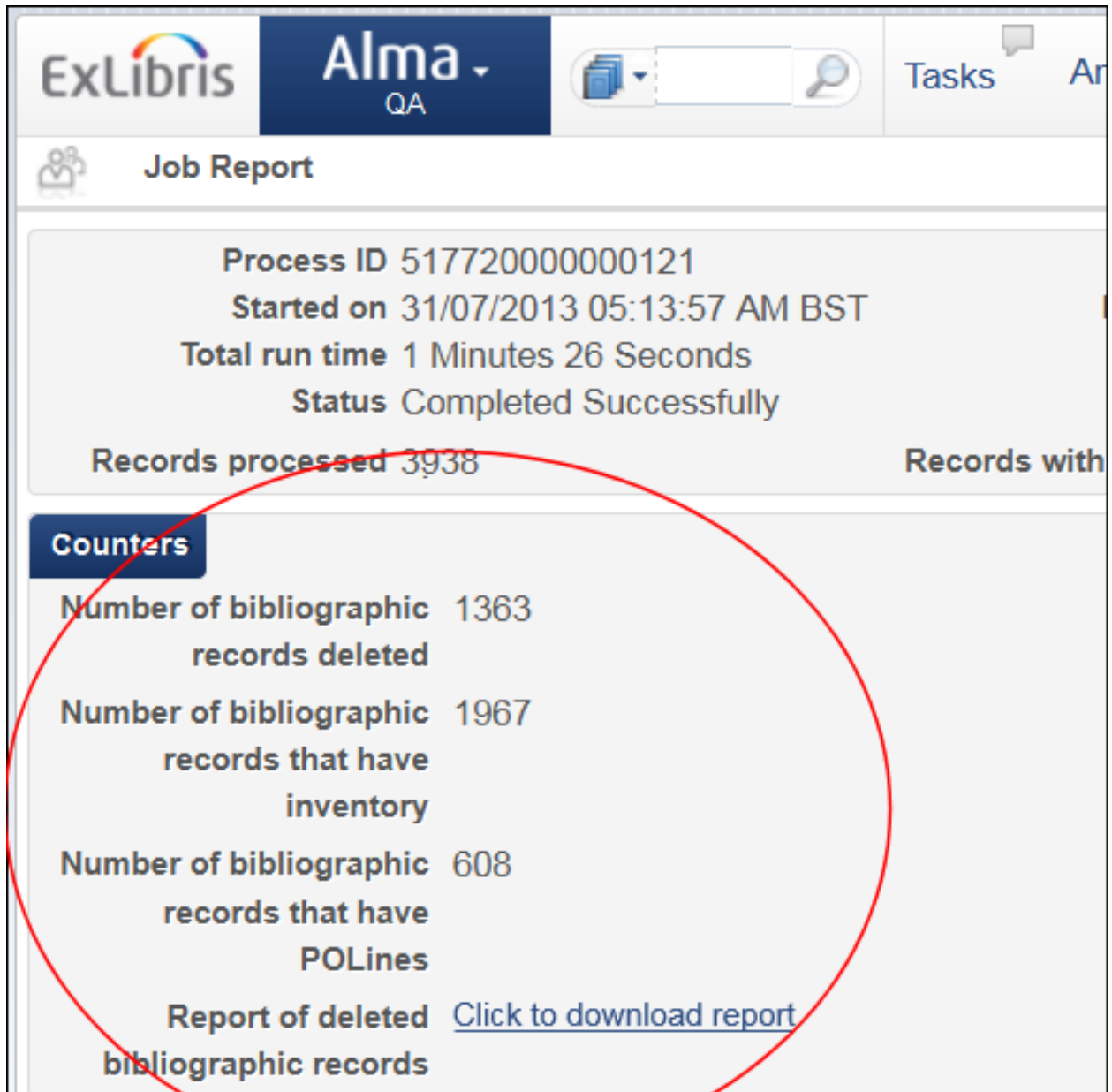


Figure 20 - Batch Delete Report Counts

|    | A  | B | C | D | E | F | G | H | I | J | K | L | M |
|----|--|---|---|---|---|---|---|---|---|---|---|---|---|
| 1  | 992832010000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 2  | 992862050000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 3  | 992842050000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 4  | 992862020000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 5  | 992872050000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 6  | 992842020000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 7  | 992822040000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 8  | 992892020000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 9  | 992832040000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 10 | 992892050000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 11 | 992872020000121  |   |   |   |   |   |   |   |   |   |   |   |   |
| 12 | 993281950000121  |   |   |   |   |   |   |   |   |   |   |   |   |
|    | <div> Deleted records Records with inventory Records with POLines Records used by members </div> |   |   |   |   |   |   |   |   |   |   |   |   |

Figure 21 - Batch Delete Excel File (Downloaded)

## Technical Instructions

Any roles that have delete privileges may run this process.

### To run the batch delete process:

- 1 From the Alma main menu > Resource Management > Processes, click **Run Process**.
- 2 Select the **Withdraw** filter option.
- 3 From the filtered process list, select **Delete bibliographic records** and click **Next**.

| Name                         | Description                  | Content Type        | Type     |
|------------------------------|------------------------------|---------------------|----------|
| Withdraw items               | Withdraw physical items task | Physical item       | Withdraw |
| Delete Bibliographic records | Delete Bibliographic records | Bibliographic title | Withdraw |

Figure 22 - Delete Bibliographic Records Process Option

- 4 From the Create Process – Select Set page, select the set that you previously created for the delete process and click **Next**.
- 5 Click **Next** (no parameters need to be specified on the Create Process – Enter Task Parameters page).
- 6 Enter a process name, select the schedule, and click **Next**.
- 7 Review the process information provided on the Create Process – Review and Confirm page and click **Save**.

Create Process - Review and Confirm

**General Information**

Process Name CC Bibliographic Record Delete 1

**Set Information**

Set ID 23430380000121

Name Bibliographic\_Test

**Scheduling**

Schedule As soon as possible

Figure 23 - Create Process - Review and Confirm Page

## Other Resource Management Enhancements

- A Receipt Date column was added to the List of Items page. It is also possible to sort by this column.
- When you search for a string that is part of the 035 field, you no longer receive the entire 035 field in your search results.
- The value # is now being handled properly as a space during the validation of MARC records.
- When running the bibliographic record normalization process on a set containing cached records from the Network Zone, the records are skipped. This is indicated in the process report.



# Digital Resource Management

The following section describes the functions provided for the digital component of Alma Resource Management in the August 2013 release.

## New Digital Workflow Enhancements for Early Release Testers

As part of the August release, the following new digital workflow functionality items have been added:

- A new import profile for remote digital objects (available as a new bullet in the first step of the **Add Import Profile** wizard)
- The ability to add Collections (available through the **Create Inventory > Add Collection**)
- The configuration of remote digital repositories (available through the **Resource Configuration** page)
- New text (**From Rosetta/Digitool/DSpace**) that displays on the right of the search results page when viewing titles that have remote digital resources
- **View It** for remote digital items
- A new **Representations** tab on the **Digital IE Resource Editor** page (accessed via **Edit** from the repository search results list)

These items are available only for Alma early release testers and should be used exclusively by them. In the next couple of months, upon successful testing, this functionality will be available to all Alma users.

# Fulfillment

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

## Automatic Renewal of Loans after a Recall

### Description

The Send Courtesy Notices and Handle Loan Renewals job automatically renews loans unless the renewal is not allowed. In some cases, automatic renewals done by this job may be prevented because of patron blocks or library policies, or if there are pending requests that may be fulfilled by the on-loan item. With this enhancement, loans that did not get renewed because of pending requests will automatically be renewed when the blocking requests are cancelled or fulfilled by another item, if library policies and the patron status allow for the renewal to take place.

### Technical Instructions

No configuration is necessary to enable this feature.

## Allowing Walk-In Loans at Other Institutions in the Fulfillment Network

### Description

This enhancement enables circulation staff to quickly and seamlessly register patrons who belong to another institution in the Fulfillment Network. Patrons of an institution may walk into a library of any institution that is part of the same Fulfillment Network as their home institution, and easily register at the circulation desk for receiving fulfillment services, such as borrowing an item. Any patron blocks or limits that apply at the patron's home institution or any other institution in the Fulfillment Network will not apply across institutions for walk-in loans.

---

**Note:** This feature is dependent upon the configuration of a Fulfillment Network. To configure a Fulfillment Network, contact your Ex Libris representative.

---

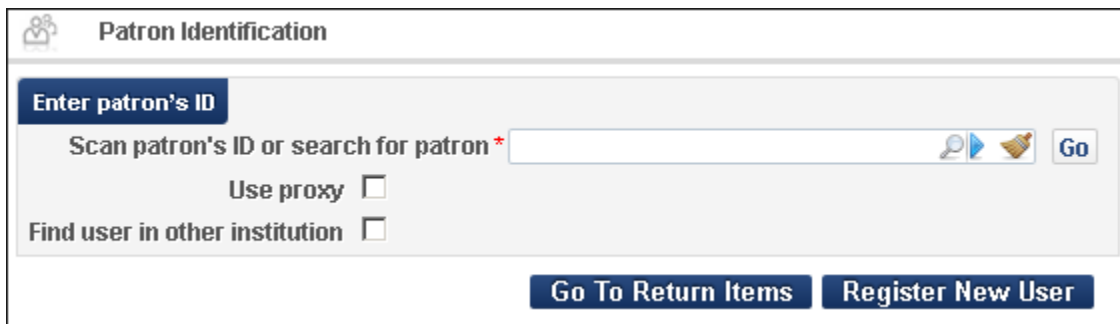
## Technical Instructions

The following roles can perform this functionality:

- Circulation Desk Manager (logged in to a circulation desk)
- Circulation Desk Operator (logged in to a circulation desk)
- User or General Administrator (to configure the walk-in patron account rules)

### To register a patron who belongs to another institution in the Fulfillment Network:

- 1 On the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**), enter the patron's local ID to identify the walk-in patron, just as local patrons are identified at the desk.

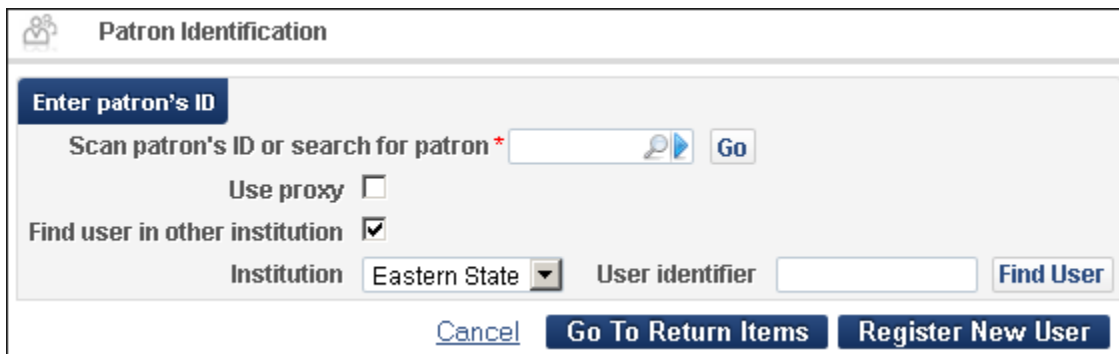


The screenshot shows the 'Patron Identification' page. At the top, there's a header with a person icon and the text 'Patron Identification'. Below this is a section titled 'Enter patron's ID'. It contains a text input field with the placeholder 'Scan patron's ID or search for patron \*'. To the right of the input field are three icons: a magnifying glass, a blue arrow, and a yellow bell. A 'Go' button is to the right of these icons. Below the input field are two checkboxes: 'Use proxy' and 'Find user in other institution', both of which are unchecked. At the bottom of the form are two buttons: 'Go To Return Items' and 'Register New User'.

Figure 24 – Search for a Patron in the Local Institution

If the patron's ID is found, you can proceed with the loan on the Patron Services page. Otherwise, continue to the next step to register the patron with this institution.

- 2 If the walk-in patron does not have a local ID, search for the patron's information at the patron's home institution.
  - a Select **Find user in other institution** to open the Fulfillment Network search fields.



The screenshot shows the 'Patron Identification' page with the 'Find user in other institution' checkbox checked. The 'Enter patron's ID' section is still present. Below the 'Find user in other institution' checkbox, there is a new section with a dropdown menu labeled 'Institution' showing 'Eastern State' selected, a text input field labeled 'User identifier', and a 'Find User' button. At the bottom of the form, there is a 'Cancel' button and the 'Go To Return Items' and 'Register New User' buttons.

Figure 25 – Search for Patron at Another Institution in the Fulfillment Network

- b Select the walk-in patron's home institution from the **Institution** drop-down list.
- c Scan or type the walk-in user's ID in the **User identifier** field.

- d Click **Find User**.
- e The Quick User Management page opens with contact information already retrieved from the walk-in patron's home institution.

**Quick User Management** [Cancel](#) [Update User](#)

**User Details**

User Information

First name \* Joe Middle name

Last name \* West **Primary identifier \***

PIN number  [Generate](#)

Job category Please select a value Job description

Gender  User group Please select a value

Campus  Preferred language English

Birth date  Expiration date

Purge date

Email Addresses

Email types \* ☐ Personal ☐ School ☒ Work Email address Joe.West@sgroup.com

Addresses

Address types \* ☐ Alternative ☒ Home ☐ School ☐ Work

Street address 2 S Calumet Ave.

City Aurora

State/Province IL Postal code 60506

Country United States

Phone Numbers

Phone types ☐ Home ☐ Mobile ☐ Office ☐ Office fax Phone number

[Cancel](#) [Update User](#)

**Figure 26 – Register User from Another Institution**

- 3 Enter the patron's ID in the **Primary identifier** field.
  - 4 Specify any other optional fields.
  - 5 Click **Update User** to create/register the patron for your local institution.
- The Patron Services page opens, allowing you to continue with the loan.

## To configure account rules for the walk-in patron:

- 1 From the Alma main menu > General > User Management Configuration > Configuration Menu, select **Collaborative Networks > Linked Account Rules**.

The Linked Account Rules page displays.

- 2 Click the **Edit** button to the right of the Default Linked Account rule to redefine the default rule, or click **Add Rule** to define a new rule.
- 3 Enter the name of the new rule you are defining and optionally, a description of the rule.
- 4 Optionally, under **Input Parameters**, select **Source Institution** and an operator and value for the parameter. For example, **Source Institution = Eastern State**

The screenshot shows the 'Linked Account Rules' page with the 'Linked Account Rule Editor' tab active. The 'Name' field is set to 'Eastern State'. Below it, the 'Description' field is empty. The 'Created By' and 'Updated By' fields are both set to '-'. The 'Created On' and 'Updated On' dates are both '08/07/2013'. The 'Input Parameters' section is expanded, showing a table with columns 'Name', 'Operator', and 'Value'. The 'Name' column has a dropdown menu with 'Source Institution' selected. The 'Operator' column has a dropdown menu with '=' selected. The 'Value' column has a dropdown menu with 'Eastern State' selected. There is a 'Possible Values >' link next to the 'Operator' dropdown. An 'Add Parameter' button is at the bottom right of the table.

Figure 27 – Linked Account Rules – Input Parameters

- 5 Under **Output Parameters**, select a user group to which the walk-in patron will be assigned and optionally, an absolute or relative expiration date and/or purge date for the patron.

The screenshot shows the 'Output Parameters' section of the 'Linked Account Rules' page. It contains a table with columns 'Name' and 'Result'. The 'Name' column has a dropdown menu with 'User Group' selected. The 'Result' column has a dropdown menu with 'Guest' selected. Below the 'User Group' dropdown, there are fields for 'Expiry Date' (set to '08/29/2013'), 'Expiry From' (set to 'Source'), 'Purge Date' (set to '08/31/2013'), and 'Purge After' (set to 'Expired'). Each date field has a calendar icon next to it.

Figure 28 – Linked Account Rules – Output Parameters

- 6 Click **Save**.

The rule is added to the Linked Account Rules page. The rules are considered in the order in which they are listed on this page. The first rule whose criteria are met by the walk-in patron is applied to the patron.

# Replace Daily Circulation Desk Report with Application Spreadsheet Download

## Description

This enhancement replaces the Daily Circulation Desk report with a downloadable Excel file that includes a report of the fines transactions that have been performed over a 1- to 7-day period.

---

**Note:** Longer periods can be accessed from Alma Analytics.

---

This report allows you to specify the following filters:

- Received by library – filters by the library at which the fine/fees were paid or waived
- Received by circulation desk – if a library is specified, filters by the circulation desk at which the fine/fees were paid or waived
- Transaction types – filters by the type of transaction:
  - Payment and Waive – includes both payments and waivers
  - Payment – includes only payments
  - Waive – includes only waivers
- Fine owner – filters by the owner of the fine/fee, which may or may not be the same location where the fine/fee was paid or waived

Reports can be sent to a specific user or printer.

---

**Note:** The existing **Fulfillment > CheckIn/CheckOut > Daily Report** menu option is not removed in this release, but will be removed by the end of the year, leaving the new Fines and Fees Report as the only reporting option.

---

## Technical Instructions

The following roles can perform this functionality:

- Fulfillment Administrator
- Circulation Desk Manager
- General System Administrator

### To create the Fines and Fees Report:

- 1 On the **Fulfillment > Advanced Tools** menu, click **Create Fines and Fees Report**.

The Fines and Fees Report page opens.

**Create Fines And Fees Report**

From date: \* 30/07/2013 To date: \* 30/07/2013

Received by library: Received by circulation desk:

Transaction types: Payment and Waive Fine owner:

Report receiver: ☒ Printer ☐ User

Printer: Law Library - Law Circ User:

Figure 29 – Fines and Fees Report Page

- 2 Enter the following information to set up the report:
  - **From date** – Specify the start date of the report. By default, it is set to the current date.
  - **To date** – Specify the end date of the report. By default, it is set to the current date.

---

**Note:** If you specify more than a 7-day period, you will receive an error message.

---

- 3 Specify any of the filters listed above and the destination of the report (Printer or User).
- 4 Click **Run Now**.

The report is sent to the specified report receiver.





# General

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

## Customizing View It and Get It

### Description

This enhancement simplifies the customization of skins by introducing an out-of-the-box CSS file, which is used as the constant for all skins. The following icons have been added: `broom.png`, `icon_data.png`, and `time_icon.png`.

Alma uses the following CSS files to define the look and feel of the View It and Get It tabs and the U-Resolver screen:

- **otb\_mashup.css** – This file was added to define the out-of-the-box look and feel for the Primo View It and Get It tabs and the U-Resolver screen and cannot be modified. The system automatically loads this file first for all skins.
- **calendar.css** – This file defines the classes associated with the existing calendar component. You may update the classes as needed in this file.
- **mashup.css** – For new skins, this file contains the same classes defined in the `otb_mashup.css` file, but each class is commented out. Classes that are modified and uncommented in this file override the respective class definitions in the `otb_mashup.css` file.

If you have already customized this file in previous releases, it will continue to work as it did before. However, you will not have the ability to override the new date and time widget classes unless you download the default zip file and copy the new classes from the default `mashup.css` file to your customized version of the `mashup.css` file.

```
750  /****Date and Time widget*****/
751  Classes below are used to define the look and feel of the date & time component
752  *****/
753
754  /*input.hasDatepicker[type="text"] {
755      background: url("/view/branding_skin/icons/icon_date.png") no-repeat 100.5% center #fff;
756  }*/
757  /*input.hasDateAndTimePicker[type="text"] {
758      background: url("/view/branding_skin/icons/icon_date.png") no-repeat 101% center #fff;
759  }*/
760  /*input[type="submit"].dateTimeReset {
761      text-indent: -100000em;
```

Figure 31 – Start of Date and Time Widget Classes in Default Mashup.css File

**Note:** To make sure that you are updating the latest version of a skin, it recommended that you download it from the server rather than using a copy stored on your local machine.

## Technical Instructions

The following roles can perform this functionality:

- General System Administrator

### To add a new skin:

- 1 On the General Configuration page (**General > General Configuration > Configuration Menu**), click **Digital Delivery** under **Branding/Logo**.

The Manage Skins page displays.



Figure 32 – Manage Skins Page

- 2 Click **Add Skin**.

The Add a Skin page displays.

Figure 33 – Add a Skin Page

- 3 In the **Skin Zip File** section, click the **Default Zip file** link to download the default CSS and associated image files to your desktop.
- 4 Modify the contents of the files that you want to customize.

---

**Note:** To customize the `mashup.css` file, update and uncomment each class that you want to override.

---

- 5 Put all of the CSS and image files into a Zip file, keeping the original structure of the default Zip file.

---

**Note:** You must retain the original structure of the Zip file, including the names of the files and subdirectories and the number of files.

---

- 6 In the Skin Details section, enter a name for the new skin in the **Skin name** field.
- 7 In the Skin Zip File section on the Manage Skins page, specify the name of your new Zip file in the **Please submit a zip** field.
- 8 Click **Save**.

---

**Note:** If you want this skin to be used in the Primo View It and Get It tabs, you must configure the Templates mapping table in the Primo Back Office.

---

#### To modify a skin:

- 1 On the General Configuration page (**General > General Configuration > Configuration Menu**), click **Digital Delivery** under **Branding/Logo**.

The Manage Skins page displays.



Figure 34 – Manage Skins Page

- 2 Select **Actions** > **Edit** in the row containing the skin you want to modify.

The Add a Skin page opens.

Figure 35 – Add a Skin Page

- 3 In the **Skin Zip File** section, click the **Skin Zip file** link to download the customized CSS and associated image files to your local machine.
- 4 Modify the contents of the files that you want to customize.

---

**Note:** To customize the `mashup.css` file, update and uncomment each class that you want to override. If you are using an older version of the `Mashup.css` file, you may need to copy the classes from the default Zip file, which is downloaded when adding new skins.

---

- 5 Put all of the CSS and image files into a Zip file, keeping the original structure of the default Zip file.

---

**Note:** You must retain the original structure of the Zip file, including the names of the files and subdirectories and the number of files.

---

- 6 Specify the name of your new Zip file in the **Please submit a zip** field.
- 7 Click **Save**.

# Resource Sharing

The following sections describe the functions provided for Resource Sharing in the August 2013 release of Alma.

## Creating Rota Templates for Borrowing Requests

### Description

The purpose of this enhancement is to enable staff users to create rota templates (groups of partners) which are used when processing borrowing requests. Rota templates enable quickly attaching a group of partners to a borrowing request, instead of manually adding partners one-by-one.

Rota templates can be arranged either in an ordered or non-ordered list. An ordered list means that the rota's partners will be attached to a request in the same order in which they have been set up in the rota template. A non-ordered list means that the partners will be attached to the request in a random order.

### Technical Instructions

The Fulfillment Administrator role can access this facility.

#### To configure non-ordered rota templates for resource sharing requests:

- 1 From the Alma main menu > Fulfillment > Configuration > Configuration Menu > Resource Sharing > Rota Templates, click **Add Template**.

The General Information page displays.

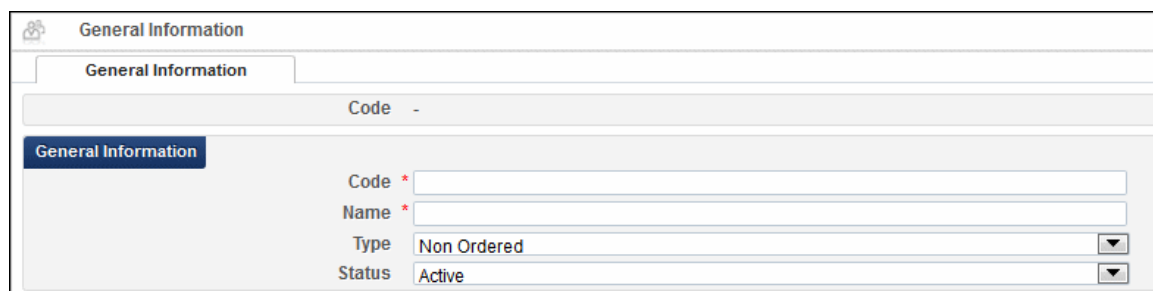
The screenshot shows the 'General Information' page in the Alma system. At the top, there is a breadcrumb trail: 'General Information' > 'General Information'. Below this, there is a section titled 'General Information' with a 'Code' field. The main form area contains four fields: 'Code \*' (text input), 'Name \*' (text input), 'Type' (dropdown menu with 'Non Ordered' selected), and 'Status' (dropdown menu with 'Active' selected). The 'Code' field has a '-' symbol next to it.

Figure 36– General Information Page

- 2 In the **Code** and **Name** fields, enter values for the template code and name, respectively.
- 3 In the **Type** field, select **Non Ordered**.
- 4 In the **Status** field, select whether the template status is to be **Active** or **Inactive**.

5 Click **Save and Add Members**.

The Template Members page displays.

The screenshot shows the 'Template Members' page with the 'General Information' tab selected. The 'Code' field is set to '2563'. Below the tabs, there is a 'Partner' field with a search icon and an 'Add partners' button. At the bottom, a message states 'No records were found.'

Figure 37 – Template Members Page

6 Browse for a partner in the **Partner** field (you can select multiple partners) and click **Add Partners**.

The selected partners are displayed in the table in the Template Members tab.

The screenshot shows the 'Template Members' page with the 'Template Members' tab selected. The 'Code' field is '2563' and the 'Name' field is 'Rota 1'. Below the tabs, there is a 'Partner' field with a search icon and an 'Add partners' button. A table displays the selected partners:

| Name                   | Code | Profile Type | Status |
|------------------------|------|--------------|--------|
| Test Partner - Lending | 7821 | Email        | Active |
| Partner 3              | 6323 | ARTEmail     | Active |
| Partner 2              | 8974 | Email        | Active |

Figure 38 – Template Members Tab

7 Click **Save**.

**To configure ordered rota templates for resource sharing requests:**

1 From the Alma main menu > Fulfillment > Configuration > Configuration Menu > Resource Sharing > Rota Templates, click **Add Template**.

The General Information page displays.

The screenshot shows the 'General Information' page for adding a new template. The 'General Information' tab is selected. The 'Code' field is set to 'Rota2'. Below the tabs, there are input fields for 'Code', 'Name', 'Type', and 'Status'. The 'Type' field is set to 'Ordered' and the 'Status' field is set to 'Active'.

Figure 39 – General Information Page

2 In the **Code** and **Name** fields, enter values for the template code and name, respectively.

- 3 In the **Type** field, select **Ordered**.
- 4 In the **Status** field, select whether the template status is to be **Active** or **Inactive**.
- 5 Click **Save and Add Members**.

The Template Members page displays.

Template Members

General Information | **Template Members** | Notes

Code Rota2

**Template Members**

Partner Test Partner - L Place At/Before  Add partners

No records were found.

Move Selected

Figure 40 – Template Members Tab

- 6 Browse for a partner in the **Partner** field (you can select multiple partners) and click **Add Partners**.

The selected partners are displayed in the table on the Template Members tab.

Template Members

General Information | **Template Members** | Notes

Code Rota2 Name Rota2 - Ordered

**Template Members**

Partner Partner Place At/Before First Add partners

|                          | Move Up | Move Down | Name                   | Code | Profile Type | Status |
|--------------------------|---------|-----------|------------------------|------|--------------|--------|
| <input type="checkbox"/> |         |           | Test Partner - Lending | 7821 | Email        | Active |
| <input type="checkbox"/> |         |           | Partner 2              | 8974 | Email        | Active |

First Move Selected

Figure 41 – Template Members Tab — Ordered List

- 7 You can add new members by browsing for a partner in the **Partner** field and, in the **Place At/Before** field, select where in the list you want the selections to be placed. Click **Add Partners**.

The partners are displayed in the table according to your selection.

- 8 Modify the order of the partners in one of the following ways:
  - Use the **Move Up/Move Down** arrows to specify the exact sequence of the partners to be displayed.
  - Select partners and, in the drop-down list on the bottom of the page, choose the place in the list to which the selected partners are to be moved. Click **Move Selected**.



# Manual Rota Assignment

## Description

The purpose of this enhancement is to enable you to manually assign partners and groups of partners contained in a rota template to resource sharing borrowing requests. The order of partners in the rota template reflects the order in which they are attached to the request, if the rota template has been defined as **Ordered**. When a request is rejected by a partner, the request moves to the next partner, according to the order in which the partners were added to the request. The partners that are assigned to a request are referred to as the request's rota.

---

**Note:** The list of partners cannot yet be managed within a request. This capability is planned for a later release.

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The order of partners in a rota template is arranged in the **Resource Sharing > Rota Templates** option in Fulfillment Configuration.

## Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

### To access the adding partners and rota templates to a request:

- 1 From the Alma main menu > Fulfillment > Resource Sharing, click **Borrowing Requests** and select the **Edit** row action for a specific request.

The Resource Sharing Borrowing Request page displays.



|                          | Name              | Code        | Status | Profile Type |
|--------------------------|-------------------|-------------|--------|--------------|
| <input type="checkbox"/> | partner1 iso name | partner1ISO | Active | ISO          |
| <input type="checkbox"/> | partner2 iso name | partner2ISO | Active | ISO          |
| <input type="checkbox"/> | partner3 iso name | partner3ISO | Active | ISO          |

Figure 43 – Resource Sharing Partner List Page

- 3 Select the check boxes of the partners to add to the request's rota, and click **Select**.
- 4 To add rota templates to a request, click **Add Rotas**.

The Rota Templates page displays with the list of available rota templates.

|                          | Name       | Code  | Status | Type    |
|--------------------------|------------|-------|--------|---------|
| <input type="checkbox"/> | Template 1 | 12345 | Active | Ordered |
| <input type="checkbox"/> | Template 2 | 5555  | Active | Ordered |

Figure 44 – Rota Templates Page

- 5 Select the check boxes of the rota templates to add to the request, and click **Select**. Alma sends requests to the partners in the rota.

You can configure rotas to be used either in the order in which they are listed (Ordered) or in a random order (Non-ordered), via Fulfillment Configuration. For details, see [Creating Rota Templates for Borrowing Requests](#).

## Other Resource Sharing Enhancements

- Borrowing requests now appear as required on the Resource Sharing Lending Requests Task List page.

# Analytics

The following section describes the function provided for Analytics in the August 2013 release of Alma.

## PO Line Item Description Exposed in Analytics

### Description

The purpose of this enhancement is to expose the PO line item description for reports and dashboards.

### Technical Instructions

The Design Analytics role can access this enhancement.

**To access the PO line item description in Alma Analytics:**

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

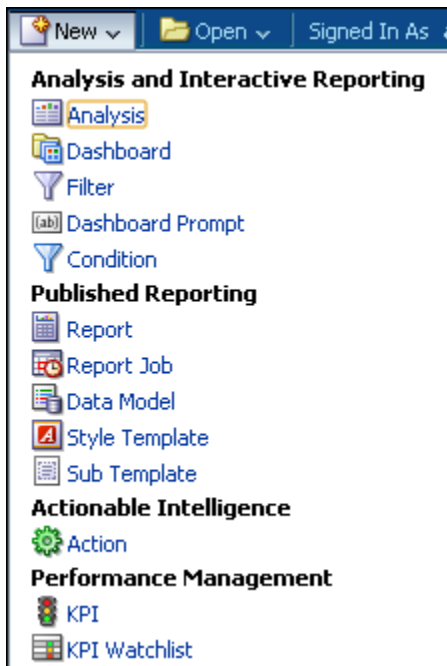


Figure 45 – New > Analysis Option

The Select Subject Area options display.

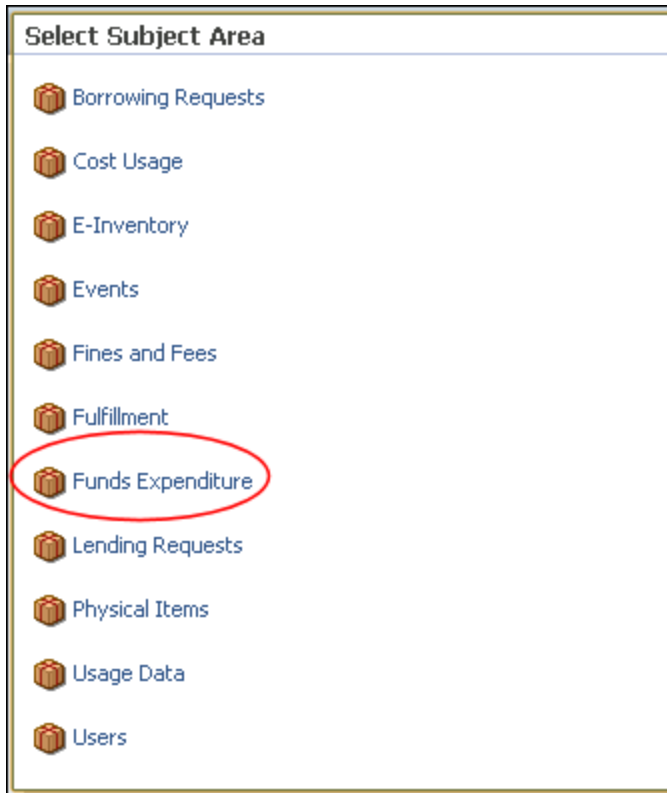


Figure 46 – Funds Expenditure Menu Option

3 Click **Funds Expenditure**.

The Funds Expenditure subject areas display.

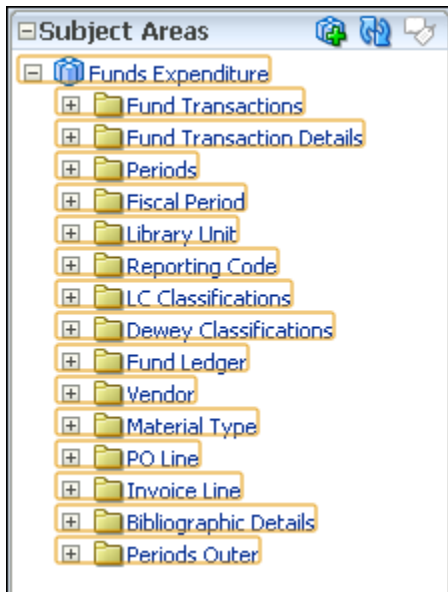


Figure 47 - Funds Expenditure Subject Areas

#### 4 Expand PO Line.

The Item Description option displays in the list.

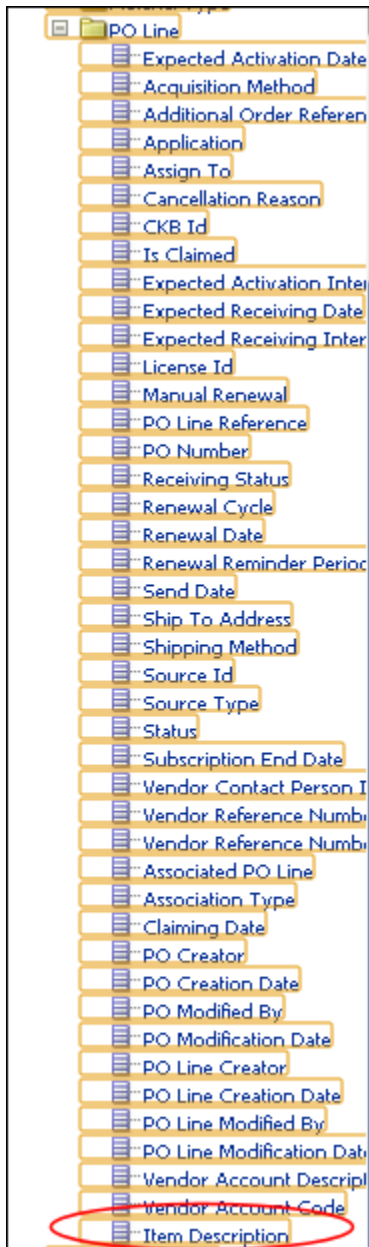


Figure 48 - PO Line Item Description

## Known Issue

- Ex Libris recently discovered a performance issue with the Loan Web Service (also known as Loan WS), specifically with the fine calculation that provides the accrued fine for an overdue loan. In order to provide acceptable performance to all our customers, Ex Libris has disabled this part of the Loan WS. All other functions in the Loan WS work as expected. A solution to the fine calculation performance issue will be provided in an upcoming release. We apologize for any inconvenience this may cause.