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Table of Contents

1	**About the Alma Release Notes**	**7**
2	**Alma November 2013 Release Highlights**	**8**
	Acquisitions	8
	Resource Management	8
	Import Profiles	9
	Collaborative Networks	9
	Fulfillment	9
	Resource Sharing	10
	Analytics	10
	Primo	10
	General	10
3	**Data Services**	**11**
	New Electronic Packages Added to the Alma CKB	11
	Other Data Services Enhancements	11
4	**Alma Show Me How and Videos**	**12**
	Alma Show Me How – November	12
	Alma Videos – November	13
5	**Acquisitions**	**14**
	Changing PO Lines Status/Import for Electronic Resources	14
	Improved Holdings Capabilities When Receiving PO Lines	18
	Invoice Exchange Rates Exported to ERP	21
	EDI Enhancements	25
	Other Acquisitions Enhancements	27
6	**Resource Management**	**29**
	Enhanced Authority Record Management	29
	Improvements for Authority Control	32
	Improvements to Local Authority Support	35

Normalization Improvements to the 035 Field for Search and Match Purposes 39

Processing Improvements with Automatic Creation of 866/867/868 Holdings Fields 40

Expand Record from Template in MD Editor 42

Debugging Publishing Information 44

Export E-Inventory Job 46

Top-Level Collection Page 48

Collection Resource Editor – Complete Remaining Functionality 50

Deleting Digital Items 56

Additional Parsing Option for Label Printing 58

Other Resource Management Enhancements 60

7 Import Profiles 61

Multiple Item Creation 61

Support PO Line Reference Number as Match Point for Update Order 65

Support Deletion of Bibliographic Records and PDA Portfolios as Part of the Import Process 66

Repository Import Profile Supporting Holdings Call Number Update 69

Automatic Resolution of Multiple Matches 70

Other Import Profiles Enhancements 73

8 Fulfillment 74

Demerits – Virtual Block Assignment 74

Separate Privileges for the Return Workbench 78

Pick Up Requested Resources Report 78

Other Fulfillment Enhancements 81

9 Resource Sharing 82

Request Form Enhancements 82

Rota Management 90

Canceling Resource Sharing Borrowing Requests 93

Viewing Resource Sharing Lending and Borrowing Request Actions 98
Other Resource Sharing Enhancements 100
10 Collaborative Networks and Multi-Campus Institutions 101
Available For Enhanced to Group Settings for Consortia/ Multi-Campus Institutions 101
Expanded Support for Associating Patrons with Campus/Library 110
Including Network Zone in Google Scholar/Primo Central Publishing 111
Multi-Campus Support for Google Scholar/Primo Central Publishing 112
Multiple Matches Across the Institution Zone and Network Zone 116
11 Analytics 120
ARL Analytics Reports for Items Added and Item Withdrawals 120
Addition of Create Date and Modification Date to the Vendor Dimension in the Funds Expenditure Subject Area 121
Addition of Loaned By Dimension to the Fulfillment Subject Area 124
Addition of Material Type to the Portfolio Dimension in the E-Inventory Subject Area 129
Addition of External ID to the Fund Ledger Dimension in the Funds Expenditure Subject Area 131
Addition of Is Booking Loan to the Loan Details Dimension in the Fulfillment Subject Area 134
Other Analytics Enhancements 137
12 Primo 138
Direct Linking to Resource Sharing Form 138
Primo Request Submission 139
Other Primo Enhancements 139
13 Integrations with External Systems 140
OCLC Connexion Port Configuration 140
Other Integration-Related Enhancements 143
14 Alma RESTful APIs 144

15 Alma Menu and General Interface Changes 145

Main Alma Menu Modifications 145

Enhanced UI Tab Component with Visual Indication of Whether the Tab Contains Information or Is Empty 147

Other Interface Enhancements 148

16 Known Issues 149

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 November 2013 Release Highlights
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - Data Services
  - Alma Show Me How and Videos
  - Acquisitions
  - Resource Management
  - Import Profiles
  - Fulfillment
  - Resource Sharing
  - Collaborative Networks and Multi-Campus Institutions
  - Analytics
  - Primo
  - Integrations with External Systems
  - Alma Menu and General Interface Changes
- Known Issues

Alma November 2013 Release Highlights

Acquisitions

- Changing PO Lines Status/Import for Electronic Resources

  This enhancement allows for both existing and new electronic PO lines to automatically proceed to Closed status, without the need for the manual modification of the PO line status in Alma.

Resource Management

- Enhanced Authority Record Management

  This is a continuation of last month's improvements in this area, providing catalogers with a view of related authority records, and linked bibliographic records on the right side of a split screen as they are editing bibliographic records in the MD Editor. In addition, various improvements related to authority control functionality have been implemented.

- Automatic Creation of 866/867/868 Holding Fields

  This enhancement can help improve productivity by providing the option for automatically creating 866/867/868 fields in the holdings record from linked 853/854/855 and 863/864/865 fields.

- Expand Record from Template in MD Editor

  Catalogers will now be able to expand a record's data fields using a template. This is true for all types of records - bibliographic, holdings, and authority.

- Debugging Publishing Information

  This important enhancement provides staff users with tools for debugging issues regarding the publishing of materials to Primo. The More Info dialog box has been modified to include links to the Publishing Information page. The links are visible to staff members with Administrator roles (General, Catalog, Depositing, and Repository).

- Collection Resource Editor

  Core functionality for collection management has been completed for the November release of Alma and includes construction of sub-collections; assignment of thumbnails to collections; addition of items, sets, and remote bibliographic records/metadata to collections and sub-collections, and the integration of collection assignment with import profiles

Import Profiles

- Support for Deletion of Bibliographic Records and PDA Portfolios as Part of Import Process

  This enhancement supports deletion of bibliographic records that have no associated inventory, as well as portfolios that were created as part of a PDA program.

Collaborative Networks

- Available For Enhanced to Group Settings for Consortia/Multi Campus Institutions

  The Available For functionality has been expanded with Group Settings for consortial/ multi-campus environments. The tab has been renamed Group Settings and includes new parameter settings for the Available For groups.

- Including Network Zone in Google Scholar/Primo Central Publishing

  These enhancements allow for creating a holdings file for electronic resources that are managed in the IZ and NZ or that are specific to groups of campuses and libraries.

- Multiple Matches Across the Institution Zone and Network Zone

  This enhancement provides more information related to NZ matched records. It will help the operator choose which record to overlay or merge in cases of manual handling of records that have multiple matches in the NZ.

Fulfillment

- Demerits – Virtual Block Assignment

  This enhancement allows staff to configure a demerit system that lets them apply patron blocks (such as for loans) based on the number of demerits a user has accrued within a configured amount of time. Once a block is applied, the institution suspends the user for the configured number of days and subtracts the used demerit points from the user's record.

- Pick Up Requested Resources Report

  Staff users can now create an Excel report detailing a list of resources that need to be picked up. It can be used instead of printing separate call slips for each request. The Excel report can be sent to a printer, emailed to a user, or displayed on the screen.

Resource Sharing

- Rota Management

  This enhancement enables managing the partners in a rota. This includes adding, deleting, and changing the order of the rota members.

- Canceling Resource Sharing Borrowing Requests

  A new option allows for canceling resource sharing borrowing requests. Requests can be cancelled only if the request has not yet been shipped (such as with a status of Created Borrowing Request or Ready to be Sent). Cancellation messages are sent via the ISO protocol (if the partner is an ISO partner).

Analytics

- New Dimensions and Attributes Added

  A number of new dimensions and attributes have been added to Alma Analytics, such as Create Date and Modification Dates (of the vendor record) in the Funds Expenditure subject area, Loaned By dimension for Fulfillment reports and dashboards, and the material type field in the E-Inventory subject area.

- ARL Analytics Reports

  A standard ARL Analytics report configuration for generating reports for items added and items withdrawn is now available.

Primo

- Direct Linking to Resource Sharing Form

  Patrons can now access the Resource Sharing form directly from Primo instead of using the Citation Linker to perform resource sharing requests.

General

- New Icon for Tabs

  This enhancement provides an indication as to whether a specific tab (such as Notes and Attachments tabs) contains information or is empty.

Data Services

The Alma November 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 7-October-2013 through 17-November-2013:

- Cairn COUPERIN ECOSOCPOL
- CAIRN COUPERIN Humanities
- Cairn COUPERIN General
- CAIRN COUPERIN Psychology
- McGraw-Hill's eBook Library First Aid Test Prep
- Informa Healthcare Journals Current
- Informa Healthcare Journals Archive
- Sage IMechE Archive: 1847–1998
- American Society Of Civil Engineers ASCE eBooks
- CareKnowledge Journals
- Japanese E- Journals
- Digital Eighteenth Century Journals 5

Other Data Services Enhancements

- The $$U_SHIBBOLETH parameter was added to the Linking Parameters area of a package service. The relevant entity ID should be specified. In addition, the value **Yes** should be entered for $$SHIBBOLETH.
- For Chadwyck Literature Online, you must populate the $$SERVER_LOC parameter with a value corresponding to your geographic location. If you are accessing this service from Europe, the parameter value should be UK and not EUR.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the November 2013 release of Alma.

Alma Show Me How – November

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 November release, the following Show Me How scenarios are available:

   - Expand a Record Using a Template
   - Export List of Pick from Shelf Items
   - Automatically Create 866/7/8 Fields in Holding Record
   - Library-Level Publish to Google Scholar & Primo Central
   - Resolve Multiple Matches between IZ and NZ
   - PO Line Information in Vendor Import File
   - Allow Record Deletion in Import Profiles
   - Show Authority Record in MD Editor

Alma Videos – November

The following new videos are available when you select **Help > What's New Videos** in Alma:

- Expand a Record Using a Template
- Export List of Pick from Shelf Items
- Automatically Create 866/7/8 Fields in Holdings Record
- Library-Level Publish to Google Scholar & Primo Central
- Resolve Multiple Matches between IZ and NZ
- PO Line Information in Vendor Import File
- Allow Record Deletion in Import Profiles
- Debugging Publisher Information

Acquisitions

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

Changing PO Lines Status/Import for Electronic Resources

Description

The purpose of this enhancement is to:

- Avoid creating an e-activation task for electronic resources upon import. PO lines proceed directly to the next step in the workflow (**Closed**).
- Remove the items from the e-activation task list when automatically closing PO lines via the **Change PO Lines Status** process.

Technical Instructions

The following roles can enable existing PO lines to automatically proceed to the **Closed** status:

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

The following role can enable new PO lines to automatically proceed to the **Closed** status:

- Acquisitions Administrator

To avoid creating an e-activation task during import and to send PO lines directly to the Closed status:

1. On the Run Import page (**Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**), select **New Order** in the **Filter** drop-down list. The New Order import profiles display on the Run Import page.

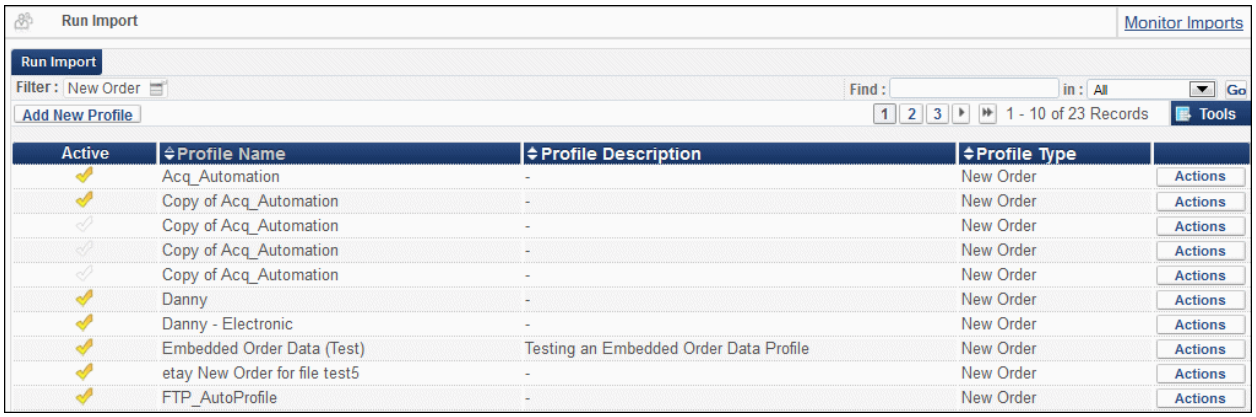


Figure 1 – Run Import Page

2 Select **Actions > Edit** for a profile. The Import Profile Details page opens.

3 Click the **Inventory Information** tab.

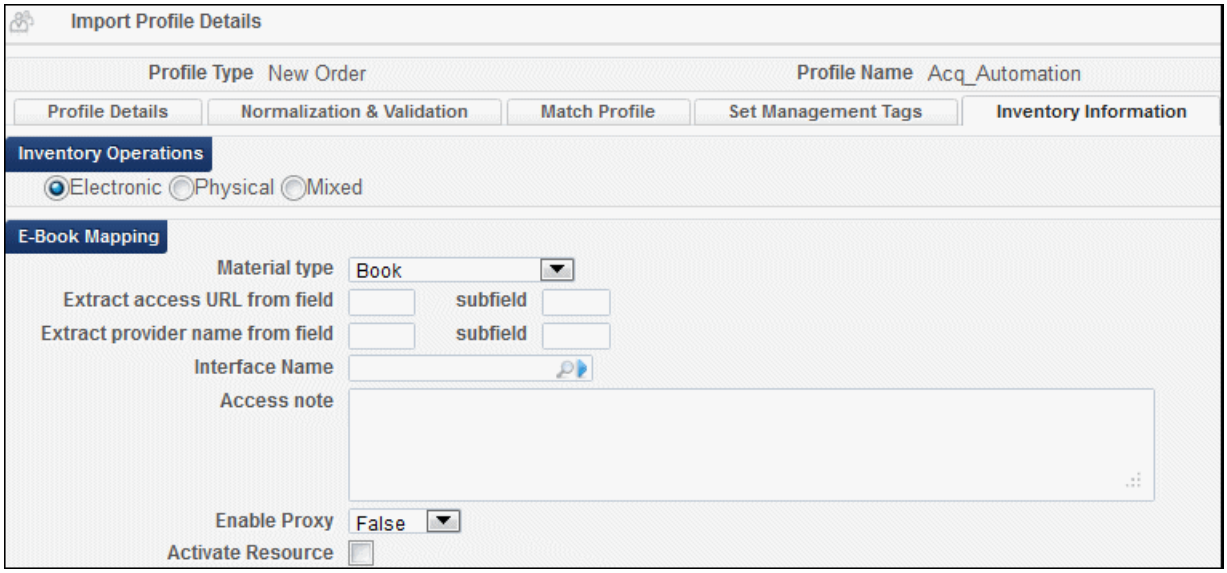


Figure 2 – Import Profile Details Page – Inventory Information Tab

4 In the Inventory Operations section, ensure that **Electronic** is selected.

5 Click the **PO Line Information** tab.

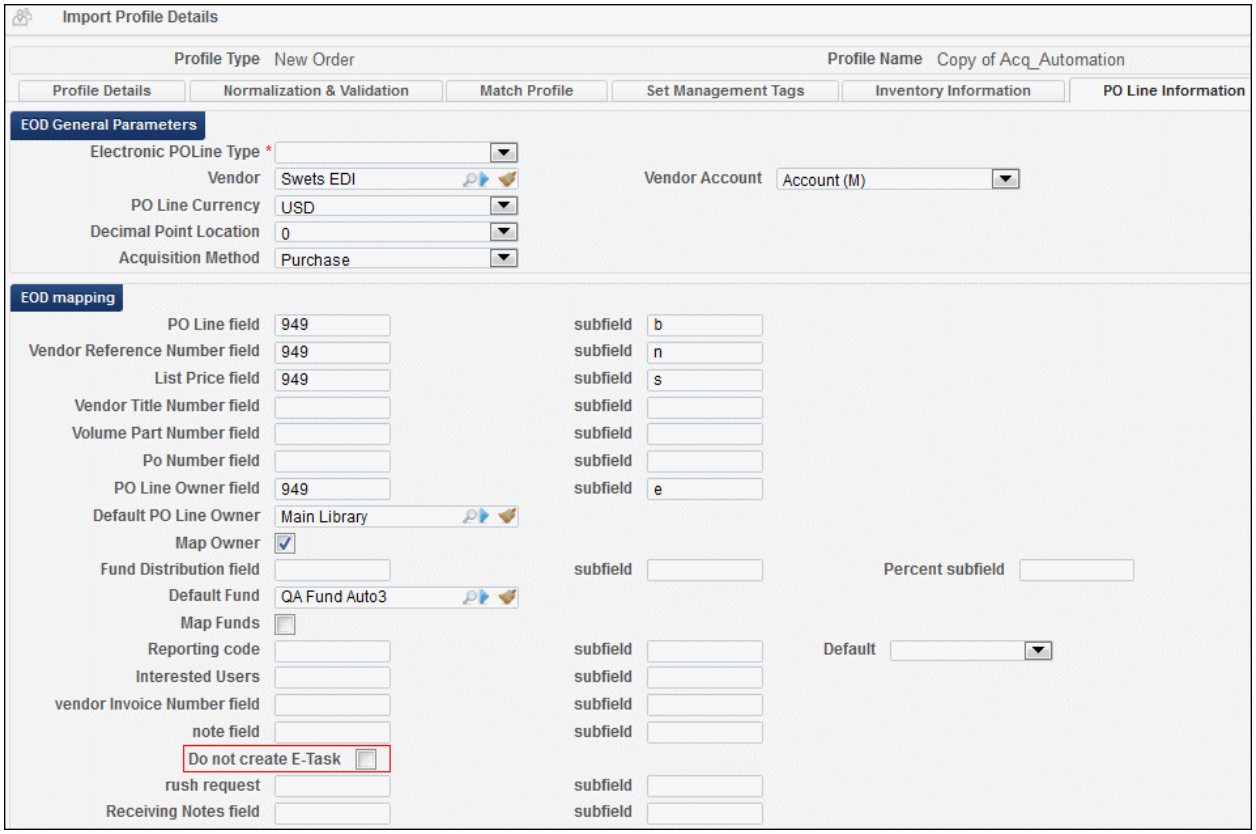


Figure 3 – Import Profile Details Page – PO Line Information Tab

6 In the E-Book Mapping section, select **Do not create e-task** and click **Save**. Newly created PO lines will proceed through the duration of the workflow, without requiring manual changing of the status.

To enable removing items from the e-activation task list when automatically closing PO lines:

1 On the Create Job — Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Change PO Lines Status** in the **Filter** drop-down list. The Change PO Lines Status jobs display on the Create Job — Select Job to Run page. This is the first page of the wizard.

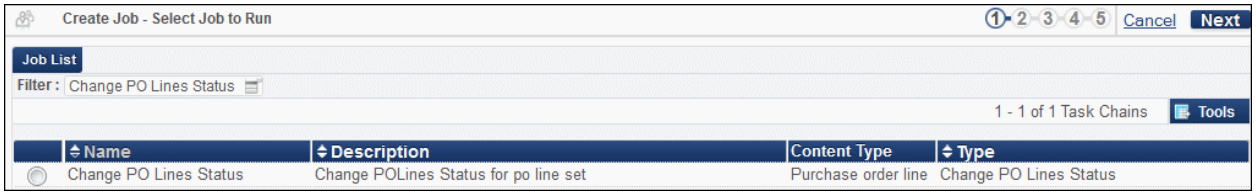


Figure 4 – Create Job – Select Job to Run Page

2 Select the job and click **Next**. The Create Job — Select Set page displays. This is the second page of the wizard.

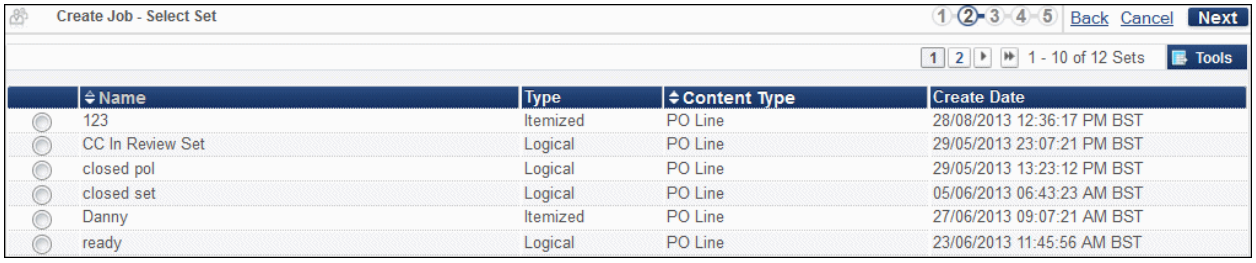


Figure 5 – Create Job – Select Set Page

3 Select a set and click **Next**. The Create Job — Enter Task Parameters page displays. This is the third page of the wizard.

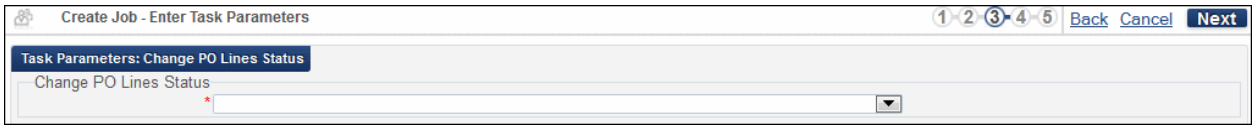


Figure 6 – Create Job – Enter Task Parameters

4 Select **Close PO Lines** in the drop-down field. The page refreshes and displays two check boxes.

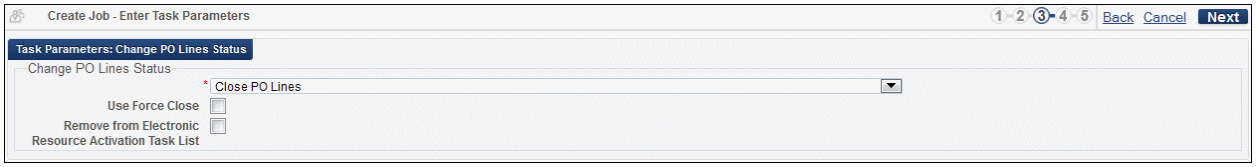


Figure 7 – Create Job – Enter Task Parameters Page

5 Select the **Remove from electronic resource activation task list** check box, and click **Next**. The Create Job — Job Details and Schedule page displays. This is the fourth page of the wizard.

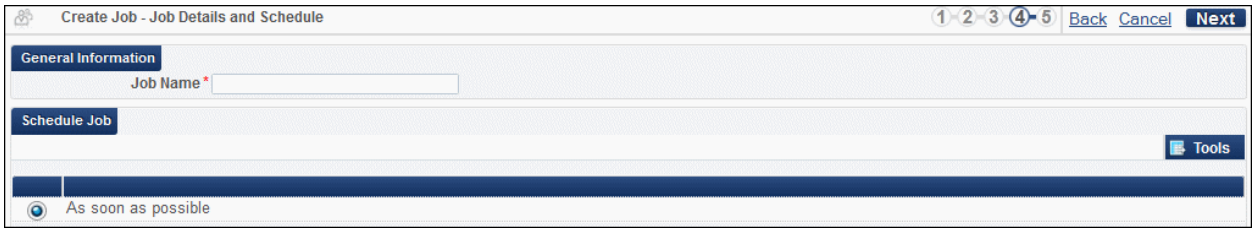


Figure 8 – Create Job – Job Details and Schedule Page

6 Enter a name for the job in the **Job name** field and ensure that **As soon as possible** is selected.

7 Click **Next**. The Create Job — Review and Confirm page displays. This is the fifth and final page of the wizard.

Figure 9 – Create Job – Review and Confirm Page

8 Verify that the displayed information is correct. If you want to modify any of the information, click **Back** to navigate to the previous pages of the wizard. If the information is correct, click **Save**. The job is created and its progress can be monitored on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

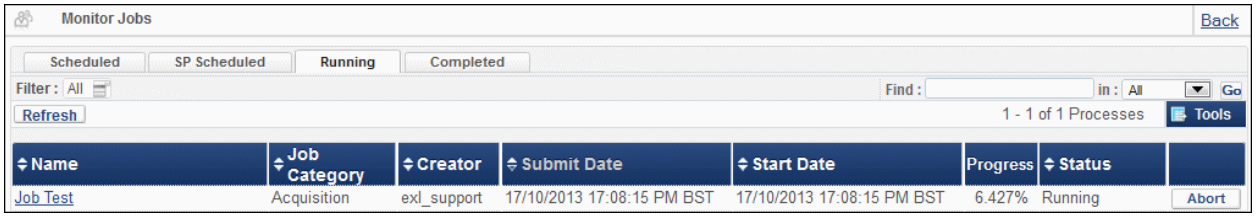


Figure 10 – Monitor Jobs Page

Improved Holdings Capabilities When Receiving PO Lines

Description

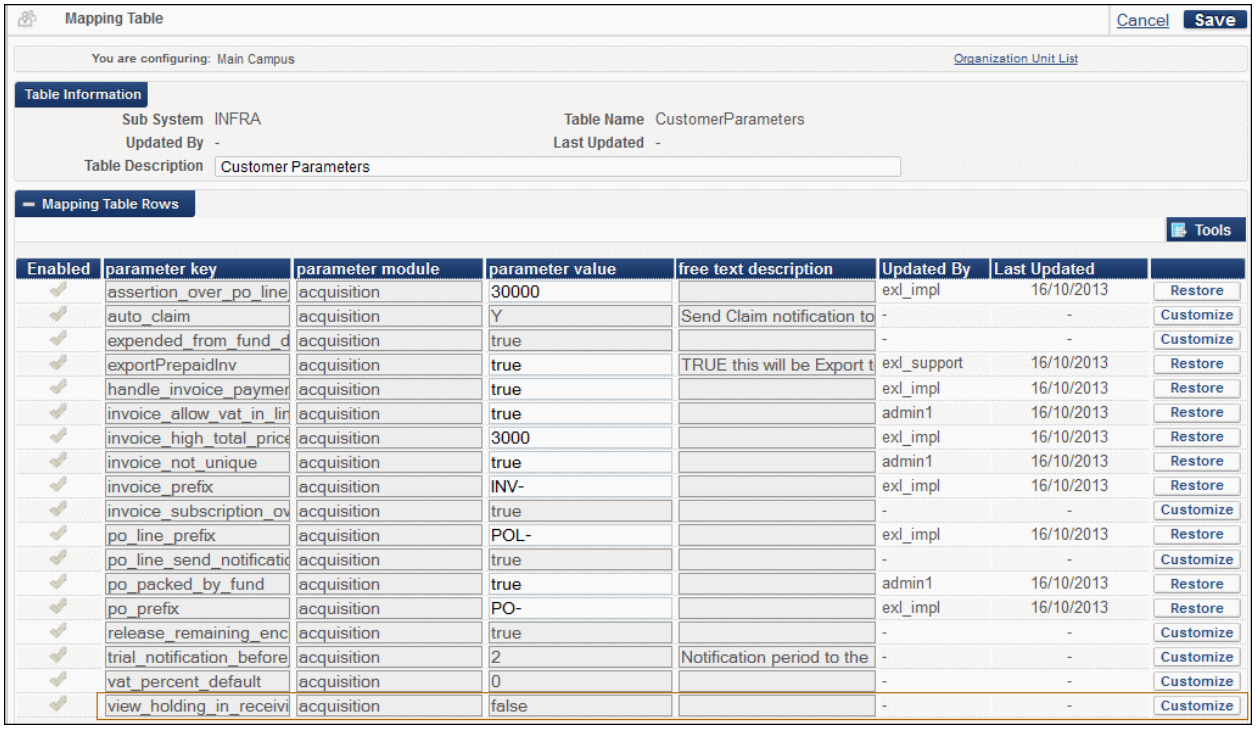
This enhancement enables viewing additional holdings information when receiving continuous PO lines.

Technical Instructions

The Acquisitions Administrator role can configure viewing holdings information when receiving continuous PO lines.

To configure viewing holdings capabilities when receiving PO lines:

1 On the Mapping Table page for customer parameters (**Acquisitions Configuration > Configuration Menu > General > Other Settings**), locate the **view_holding_in_receiving** parameter.



Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
✓	assertion_over_po_line	acquisition	30000		exl_impl	16/10/2013	Restore
✓	auto_claim	acquisition	Y	Send Claim notification to	-	-	Customize
✓	expended_from_fund_d	acquisition	true		-	-	Customize
✓	exportPrepaidInv	acquisition	true	TRUE this will be Export t	exl_support	16/10/2013	Restore
✓	handle_invoice_paymer	acquisition	true		exl_impl	16/10/2013	Restore
✓	invoice_allow_vat_in_lir	acquisition	true		admin1	16/10/2013	Restore
✓	invoice_high_total_price	acquisition	3000		exl_impl	16/10/2013	Restore
✓	invoice_not_unique	acquisition	true		admin1	16/10/2013	Restore
✓	invoice_prefix	acquisition	INV-		exl_impl	16/10/2013	Restore
✓	invoice_subscription_ov	acquisition	true		-	-	Customize
✓	po_line_prefix	acquisition	POL-		exl_impl	16/10/2013	Restore
✓	po_line_send_notificatic	acquisition	true		-	-	Customize
✓	po_packed_by_fund	acquisition	true		admin1	16/10/2013	Restore
✓	po_prefix	acquisition	PO-		exl_impl	16/10/2013	Restore
✓	release_remaining_enc	acquisition	true		-	-	Customize
✓	trial_notification_before	acquisition	2	Notification period to the	-	-	Customize
✓	vat_percent_default	acquisition	0		-	-	Customize
✓	view_holding_in_receivi	acquisition	false		-	-	Customize

Figure 11 – Mapping Table Page – Other Settings

2 Click **Customize** and modify the parameter value to **true**.

3 Click **Save**. When viewing receiving items, holdings information is displayed (see the following procedure).

To view holdings information when viewing receiving items:

1 On the Receive New Material page (**Receiving and Invoicing > Receive**), click the **Continuous** tab.

Ensure that you have selected an Acquisitions department in the **Currently at:** field at the top of the page.

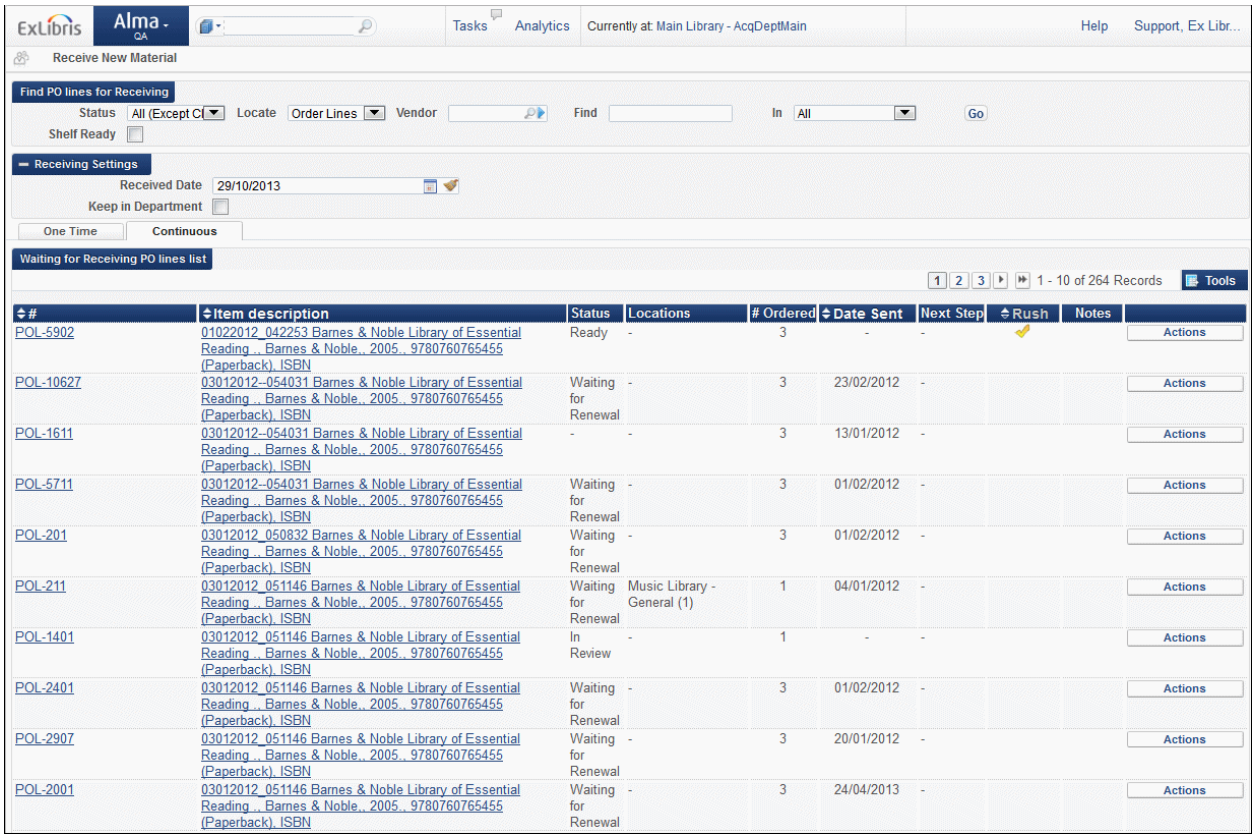


Figure 12 – Receive New Material Page — Continuous Tab

2 Locate a PO line that has a value in the **Locations** field, and select **Actions > Manage Items**. The Received Items List page opens.

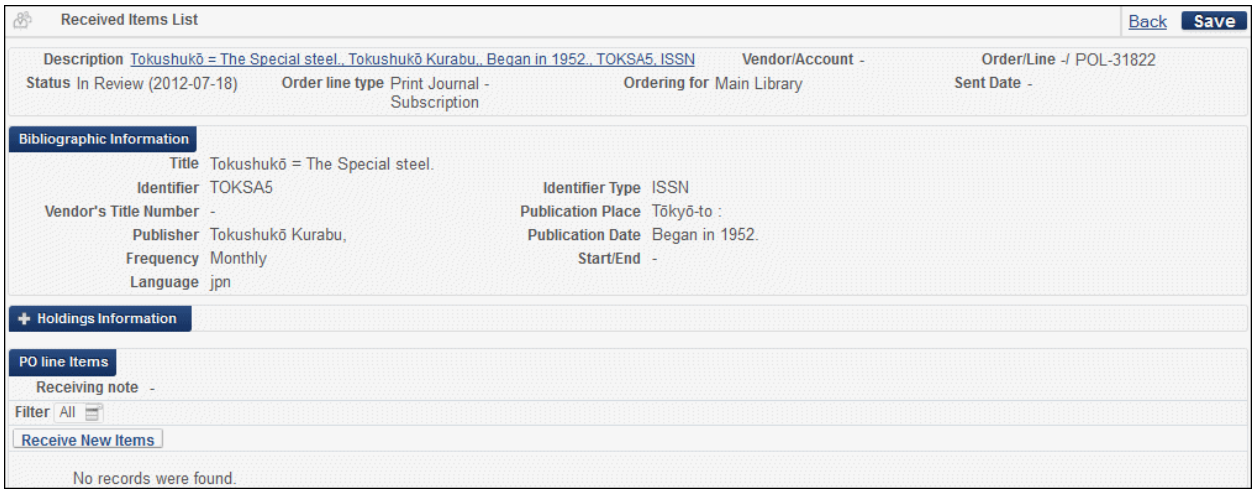


Figure 13 – Received Items List Page

3 Expand the **Holdings Information** section.

Figure 14 – Received Items List Page — Holdings Information Section

4 Select a value from the **Holdings** drop-down list. The metadata information for the selected holdings displays in the table underneath the **Holdings** drop-down list.

The value in the **Holdings** drop-down list indicates the holdings' Library, Location, Copy ID, and Call Number.

Note: If there is only one location listed for the selected PO line (that is, one value in the **Location** field on the Receive New Material page), a single holdings value displays instead of the **Holdings** drop-down list.

5 Optionally, click **Edit Holdings** to open the MD Editor page and edit the selected holdings.

Invoice Exchange Rates Exported to ERP

Description

The purpose of this enhancement is to enable exporting both explicit and implicit exchange rates to the ERP when multiple currencies are in use in an invoice.

The implicit exchange rate indicates the current market exchange rate between the indicated currencies.

Technical Instructions

The General System Administrator role can configure exporting exchange rates to the ERP.

To configure exporting exchange rates to the ERP:

1 On the Find Invoices page (**Receiving and Invoicing > Search for Invoice**), enter search criteria for an invoice in the **Find** field. The results display on the Find Invoices page.

Figure 15 – Find Invoices Page

2 Select **Actions > Go to task list**. The invoices are displayed according to assignment on the **Assigned to Me**, **Unassigned**, and **Assigned to Others** tabs.

3 On the **Assigned to Me** tab, select **Actions > Edit** for an invoice. The Invoice Details page opens.

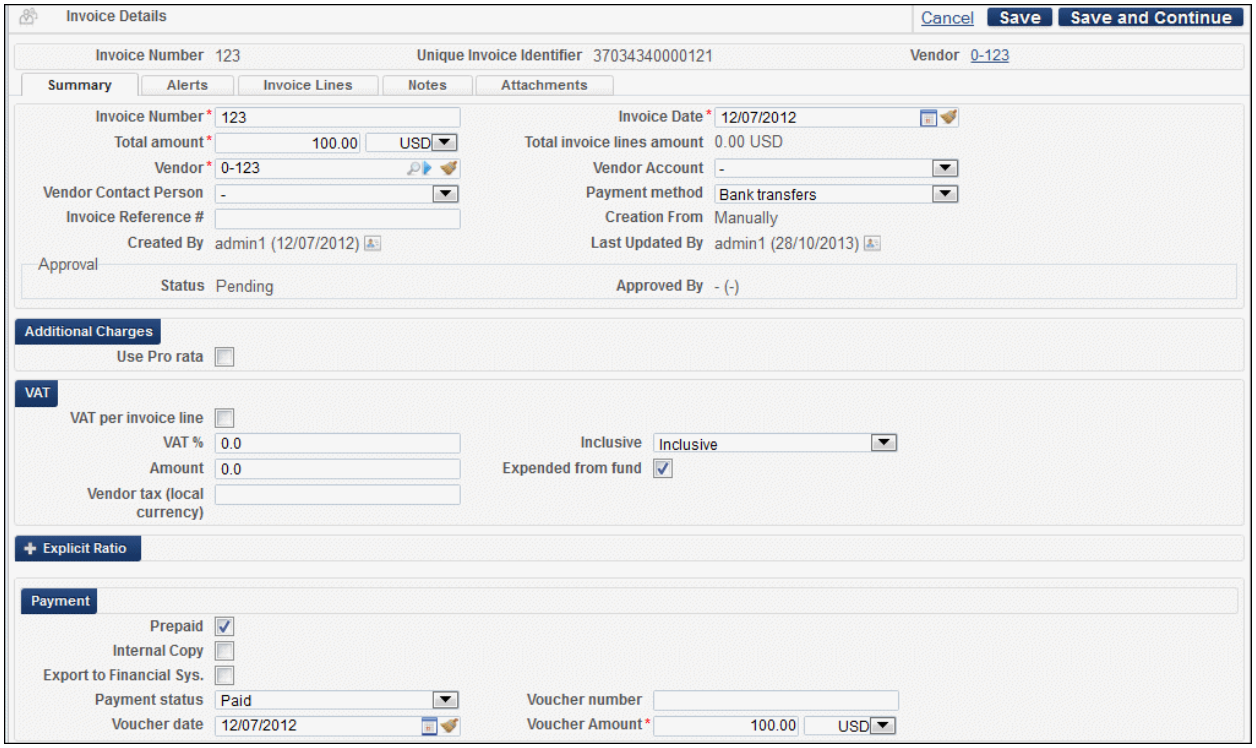


Figure 16 – Invoice Details Page

4 On the **Summary** tab, expand the **Explicit Ratio** section.

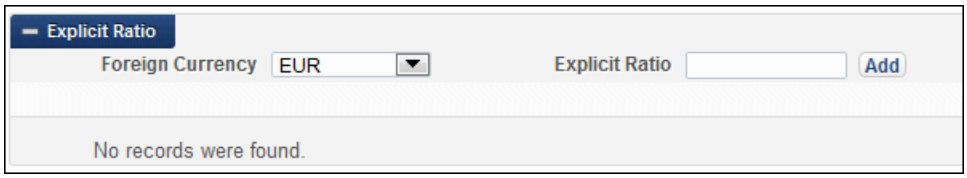


Figure 17 – Explicit Ratio Section — Expanded

5 In the **Foreign currency** field, select a currency for which you want to configure an exchange rate.

6 In the **Explicit ratio** field, enter an exchange rate for the specified currency relative to the invoice currency.

7 Click **Add**. The explicit ratio displays in the table in the **Explicit Ratio** section.

Figure 18 – Explicit Ratio Section With Configured Ratio

The configured explicit ratio is exported to the ERP system when the relevant setting is configured in the General Configuration menu (see the following procedure).

To enable exporting exchange rates to the ERP:

1 On the External System List page (**Administration > General Configuration > Configuration Menu > External Systems > External Interfaces**), locate a Payment system and select **Actions > Edit**. The External System page displays.

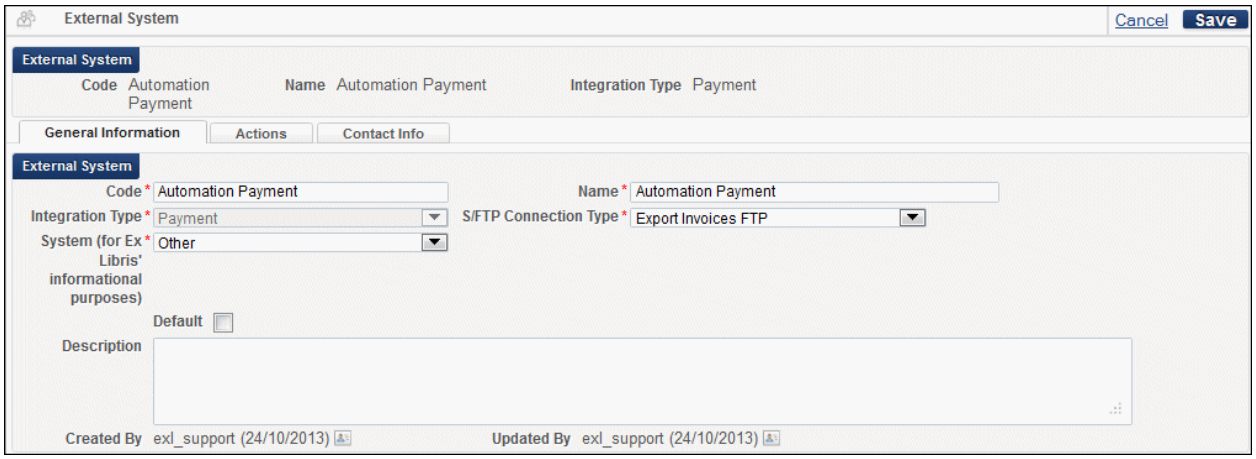


Figure 19 – External System Page

2 Click the **Actions** tab.

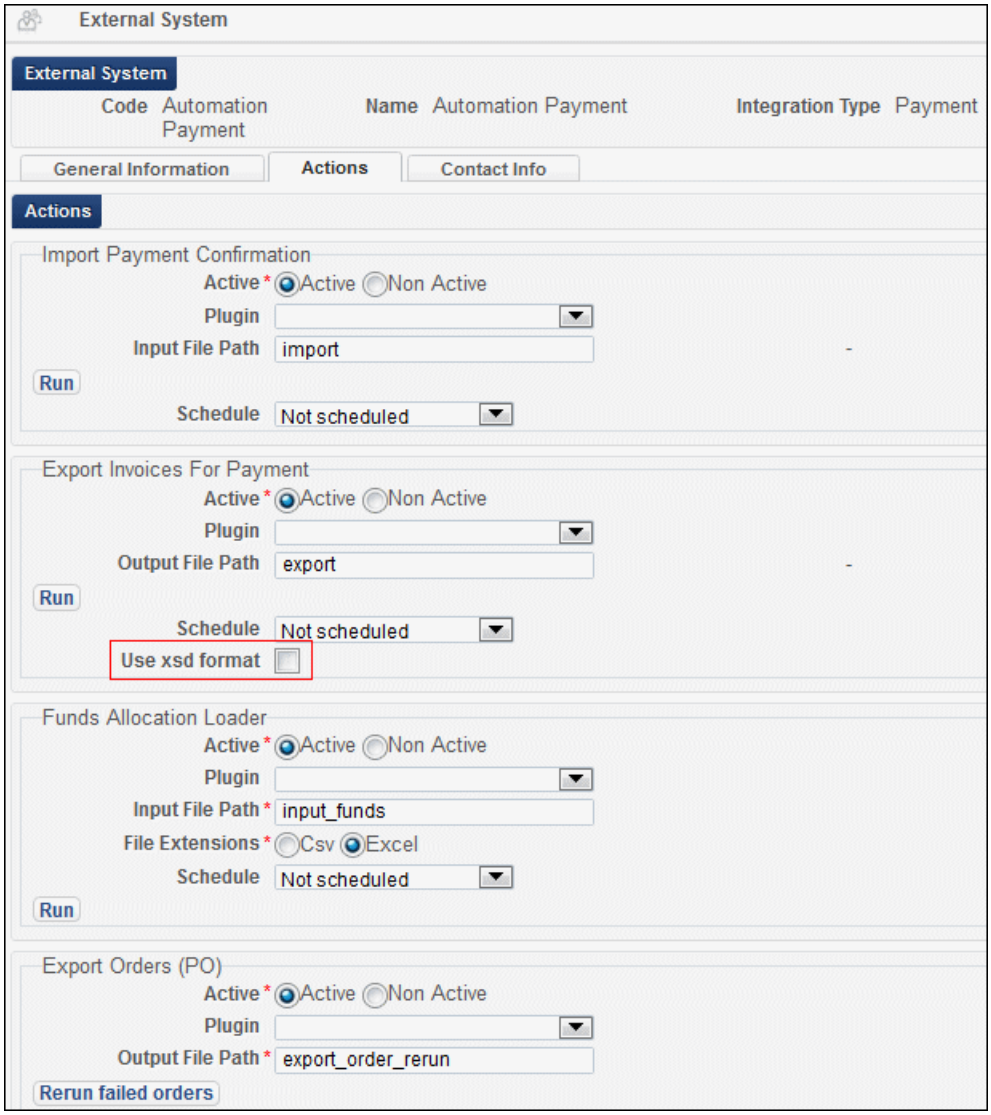


Figure 20 – Explicit Ratio Section — Expanded

3 In the **Export Invoices for Payment** section, select the **Use xsd format** check box.

4 Click **Save**. The updated external system is saved to the External System List page.

If an explicit ratio is configured in the Explicit Ratio section of the Invoice Details page (see the previous procedure), the specified ratio is exported to the ERP system.

If no explicit ratio is configured in the Explicit Ratio section of the Invoice Details page, the implicit ratio is exported to the ERP system.

If the **Use xsd format** check box is not selected, no ratio is exported to the ERP system.

An example of the exchange rate information displaying as a result of using the XSD format is shown in the figure below.

```
− <payment_data>
  − <invoice_list>
    − <invoice>
        <invoice_number>exchange_rate_explicit2</invoice_number>
      + <invoice_amount></invoice_amount>
        <vendor_code>SWETS</vendor_code>
        <vendor_name>Swets EDI</vendor_name>
        <vendor_FinancialSys_Code xsi:nil="true"/>
        <vendor_payment_address_list/>
        <unique_identifier>26600080000121</unique_identifier>
        <invoice_date>09/09/2013</invoice_date>
        <payment_method>ACCOUNTINGDEPARTMENT</payment_method>
      + <vat_info></vat_info>
      + <additional_charges></additional_charges>
      + <invoice_line_list></invoice_line_list>
      − <invoice_exchange_rate_list>
        − <exchange_rate>
            <currency>EUR</currency>
            <explicit_ind>true</explicit_ind>
            <rate>0.7</rate>
          </exchange_rate>
        − <exchange_rate>
            <currency>AUD</currency>
            <explicit_ind>true</explicit_ind>
            <rate>1.11</rate>
          </exchange_rate>
        − <exchange_rate>
            <currency>GBP</currency>
            <explicit_ind>false</explicit_ind>
            <rate>0.639182</rate>
          </exchange_rate>
        </invoice_exchange_rate_list>
      </invoice>
    </invoice_list>
  </payment_data>
```


Figure 21 – Exchange Rate Information in XML Output

EDI Enhancements

Description

The purpose of the EDI enhancements is to support receiving line exclusive invoices via EDI communication. **Line Exclusive** refers to a VAT parameter within the invoice, and is in addition to the current options of **Inclusive** and **Exclusive**. For details, see the procedure below.

Technical Instructions

The following roles can configure receiving line exclusive invoices:

- Invoicing Operator
- Invoicing Manager

To configure a line exclusive invoice:

1 On the In Review Invoices page (**Acquisitions > Receiving and Invoicing > Review**), select **Actions > Edit** for an invoice on the **Assigned to Me** tab. The Invoice Details page displays.

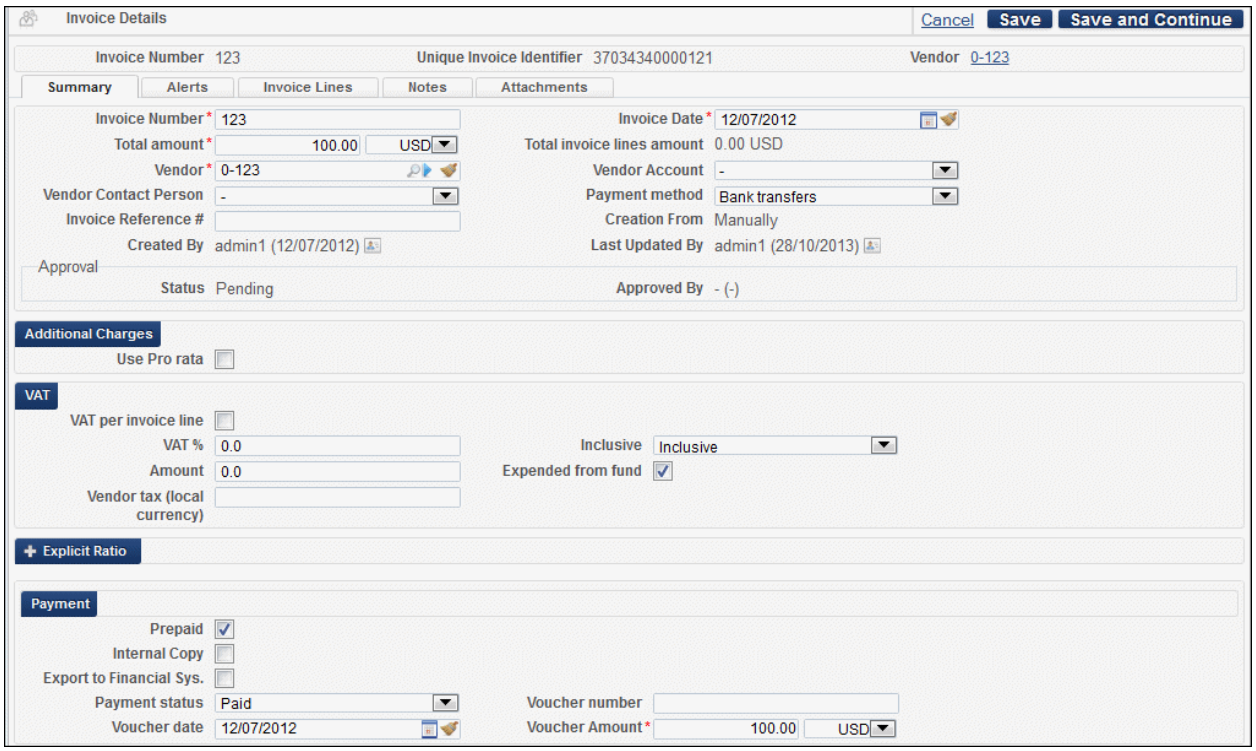


Figure 22 – Invoice Details Page

2 In the VAT section, locate the **Inclusive** field and select the relevant option:

- **Inclusive**: Indicates that the invoice's total amount includes the VAT. The VAT is included in the individual invoice lines.

  For example, if the invoice's Amount = 100 USD and the VAT = 10%, the Total Amount is 100 USD. This is calculated by adding the invoice lines amount of 90.91 USD and the VAT amount of 9.09 USD (90.91 + 9.09 = 100).

- **Exclusive**: Indicates that the invoice's total amount does not include VAT, and that VAT is calculated above the total amount.

  For example, if the invoice's Amount = 100 USD and the VAT = 10%, the Total Amount is 110 USD. This is calculated by adding the invoice lines amount of 100 USD and the VAT amount of 10 USD (100 + 10 = 110).

- **Line Exclusive**: Indicates that the invoice's total amount includes the VAT (similar to **Inclusive**), but the invoice lines' price does not. The VAT Amount is calculated above the invoice lines' price to give the total amount consisting of invoice lines + VAT amount. The VAT Amount is automatically configured as $10 (10% of $100).

  For example, if the invoice's Amount = 100 USD and the VAT = 10%, the Total Amount is 110 USD. This is calculated by adding the invoice lines amount of 100 USD and the VAT amount of 10 USD (100 + 10 = 110). The 10 USD is added to the invoice lines total, either to each invoice line (if **Expended from Fund** is configured for the invoice), or as a separate **Adjustment** line in the invoice that is added to the invoice lines total (if **Expended from Fund** is not configured for the invoice).

3 Click **Save**.

Other Acquisitions Enhancements

- When exporting information on electronic resources to be activated via the Electronic Resource Activation Task List to Excel (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**), the value displayed in the **Notes** tab for the task and the resource's URL are exported to the Excel file.
- The following options have been added to the **EDI vendor format** drop-down list on the Vendor Details EDI Information tab (for orders):
  - **Baker & Taylor enriched** – The file includes enriched data that is customized for Baker & Taylor. The GIR segment includes library and location information in two separate fields, even though the PO line may not include this data.
  - **Baker & Taylor not enriched** – The file does not include enriched data, only the data that is provided in the PO line. This option is not yet enabled and currently functions in the same manner as the **Other** drop-down list option.

  The **Harrassowitz** option removes line feeds, so that all of the information is provided on one line.

  Note that the above options or **Other** are the only options that should be selected. All the other options are for future use.

- Inactive funds can now be deleted instead of closed if they have no associated transactions. Existing closed funds have now been converted to the status **Inactive** so that they can be located and deleted, if required. Fund allocation and transfer transactions can now also be deleted.
- EBSCO invoice line notes are now loaded correctly via EDI.

Resource Management

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

Enhanced Authority Record Management

Description

This enhancement is a continuation of last month's improvements in this area and provides catalogers with a view of related authority records, bibliographic records, and linked bibliographic records on the right side of a split screen as they are editing bibliographic records in the MD Editor.

Technical Instructions

The following roles can access this enhancement:

- Cataloger
- Catalog Manager
- Catalog Administrator

To access this enhancement:

Edit any MARC record. After entering at least three characters and pressing F3, you automatically receive a drop-down list of related authority and bibliographic record headings.

Suggested Authority Headings

A **View** button has been added for each suggested authority record heading and the right side of the split screen has been enhanced so that a read-only version of the full authority record is displayed.

For example:

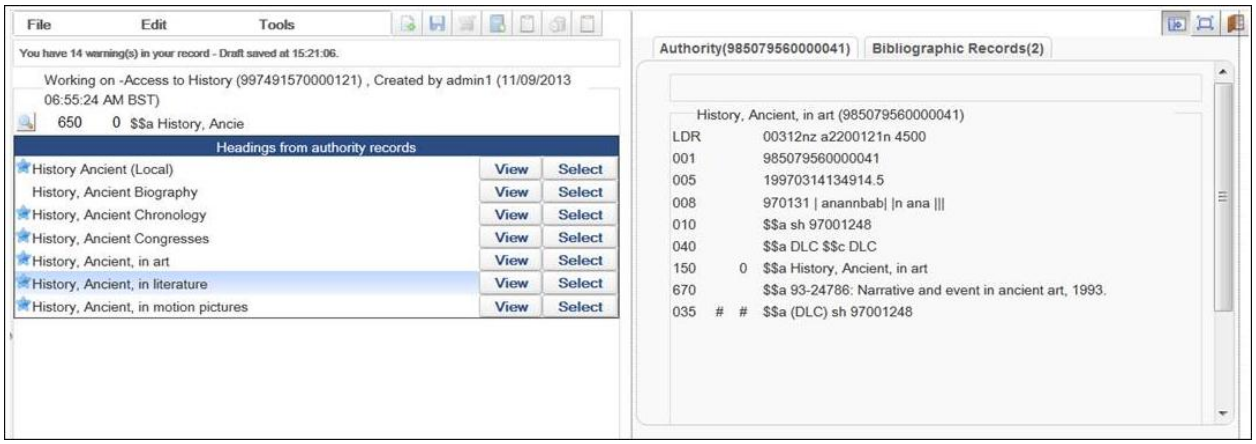


Figure 23 – View Authority Record

If the authority record is local, not locked by another user, and not already included in the authority draft list, you are able to add it to your authority draft list by clicking the **Add Record to Editing List** button.

For example:

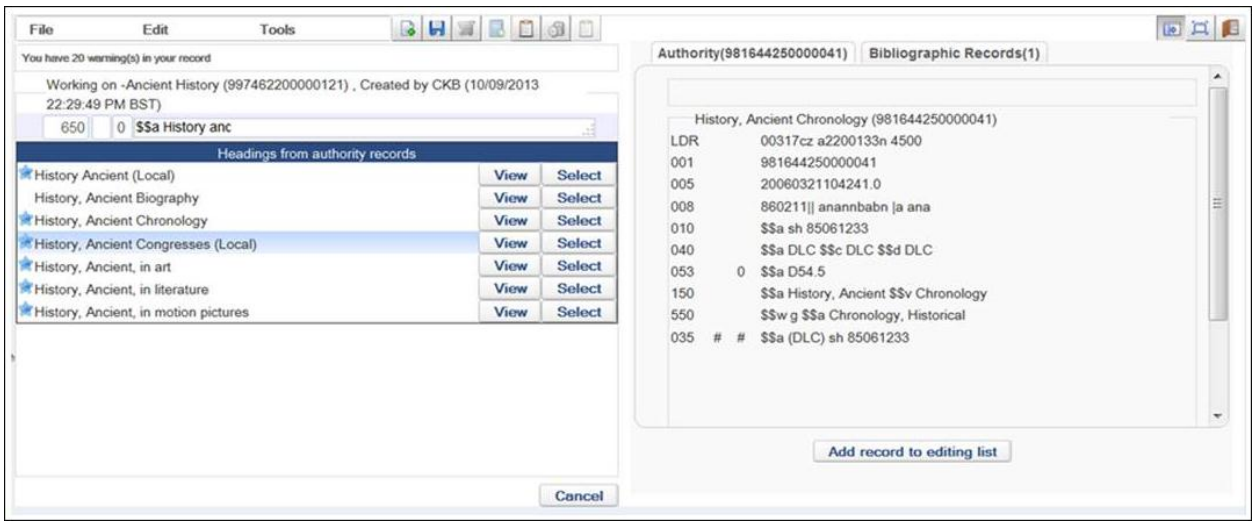


Figure 24 – View Local Authority Record

In addition, a **Bibliographic Records** tab has been added on the right side of the split screen, enabling you to view a list of local bibliographic records that are linked to the selected authority record.

For example:

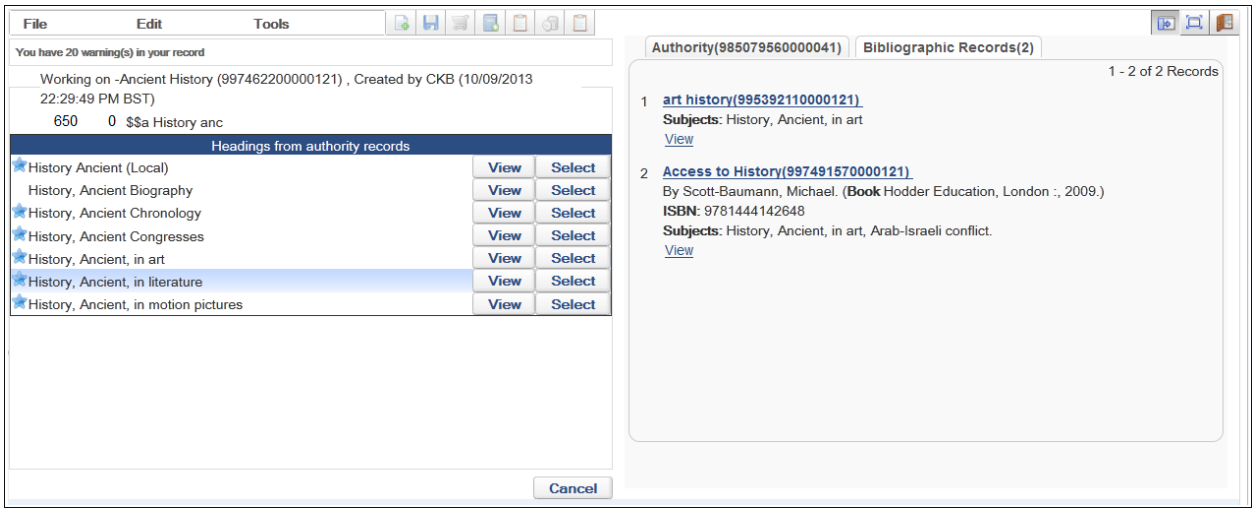


Figure 25 – View Linked Bibliographic Records

When you click the **View** link for a result, Alma displays a full, read-only bibliographic record.

Suggested Bibliographic Headings

As with suggested authority headings, a **View** button has been added for each suggested bibliographic record heading. In this case, the right side of the split screen has been enhanced to display a **Bibliographic Records** tab, which includes a list of local bibliographic records that contain the selected bibliographic record heading value.

For example:

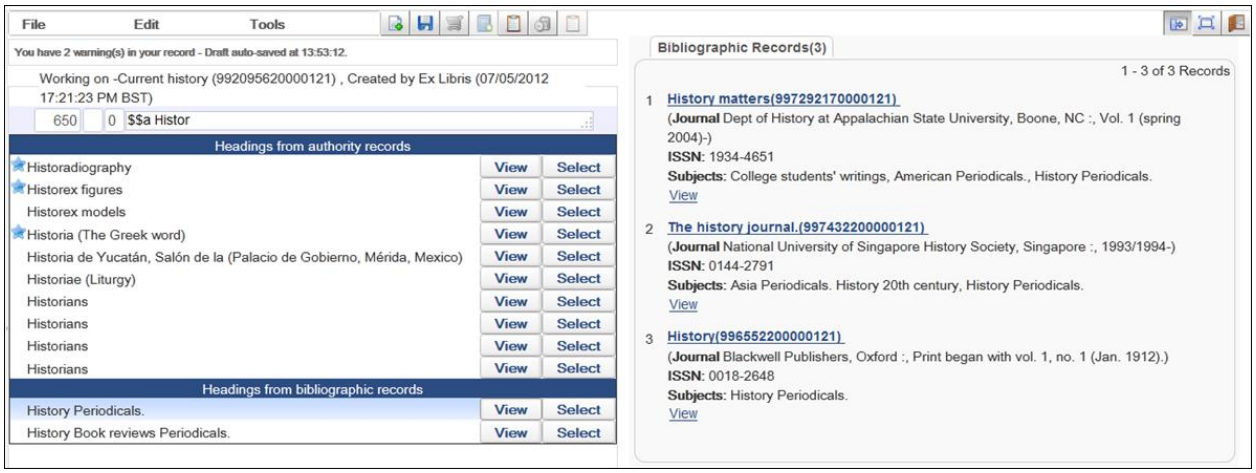


Figure 26 – View Bibliographic Records Tab

When you click the **View** link for each result, Alma displays a full, read-only bibliographic record.

Improvements for Authority Control

Description

The purpose of this enhancement is to provide improvements to authority control functionality. These improvements are being implemented in two phases: for the Alma November release and the Alma December release.

For the November release, the Authorities – Link bibliographic headings job has been fixed to work as expected. The job first searches all authority record fields, including subdivision fields, for complete terms listed in bibliographic records. If exact matches are found, the bibliographic records are linked to the corresponding authority records. If exact matches are not found, the subdivision fields are disregarded, a search of all authority records is performed once again, and the bibliographic records are linked to the matching authority records that are located during the second search.

For the December release, the following improvements are planned:

- Preferred term correction and job reporting (see Authorities – Preferred Term Correction Job Reporting (December) below)
- Updating of bibliographic records when authority records are updated
- Punctuation improvements for updated bibliographic records (see Punctuation (December) below)

Authorities – Preferred Term Correction Job Reporting (December)

With the December release, when the Authorities – Preferred Term Correction job is run, a bibliographic headings correction report, containing the following information, will be provided:

- MMS record ID
- Vocabulary code
- Field number
- Old value
- New value

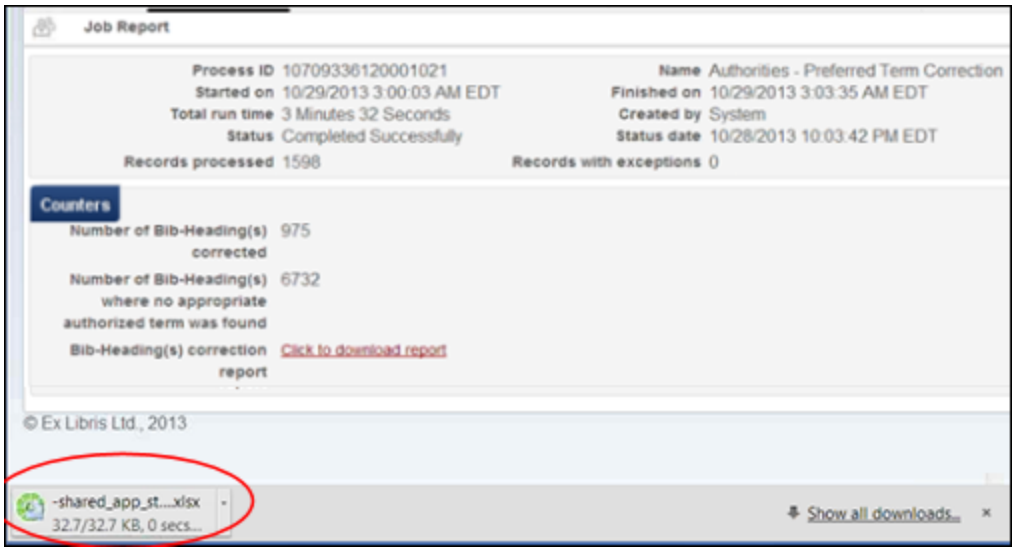


Figure 27 - Download the Bibliographic Headings Correction Report from Alma (.xlsx File)

A	B	C	D	E
MMS	Vocabulary code	Field number	Old value	New value
9999475400001021	LCNAMES	700	"$$a Sweitzer, Henry, $$d -1808?, $$e printer. "	"$$a Sweitzer, Henry, $$d 1771-1807, $$e printer. "

Figure 28 - Bibliographic Headings Correction Report Example

Punctuation (December)

In the December release, the following punctuation rules will be implemented when bibliographic records are updated from the authority database:

(1) Tag and Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
1####	a		.	.
1####	d		.	-.
100##	a	4	.	
100##	d	4	,	
110##	b		.	.
600##	a		.	.

(1) Tag and Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
600##	b	a	,	
600##	d	a	,	,
600##	d		.	.,
600##	q		.	).
600##	t		.	).
6####	a		.	-).
6####	v		.	.
6####	x		.	).
6####	y		.	.
6####	z		.	.
7####	a		.	-).
7####	a	4	.	
7####	a	e	,	
7####	a	d	,	-).,
7####	d	e	,	-).,
7####	c	e	,	-).,
7####	q	e	,	
7####	b		.	.,
7####	b	e	.	.,
7####	d		.	.,

(1) Tag and Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
7####	d	t	.	.
800##	t	v	;	;
810##	t	v	;	;
83###	a	v	;	;

Column (1) = This column specifies the tag and indicators to which the rule applies.

Column (2) = This column identifies the subfield to which the punctuation may need to be added. If nothing is specified in Column (3), the subfield in column (2) is assumed to be the last subfield specified for the tag.

Column (3) = This column specifies the subfield that follows the subfield in column 2 when punctuation may need to be added.

Column (4) = This column identifies the punctuation that is to be added when the rule conditions are met.

Column (5) = This column is used to determine whether or not the punctuation in column (4) is added to the subfield identified in column (2). It provides the following rule conditions:

- If any of the punctuation specified in this column exists, the punctuation specified in column (4) is not added.
- If there is no punctuation specified in this column (the cell is blank), the punctuation in column (4) is added if all other conditions are met.

Improvements to Local Authority Support

Description

The purpose of this enhancement is to provide improvements for local authority support. With the November release, the local vocabulary registry is enabled for local authorities. Once the local vocabulary registry is set up for your local authorities, you can create a metadata import profile that utilizes this local vocabulary for loading local authority records.

Technical Instructions

The following roles can access this facility:

- Catalog Administrator
- Catalog Manager
- Cataloger

To create a local vocabulary registry:

1. On the Resource Management Configuration page (**Resource Management > Configuration > Configuration Menu > Cataloging**), click **Metadata Configuration**. The Metadata Configuration List page opens.
2. Click **Manage Local Vocabularies**.
3. Click **Add Vocabulary**. The **Add Vocabulary** dialog box opens.

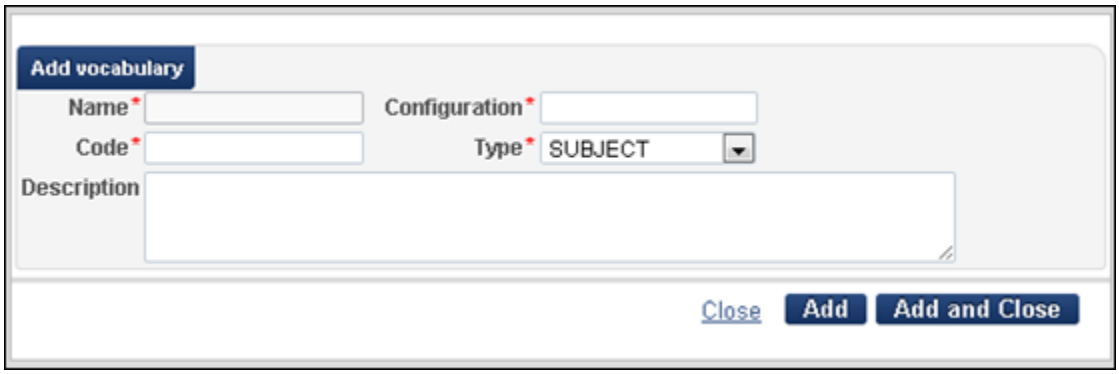


Figure 29 - Add Vocabulary Dialog Box for Local Authorities

4. Complete the information in the **Add Vocabulary** dialog box (see the table below for more information).

Parameter	Description
Name	Enter a name to identify this local vocabulary.
Configuration	Enter a name to identify this local vocabulary on the Metadata Configuration List page. This name displays in the Configuration column.

Parameter	Description
Code	Enter an identifying code for this local vocabulary that displays in the **Vocabulary code** drop-down list on the Import Profile Details page for authority profiles. Note: The code cannot be more than 8 characters long (although the system does not limit the code size). If a local vocabulary code is more than 8 characters long, authority records created for this vocabulary cannot be saved.
Type	Select from the following options available in the drop-down list: ▪ Subject ▪ Name ▪ Names and subjects
Description	Use this option to more fully identify the local vocabulary that you are creating.

5 Click **Add and Close**. The local authorities vocabulary that you created displays on the Local Vocabulary Registry page.

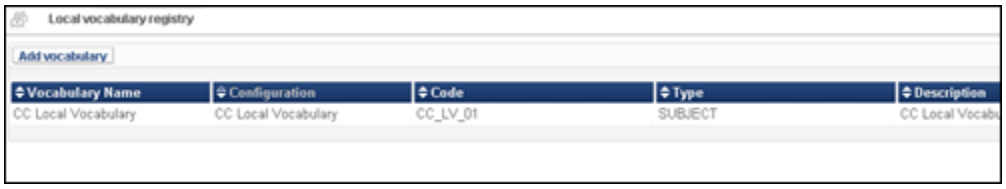


Figure 30 - Local Vocabulary Registration Page

6 Click **Save**. The local authorities vocabulary configuration that you created displays on the Metadata Configuration List page.

Figure 31 - Metadata Configuration List Page

You can now manually enter local authority records using the local authority profile that you configured.

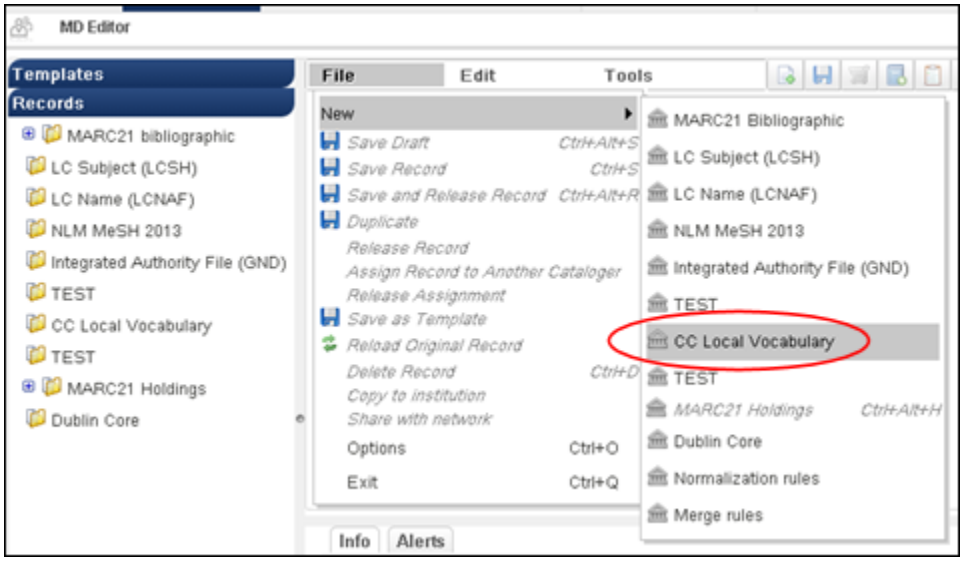


Figure 32 - Create Local Authority Record

To create a metadata import profile for loading local authority records:

1. On the Resource Management Configuration page (**Resource Management > Configuration > Configuration Menu > Record Import**), click **Import Profiles**. The Metadata Configuration List page opens.
2. Click **Add New Profile**.
3. For profile type, select **Authority** and click **Next**.

Figure 33 - Authority Profile Type Option

4. Complete the profile details to match your requirements. Specifically, notice that the vocabulary code from your local authority profile displays in the **Vocabulary code** drop-down list.

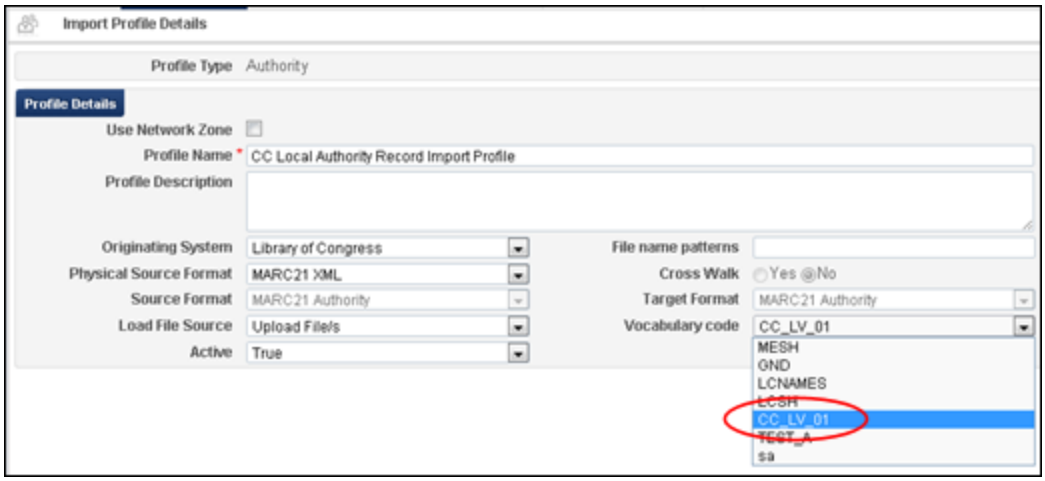


Figure 34 - Local Authority Code Displays in Vocabulary Code Drop-Down List

5 Click **Next**, complete the remaining import profile parameters, and click **Save**. You can now run a metadata import using this import profile to load your local authority records.

Normalization Improvements to the 035 Field for Search and Match Purposes

Description

The purpose of this enhancement is to improve the handling of Alma search, metadata import matching, single record matching, and so forth related to the 035 field. The 035 field may contain zero-padded data such as 0001234. Previously, a search for 1234 would not match a similar number with zero padding. The data in the 035 field is now being normalized and indexed so that a search for 1234 will find 0001234 as a match. This applies across multiple functions that use the 035 for match purposes in searching, importing, and so forth.

Note: The normalization improvements that enable the match enhancements will be completed at the beginning of December. The indexing improvements that enable the search enhancements will be completed at the beginning of January.

Processing Improvements with Automatic Creation of 866/867/868 Holdings Fields

Description

The purpose of this enhancement is to improve productivity by providing you the options to automatically create the 866/867/868 fields in the holdings record from linked 853/854/855 and 863/864/865 fields.

Technical Instructions

The following roles can access this facility:

- Catalog Administrator
- Catalog Manager
- Cataloger

To update your Metadata Configuration to automatically create the 866/ 867/868 fields in a holdings record:

1 On the Metadata Configuration List page (**Resource Management > Configuration > Configuration Menu > Cataloging > Metadata Configuration**), click the **MARC21 Holding** link in the Profile column.

Figure 35 - MARC21 Holding Profile Link

The Profile Details page opens.

2 Click the **Normalization** tab.

3 For the Populate 86X Fields row, select **Actions > Edit**.

4 Click the **Task List** tab.

5 From the Process List Pool section of the page, select the **marc21ExpandHoldingBy86XTask** process option and click **Add to Selection**.

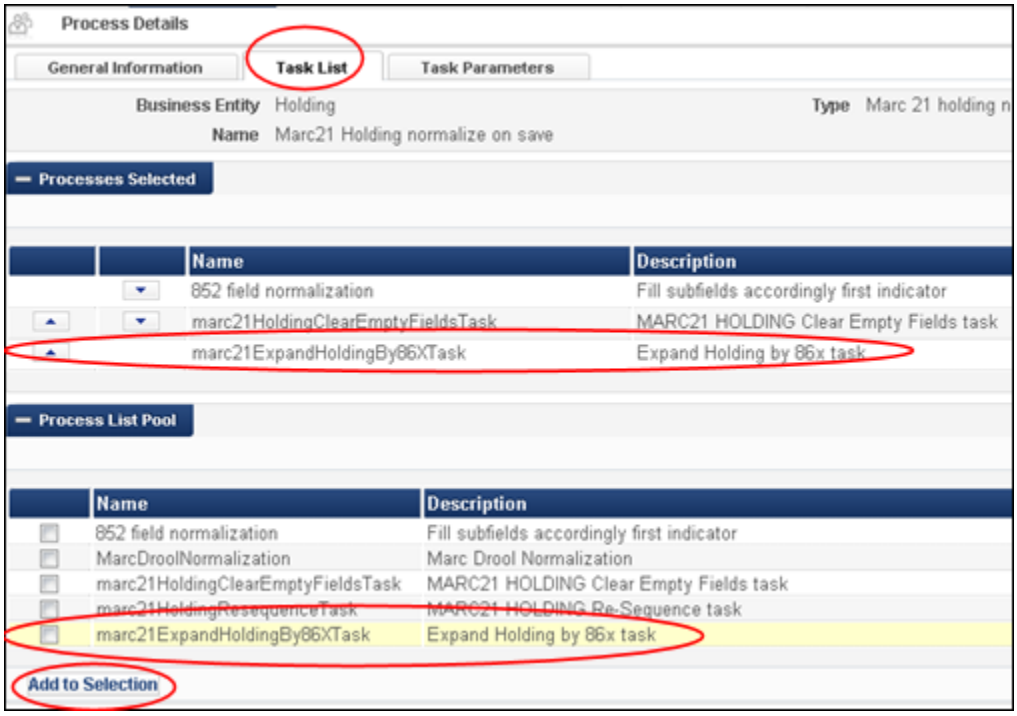


Figure 36 - Task List Tab - marc21ExpandHoldingBy86XTask Process Added to Selected List

6 Re-sequence the order of the Processes Selected list to match your requirements and click **Save**. You can now create a holdings record using the MD Editor and the system will automatically create the 866/867/868 fields from the 853/854/855 and 863/864/865 linked fields.

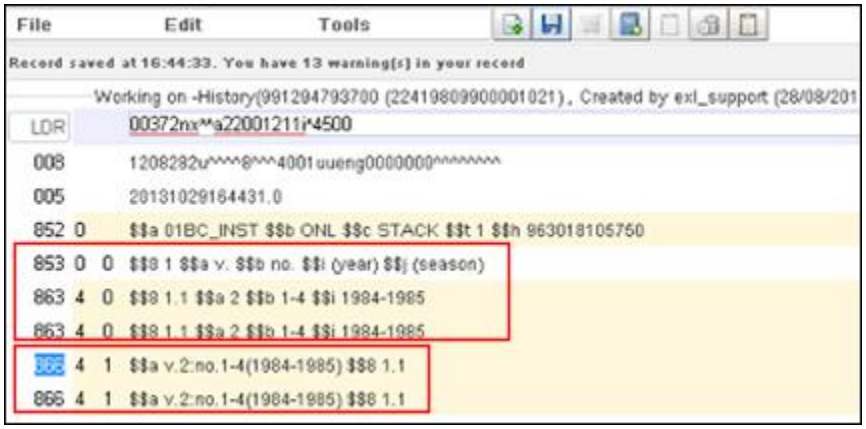


Figure 37 - Example of a Holdings Record with the 866 Fields Automatically Created

Expand Record from Template in MD Editor

Description

The purpose of this enhancement is to provide catalogers with the ability to expand a record's data fields using a template. The record may be any of the following types: bibliographic, holdings, or authority.

Technical Instructions

The following roles can access this enhancement:

- Cataloger
- Catalog Manager
- Catalog Administrator

To expand a record:

1 Open a record in the MD Editor by clicking **Edit** for a specific title in your search results. The record displays in the MD Editor.

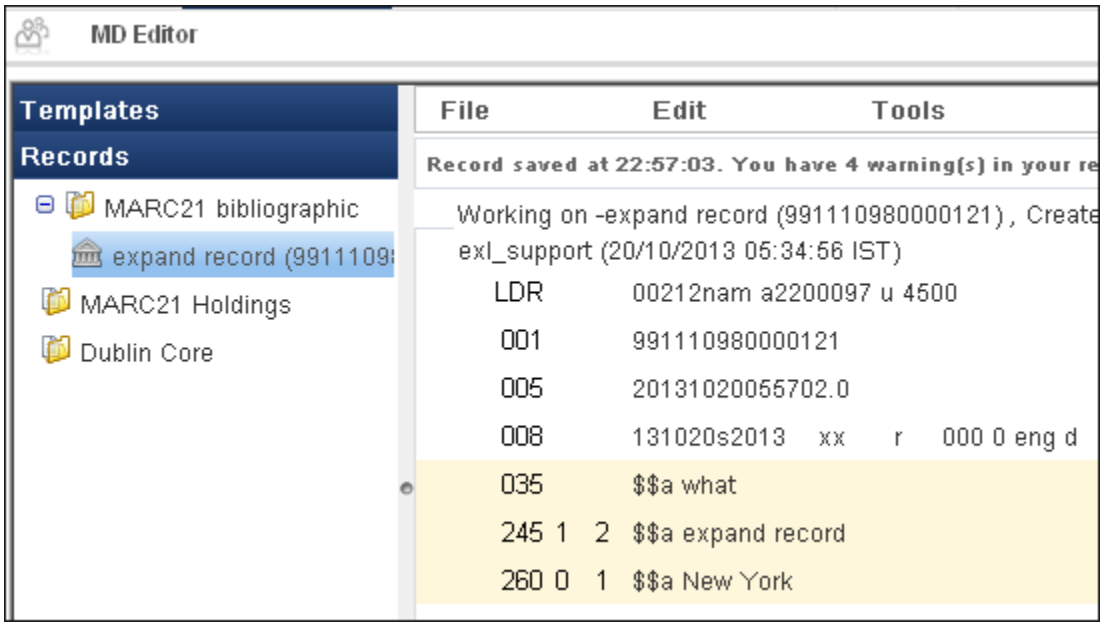


Figure 38 – Example Record before Expansion

2 Selectc **Edit > Expand from Template** to display the Expand from Template dialog box.

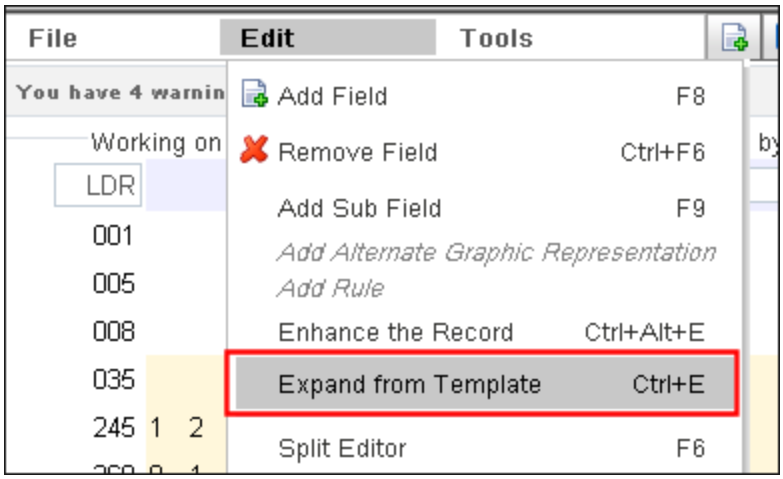


Figure 39 – Expand from Template Option in Edit Menu

The following template is used as an example:

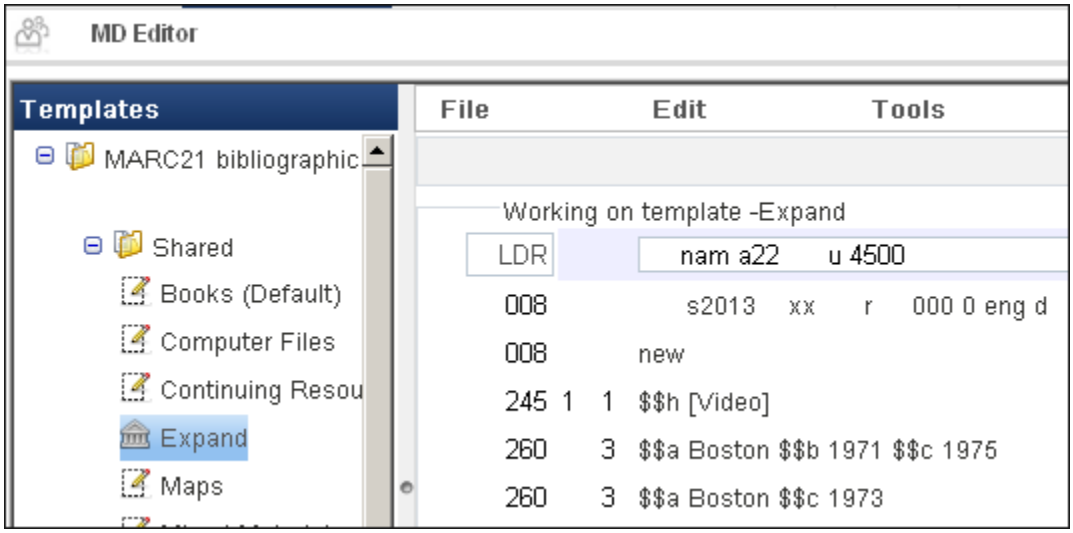


Figure 40 – Example Expand Template

3 In the Expand from Template dialog box, select a template from the **Choose Template** drop-down list and click **OK** to expand the record.

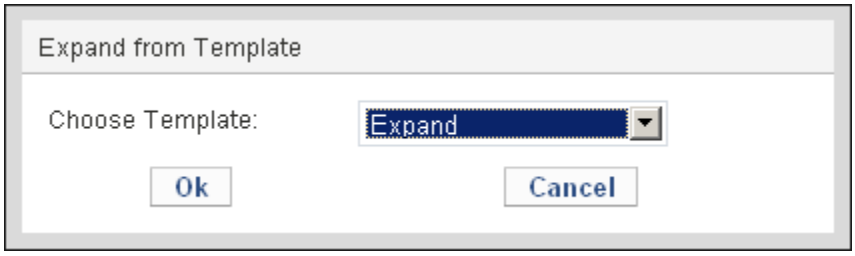


Figure 41 – Expand from Template Dialog Box

The following figure shows the expanded record, which includes new 008 and 260 fields and expanded 245 and 260 fields:

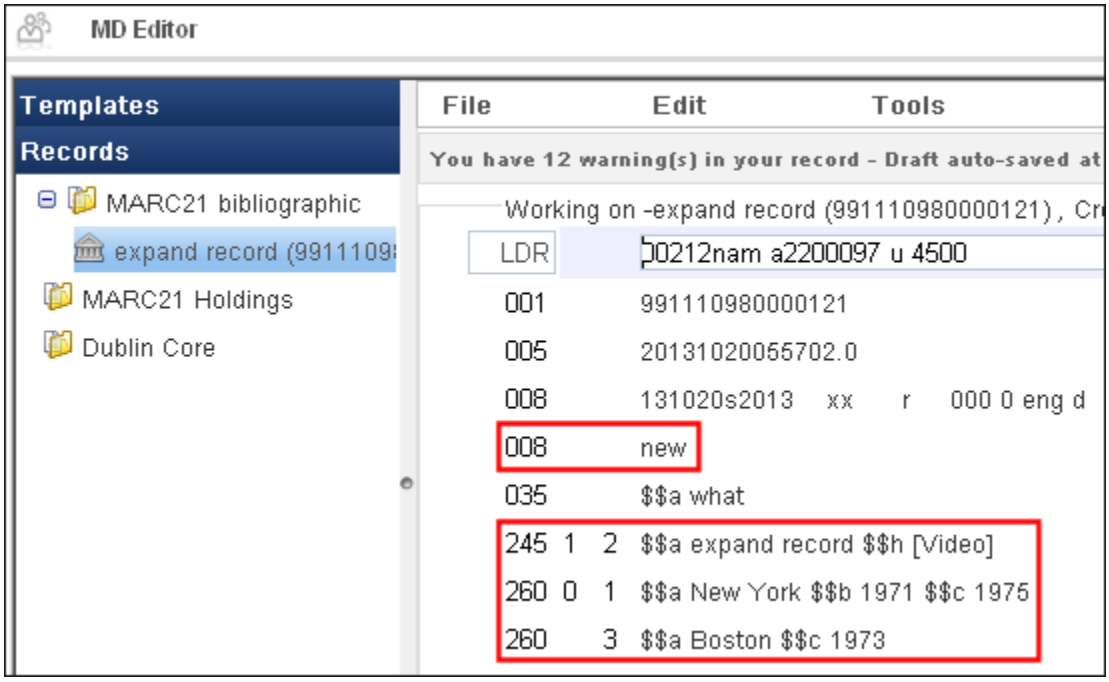


Figure 42 – Example Record after Expansion

Debugging Publishing Information

Description

The purpose of this enhancement is to provide customers with tools to debug issues regarding the publishing of materials to Primo.

The More Info dialog box (which displays after clicking **More Info** for an item returned via an all titles repository search) has been modified to include links to the Publishing Information page. The links are visible to staff members who have the following roles:

- General System Administrator
- Depositing Administrator
- Repository Administrator
- Catalog Administrator

For example:

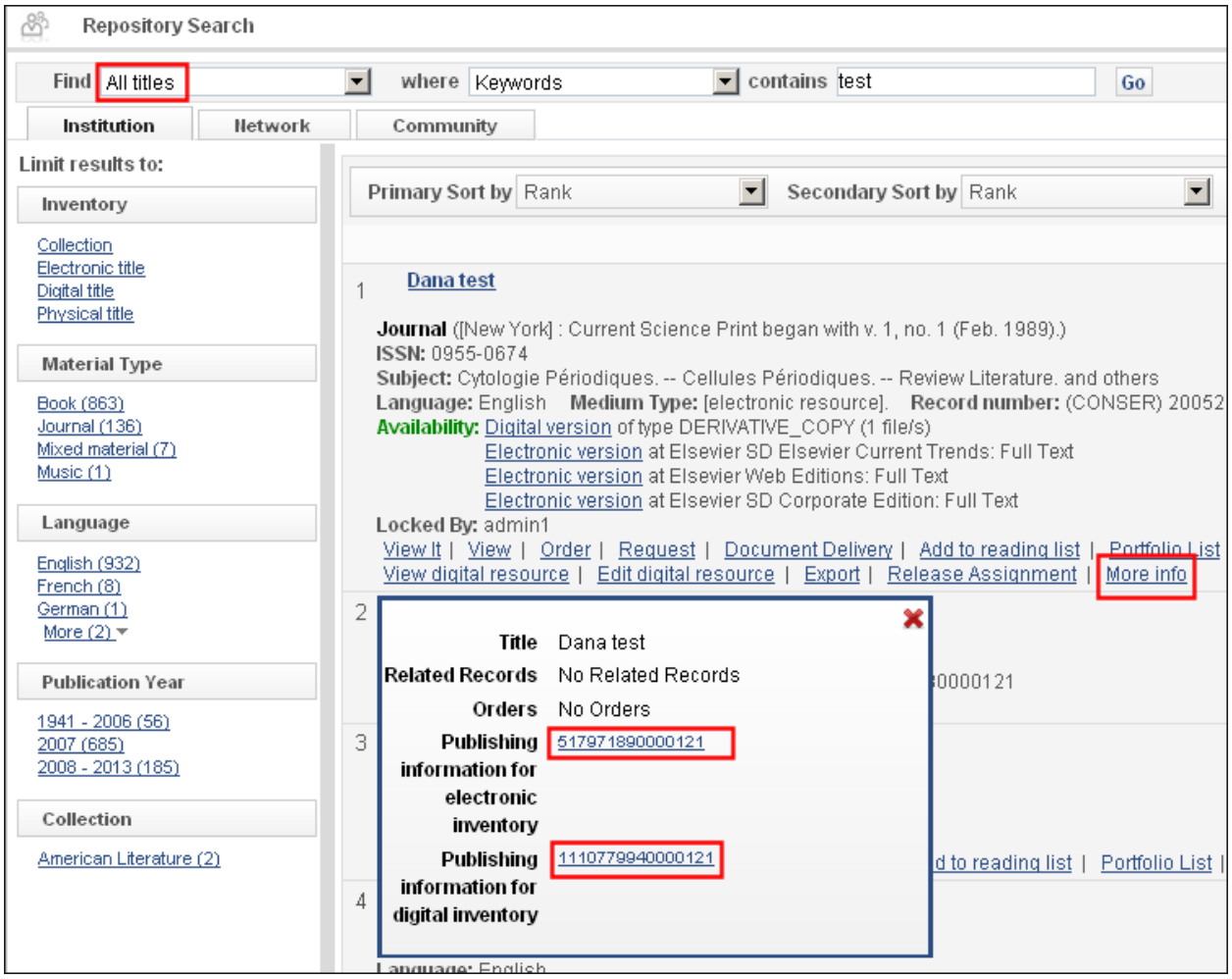


Figure 43 – Publishing Information Links in More Info Dialog Box

The More Info dialog box may contain up to one link for each of the following types of inventory:

- C (mixed inventory collections) – Publishing information for collection inventory
- D – Publishing information for digital inventory
- E – Publishing information for electronic inventory
- IEPA – Publishing information for electronic collection inventory
- IE_MMS (bibliographic records with no inventory) – Publishing information for IE_MMS inventory
- P – Publishing information for physical inventory

To display the publishing information for a type of inventory, click the relevant link in the More Info dialog box.

Note: The publishing information is still accessible by clicking the **Publishing Information** link for items that are returned via specific title searches (such as physical and electronic titles).

Export E-Inventory Job

Description

The purpose of this enhancement is to allow customers to export their electronic inventory to third parties.

The Export Electronic Portfolios job has been added to export active electronic portfolios that are included in the following types of sets: electronic portfolio, electronic title, and all titles.

The output format of the export file is based on the `institutional_holding.xsd` file, which is also used for Google Scholar. The schema has been updated to include the `interface_name` element.

Technical Instructions

The Repository Administrator role can access this enhancement.

To create and schedule the export e-inventory job:

4 On the Create Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Export** from the **Filter** drop-down list. The export jobs display in the list.

Figure 44 – Create Job – Select Job to Run Page

5 Select the row that contains the **Export Electronic Portfolios** job and click **Next**. The Create Job – Select Set page opens.

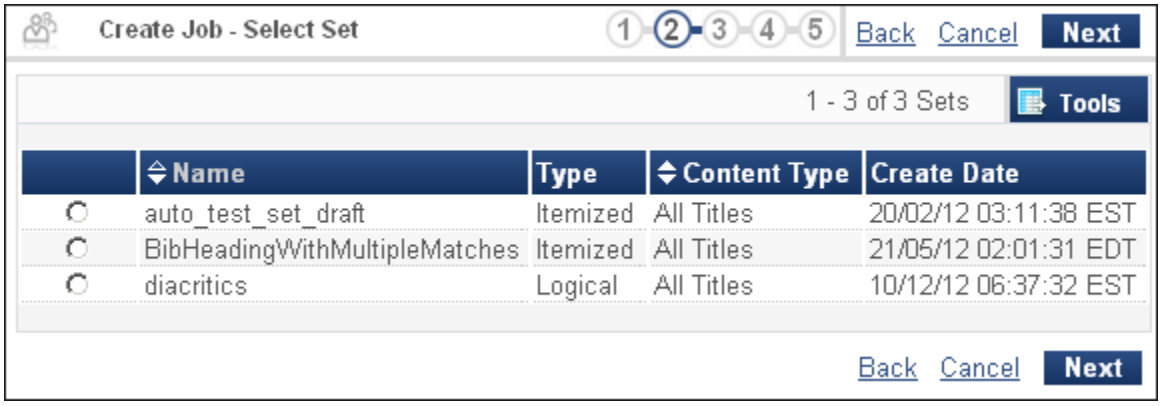


Figure 45 – Create Job – Select Set Page

6 Select the row that contains the set of portfolios that you want to export and click **Next**. The Create Job – Enter Task Parameters page opens.

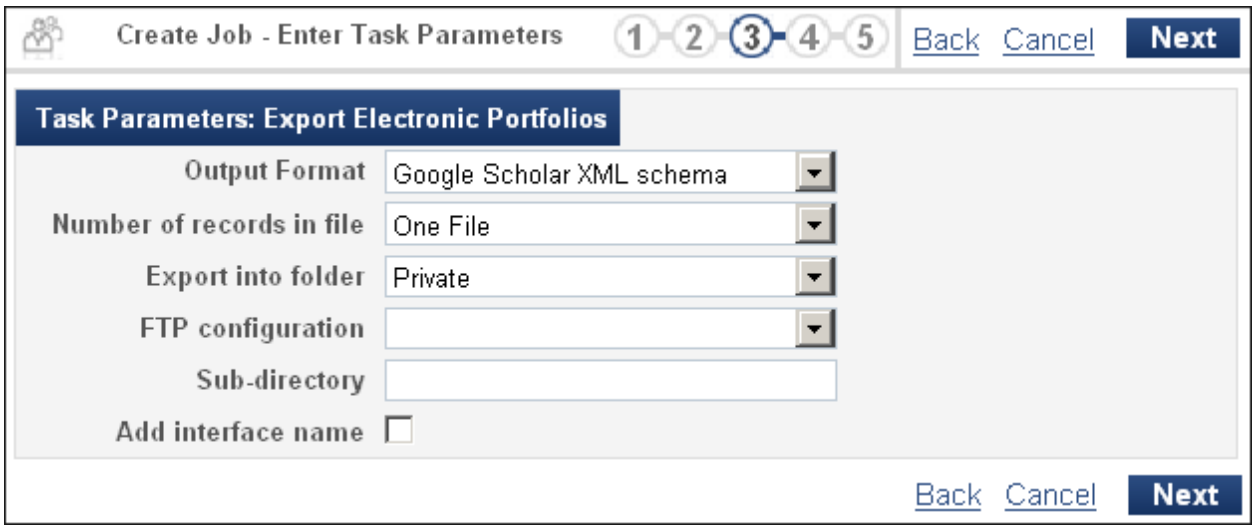


Figure 46 – Create Job – Enter Task Parameters Page

Note: The Content Type of the set must be **All Titles**, **Electronic Portfolio**, or **Electronic Titles**. Only active electronic portfolios are exported by the job.

7 Configure the following fields as needed:

- Output Format – Select **Google Scholar XML schema** from the drop-down list.
- Number of records in file – Select the number of records (not portfolios) to store per output file: **One File**, **1000**, **5000**, or **10000**.

- Export into folder – Indicates whether the export process is available to you only (Private) or to all users (Institution).
- FTP configuration – Specify the FTP configuration to be used from the drop-down list of available FTP configurations.
- Sub-directory – Specify the sub-directory in which the files should be placed for the FTP upload.
- Add interface name – Indicates whether the portfolio's interface name is included with the record. If the portfolio is part of a package, the record includes the interface name that is defined at the package level.

8 Continue to the remaining pages to schedule the job.

Top-Level Collection Page

Description

The purpose of this enhancement is to provide access to a page containing all top-level collections in the Alma system.

Technical Instructions

This page can be accessed by the Collection Inventory Manager Extended.

To access this page:

On the Configuration Menu page (**Resource Management > Resource Configuration > Configuration Menu > General**), click the **Top Level Collections** link.

The Repository Search page opens to a list of all the collections in the system.

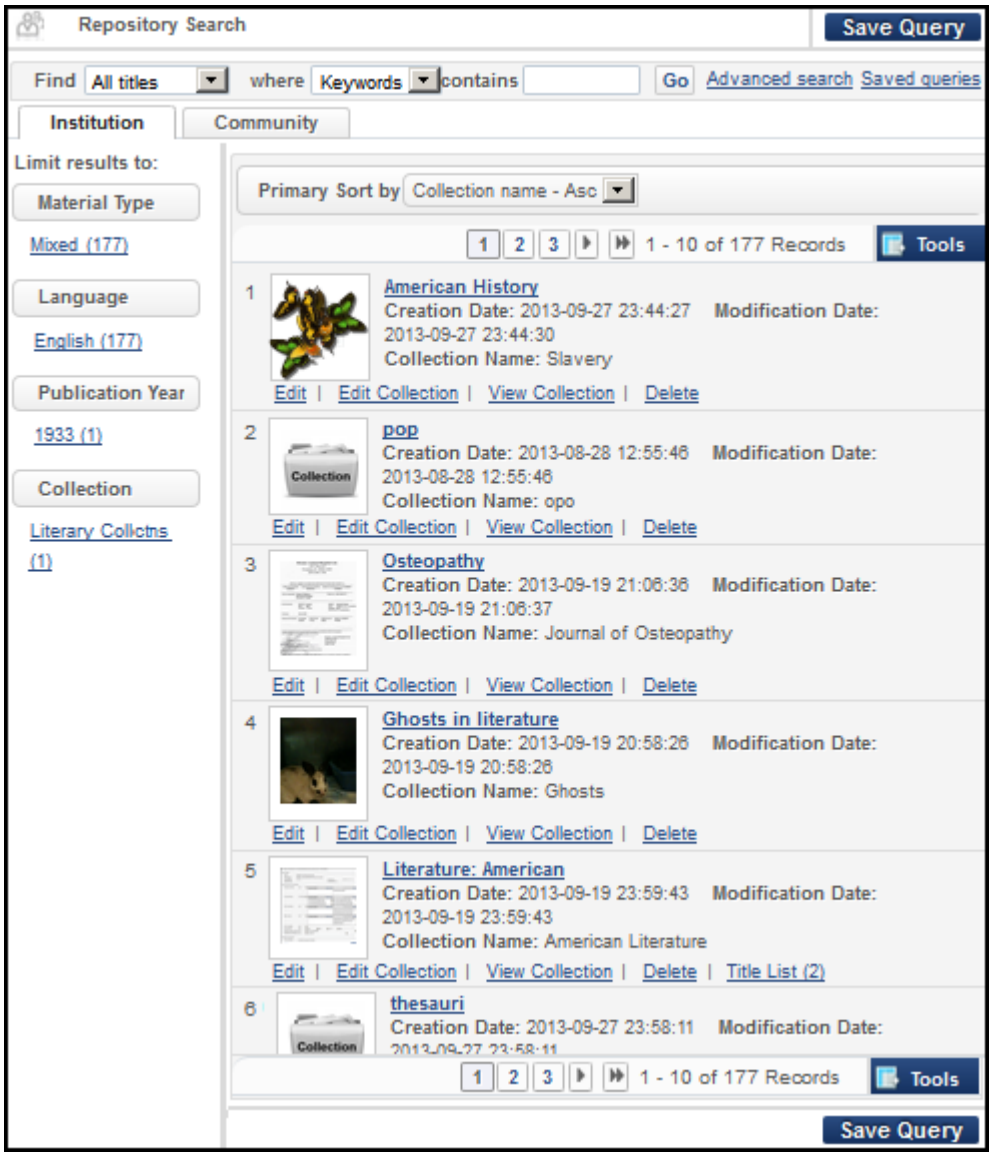


Figure 47 – Top-Level Collections Page in Alma

For details about the links on this page, see the Release Note, **Collection Resource Editor – Complete Remaining Functionality** on page 50. Complete information on top-level and sub-collections can be found in the Inventory section of the *Alma Resource Management Guide*.

Collection Resource Editor – Complete Remaining Functionality

Description

Collections are entities that allow libraries to group records of different types (physical, digital, and electronic) and from different sources (internal, external, remote) and organize them in a hierarchical structure. Digital asset management systems often use collections or similar entities to aggregate the many types of digital resources into organized units.

Core functionality for collections has been completed for the November release of Alma and includes:

- Construction of sub-collections
- Assignment of thumbnails to collections
- Addition of items, sets, and remote digital objects to collections and sub-collections

Note: Alma collections reference local and remote objects, but all remote objects remain in their remote locations while the Alma collection stores object metadata only.

- Integration of collection assignment with import profiles

This functionality builds on the top-level root collection management already in place from the October release of Alma. For the full discussion of all levels of collection management, see the Inventory section of the *Alma Resource Management Guide*.

Technical Instructions

The following roles can create, edit, and manage collections (not top-level) and sub-collections:

- Collection Inventory Operator
- Collection Inventory Operator Extended

To work with collections (that are not top-level), first access an existing collection using one of two methods:

- From the Resource Management configuration menu (**Resource Management > Resource Configuration > Configuration Menu > General**), click **Top Level Collections**.

Figure 48 – Top-Level Collections on Resource Management – Configuration Menu.

- Perform a search (**Resource Management > Search and Sets > Repository Search**), and use the filter to display only Collections.

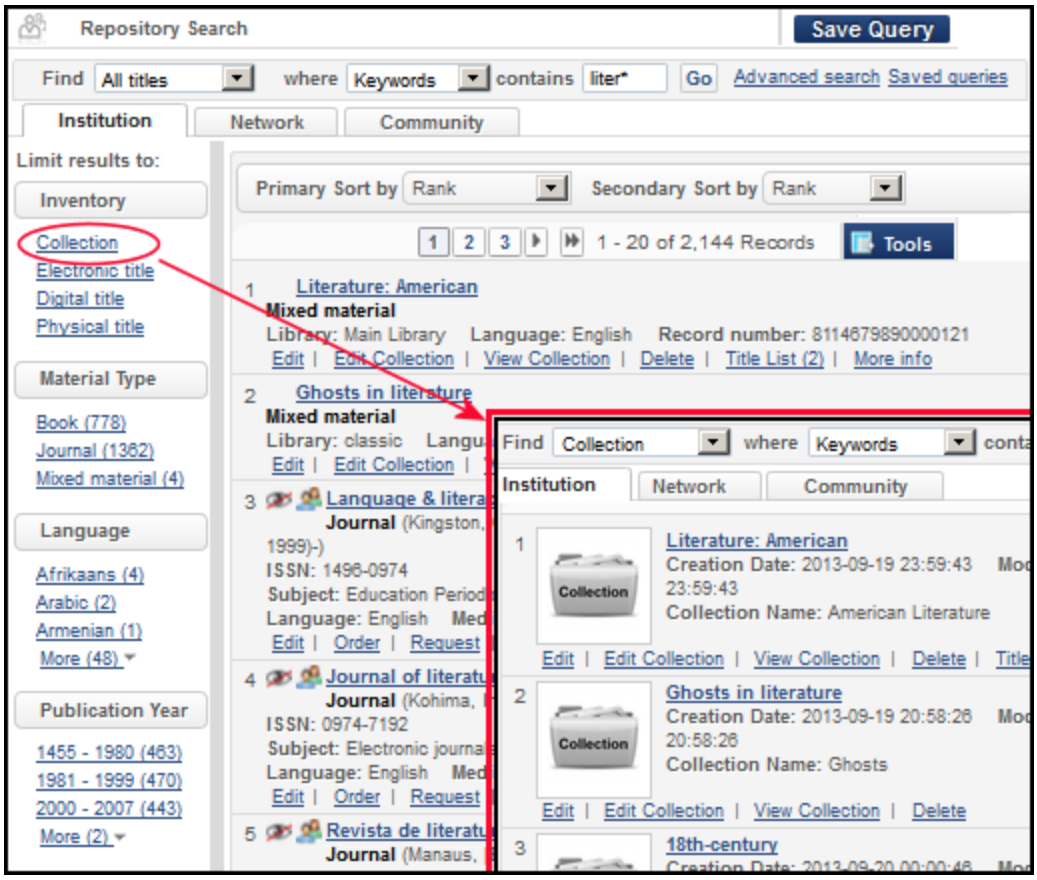


Figure 49 – Filtering for Collections

From the list of available collections, under each brief listing, at least four links are available:

- **Edit**: opens the collection for viewing in the MD Editor
- **Edit Collection**: opens the collection for viewing in the Collection Resource Editor (see below)
- **View Collection**: opens the collection in the Collection Resource Editor without the ability to edit, apply, or save changes
- **Delete**: allows you to delete the collection if it does not contain any sub-collections or items.

Additional links may also appear on the same line:

- **Title List (#*titles*)**: Lists all the sub-collections of this collection
- **More info**: Displays related information, such as related records and publishing information, in a pop-up box on the page.

To create a new collection or sub-collection:

1 From the list of available collections, access the parent collection for your new collection and click **Edit Collection**. The Collection Resource Editor page opens to the Summary tab, which displays title and library information for your parent collection as well as thumbnail information and identifiers.

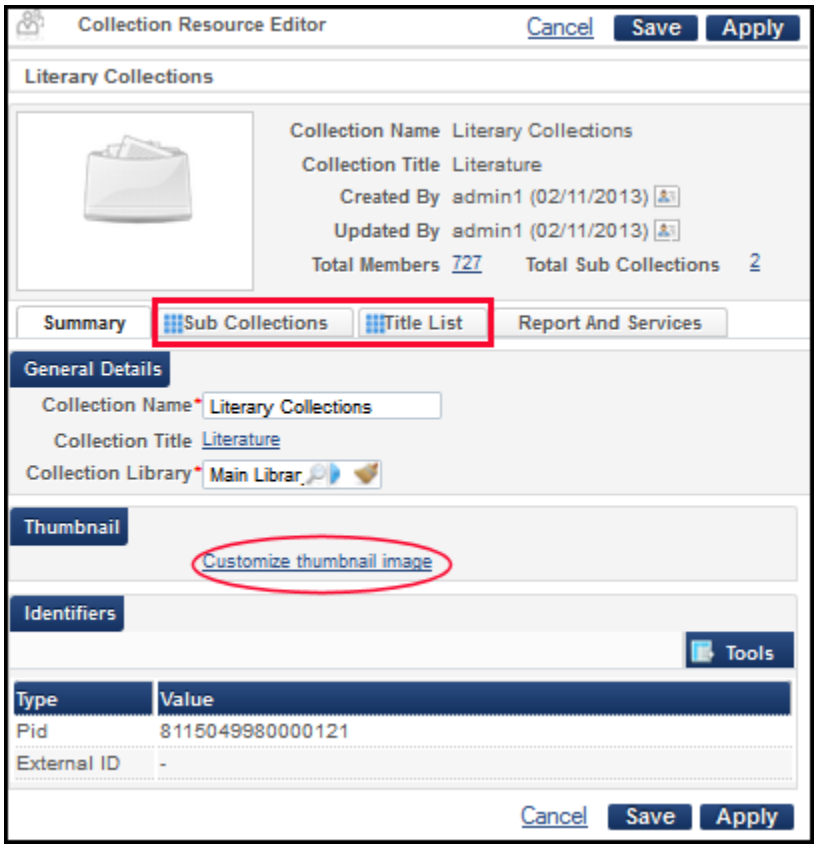


Figure 50 – Collection Resource Editor, Summary Tab

(To add a thumbnail for the parent collection, click the **Customize thumbnail image** link and follow the browse and selection prompts.)

The blue squares to the left of the tab labels indicate that information has been added to that tab.

2 Click the **Sub-collections** tab to begin entering information for a new collection under this parent.

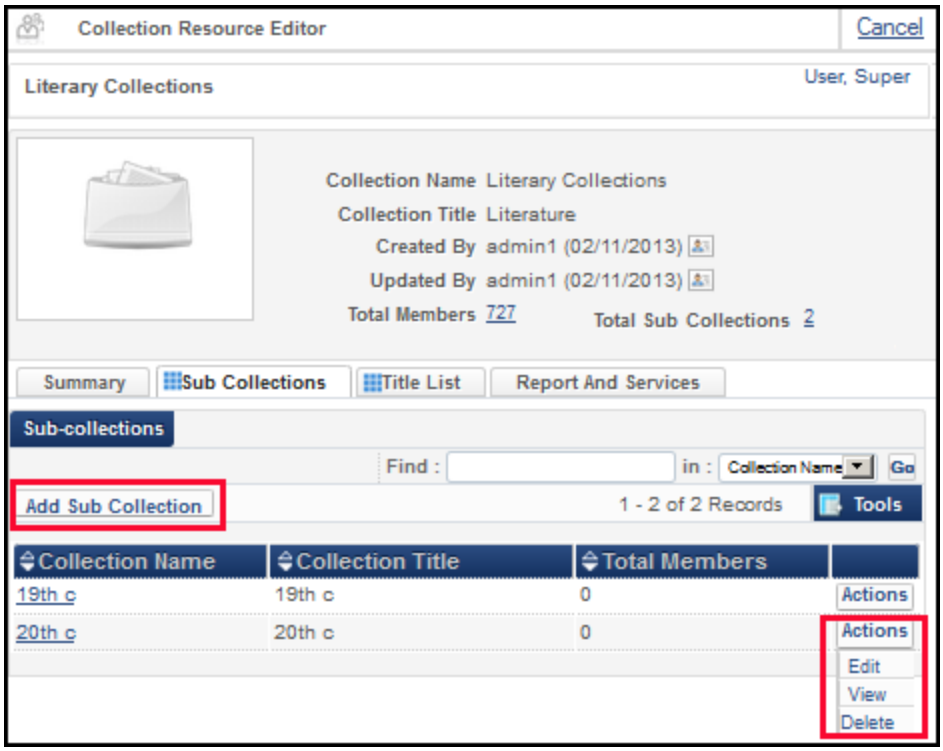


Figure 51 – Sub-collections Tab in the Collection Resource Editor

Any previous collections added to the parent collection are listed in the table in the Sub-collections section below the **Add Sub-collections** button. The row **Actions** drop-down options allow editing, viewing, and deleting.

3 Click the **Add Sub-collection** button. The Add New Collection page opens.

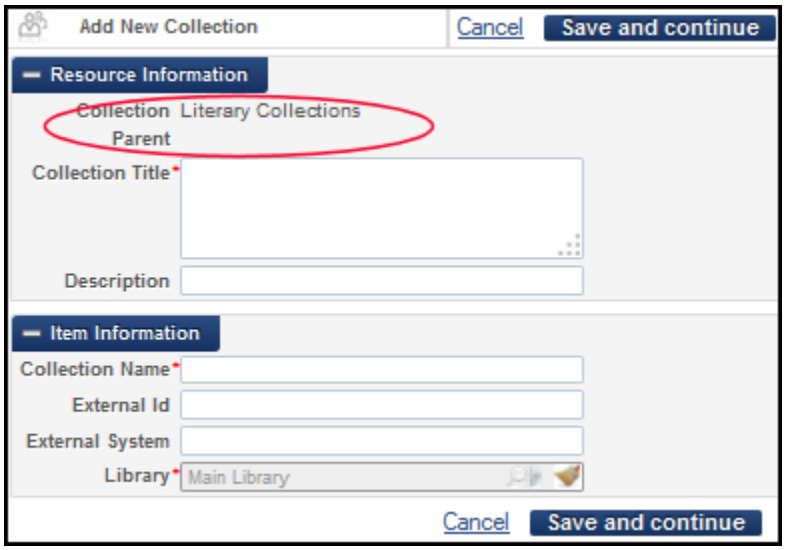


Figure 52 – Add Child Collection

Note: The Collection Parent at the top of the Resource Information section is the parent collection from the previous Collection Resource Editor page.

On the Add New Collection form, information entered in the Resource Information section goes to the bibliographic record. Item information applies to the item itself (object, source). This is used in the XML. (External ID and External System can be manually added or automatically added during an import of external material.)

4 Enter the required fields for adding a collection. See the Inventory section in the *Alma Resource Management Guide* for a discussion of top-level collections that includes a table that defines each field.

5 Click **Save and continue**. The Collection Resource Editor opens with your new collection added to the Sub-collections section.

6 To add titles to the collection, click the **Title List** tab. A Title List section opens. Any existing titles are listed in the table below the Add Titles buttons.

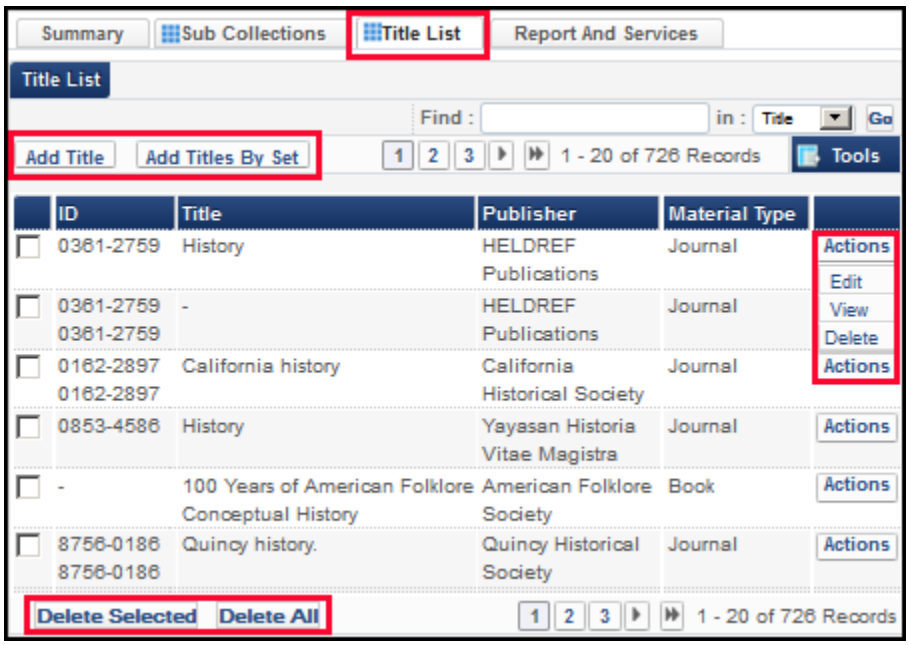


Figure 53 – Collection Title List Tab

7 To manually add single titles to the collection, click the **Add Title** button and select from the list that opens. To add titles by the set, click the **Add Titles by Set** button and make your selection from the sets listed.

You can also:

- Select check boxes for items to delete, then click **Delete Selected**
- Delete all items using the **Delete All** button
- Edit, view, or delete single items using the **Actions** drop-down menu for the particular item.

8 When you have completed your new collection or made the updates you want, return to the Summary tab and click one of the following:

- **Save** to save your work and return to the list of collections
- **Apply** to save your work and remain on the Collection Resource Editor for the parent collection.

Deleting Digital Items

Description

A new Withdraw job allows libraries to delete remote digital objects from their repositories. Prior to this release, Alma provided processes for withdrawing physical items, deleting portfolios, and deleting bibliographic records. With the November release, Alma has included a job (or process) called **Withdraw digital remote representations**. The job deletes digital objects without deleting their bibliographic records.

Technical Instructions

The following roles can delete remote digital objects using this process:

- Digital Inventory Operator
- Digital Inventory Operator Extended

To run the process for deleting remote digital objects:

1 On the Create Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Withdraw** from the **Filter** drop-down list. The withdraw jobs display in the list.

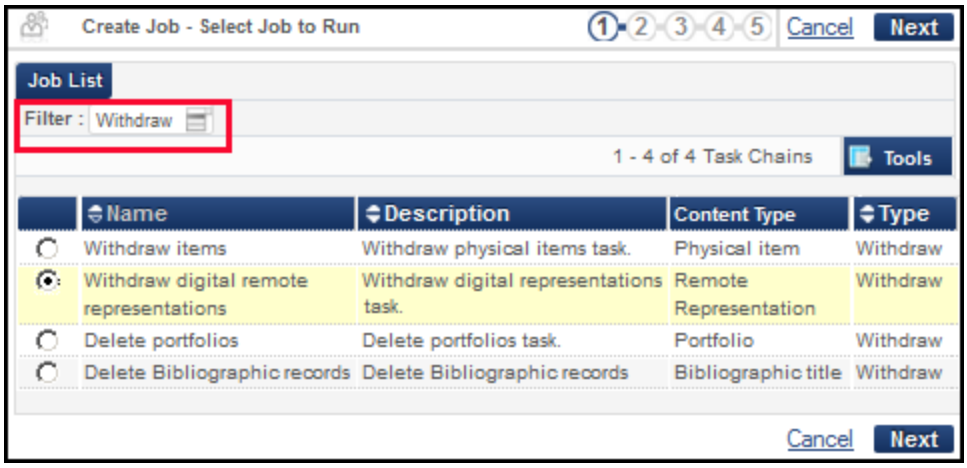


Figure 54 – Select Job from Withdraw Type

2 Select **Withdraw digital remote representations** and click **Next**.

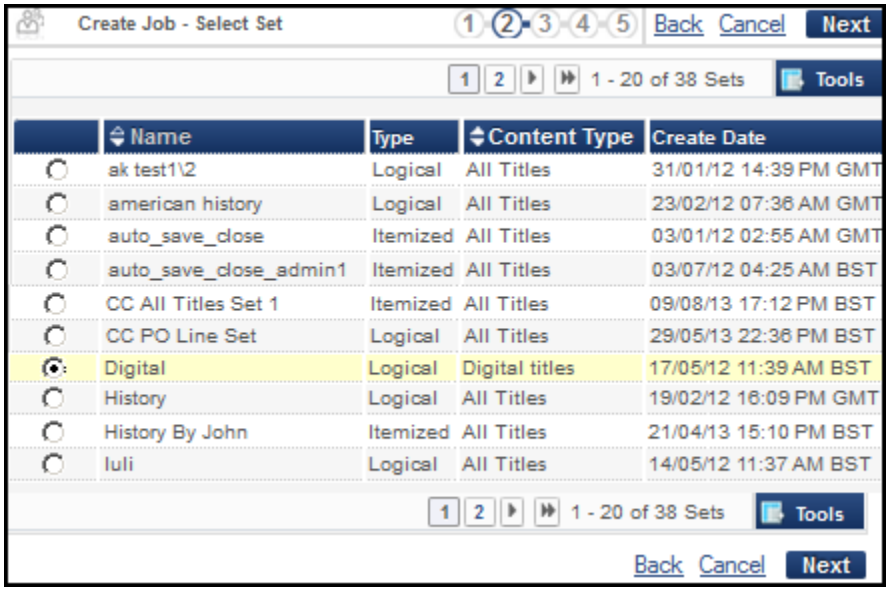


Figure 55 – Select Set on Which to Run Job

3 Select the set on which you want to run the deleting remote digital objects job and click **Next**.

Figure 56 – Task Parameters

4 For task parameters, choose how you want the system to handle bibliographic records and click **Next**.

5 On the Job Details and Schedule page, enter a name for the job and a schedule on which you want the job to run and click **Next**. The Review and Confirm page opens.

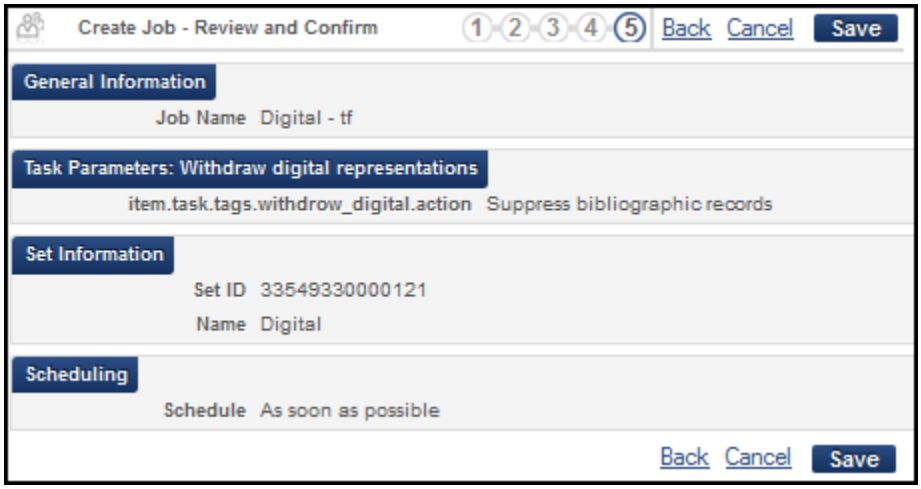


Figure 57 – Review and Confirm Job Terms

6 Review the information on the Review and Confirm page. If everything is correct, click **Save**. To go back and change something, use the **Back** button.

Additional Parsing Option for Label Printing

Description

The purpose of this enhancement is to provide an additional parsing option for label printing.

Technical Instructions

To access this option, one of the following roles is required:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To select a new parsing option:

1 On the Configuration Page (**Resource Management > Resource Configuration > Configuration Menu > General**), click **Call Number Parsing.**

2 View the drop-down list of options for the call number parsing type.

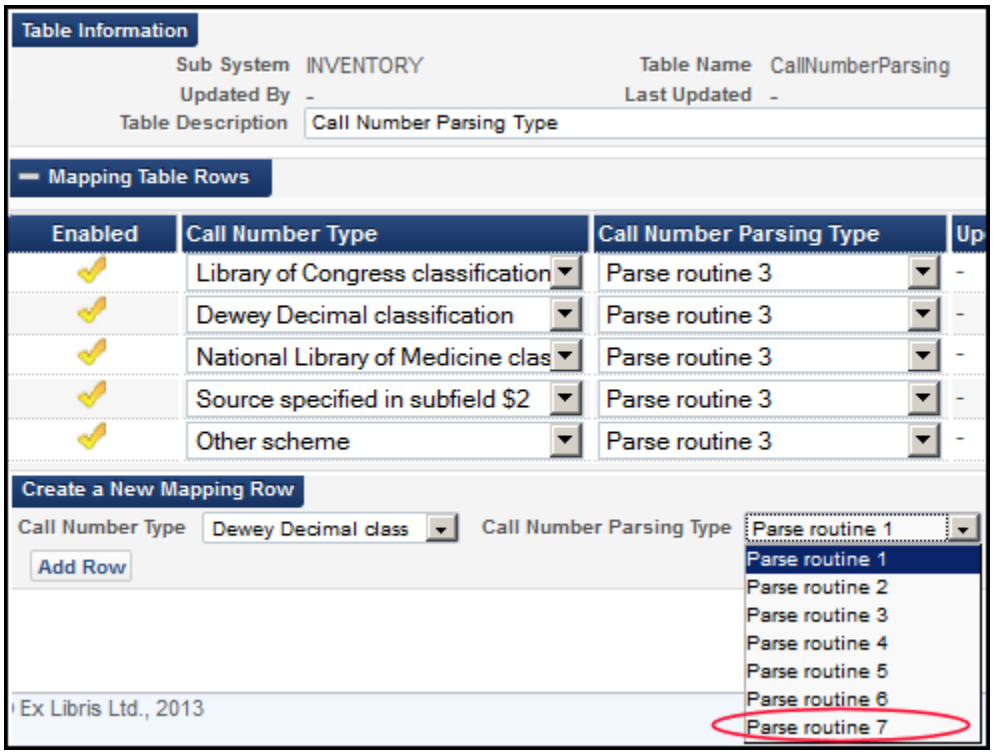


Figure 58 - New Parsing Routines

Parsing option 7 has been added for the November release. See Parse Routine 7 below for additional information.

3 Select a call number type and a call number parsing type from their respective drop-down lists and click **Add Row**.

4 Click **Customize**.

Parse Routine 7

The new call number parsing routine for the label-printing XML is based on the existing routine 6. It specifies additional parsing rules, as described and demonstrated in the Parse routine 7 row below.

Both routines use the following call number example:

```
HS RA44050B .5.T46.7.8.9.10.11.12.13.14.15 E47 2013
```

Parsing Option	Parsing Routine

Parse routine 6	Split by a space, classification, and limit length:
	
	This parsing routine splits by a space, classification, and limit length. In addition to splitting by a space and classification, it also evaluates when a line is longer than eight characters, splits on a period.
	
	`<call_no_1>HS</call_no_1>`
	`<call_no_2>RA44050B</call_no_2>`
	`<call_no_3>.5.T46.7.8.9.10.11.12.13.14.15</call_no_3>`
	`<call_no_4>E47</call_no_4>`
	`<call_no_5>2013</call_no_5>`

Parse routine 7	Split into the first 3 letters, then the rest; letters and numbers are split at the beginning of the call number, even if there is only one letter; a second period causes a split regardless of whether there is a character after it or of the length of the line (if not broken).
	
	`<call_no_1>HS</call_no_1>`
	`<call_no_2>RA</call_no_2>`
	`<call_no_3>44050B</call_no_3>`
	`<call_no_4>.5</call_no_4>`
	`<call_no_5>.T46.7.8.9.10.11.12.13.14.15</call_no_5>`
	`<call_no_6> E47</call_no_6>`
	`<call_no_7>2013</call_no_7>`

Other Resource Management Enhancements

- Parser support is now available on the portfolio level. With the November release, the UResolver uses the portfolio-level parser that is defined and visible on the **Linking Information** tab on the Electronic Portfolio Editor page. Previously, the UResolver used the parser specified at the service/collection level that may have had a different setting.
- GND authority records now display as expected in the Community Zone.
- You can save a merge rule in MD Editor only if the rule's syntax is valid.
- When updating a holdings record with a bibliographic record, the item field/subfield is now copied over properly, even if the call number type is 8 (Other).
- If you save a record that has related records, the link to the related records is maintained as expected.

Import Profiles

The following sections describe the functions provided for import profiles in the November 2013 release of Alma.

Note: For all the new features involving import profiles, one of the following roles is required: Repository Administrator, Catalog Administrator, General System Administrator, or Acquisitions Administrator

Multiple Item Creation

Description

The purpose of this enhancement is to enable the creation of multiple items in multiple libraries and locations using an import profile that defines how Alma should handle files that contain information on multiple items, libraries, and locations. Until now, it was possible to create multiple items (with the same call number) only in the same library and location.

You can create multiple items in multiple libraries and locations using either one of the following types of input files, with corresponding import profiles:

- Option 1 – All subfields are part of a single data field, such as 949, which includes library and location information, and well as item information, such as barcode and item policy.
- Option 2 – Library and location subfields are part of one data field, such as 949, and item subfields are part of another data field, such as 948.

Note: If library and location fields are mapped to more than one field (for example, the number of items is mapped to 950 and the location is mapped to 949), or item fields are mapped to more than one field (for example, the barcode is mapped to 949 and the item policy is mapped to 950), the import process cannot create multiple items.

Examples of Option 1

The following three examples delineate three different scenarios in which all library, location, and item subfields are part of a single data field.

The import profile is defined as follows for all three examples:

Figure 59 – Import Profile – All Data Subfields Mapped to the Same Field

Example 1: Each Data Field Tag Contains Data for a Single Item

The input file is as follows:

```
=949  $bBARCODE-1$pPOLICY-1
=949  \\$mTML$tUNASSIGNED$bBARCODE-2$pPOLICY-2
=949  \\$mMAIN$tMUSIC$bBARCODE-3$pPOLICY-3
```

In this case, three items are created, each receiving its corresponding barcode and policy. The first item is created for the default library and location.

	Barcode	Library	Location
	BARCODE-1	Main Library	Short Loans
	BARCODE-3	Main Library	Music
	BARCODE-2	TML	Unassigned location

Figure 60 – Items Created Upon Import – Example 1

Example 2: Locations and Related Items Are in the Same Data Field Tag

The input file is as follows:

```
=949  \\$mTML$tUNASSIGNED$bBARCODE-1$bBARCODE-2$bBARCODE-3$pPOLICY-1
=949  \\$bBARCODE-4$bBARCODE-5$bBARCODE-6$pPOLICY-2
=949  \\$bBARCODE-7$bBARCODE-8$pPOLICY-7
=949  \\$mONL$tONL ABC$o3$bBARCODE-9$bBARCODE-10
```

In this case, the following is created:

- Three items with barcodes 1, 2, 3, and policy 1 are created at the TML/Unassigned library/location.
- Three items with barcodes 4, 5, 6, and policy 2 are created at the default library and location.
- Two items with barcodes 7 and 8, and policy 7 are created at the default library and location.

- Three items are created at the ONL/ONL ABC library/location. Two items are created with barcodes 9 and 10, and one item is created with an automatically generated barcode.

Barcode	Library	Location
BARCODE-8	Main Library	Short Loans
BARCODE-7	Main Library	Short Loans
BARCODE-6	Main Library	Short Loans
BARCODE-5	Main Library	Short Loans
BARCODE-4	Main Library	Short Loans
6203	ONL	ONL ABC
BARCODE-10	ONL	ONL ABC
BARCODE-9	ONL	ONL ABC
BARCODE-3	TML	Unassigned location
BARCODE-2	TML	Unassigned location
BARCODE-1	TML	Unassigned location

Figure 61 – Items Created Upon Import – Example 2

Example 3: No Barcodes Are Stipulated

The input file is as follows:

```
=949  \\$mTML$tUNASSIGNED$o5
=949  \\$mONL$tONL ABC
=949  \\$o3
```

In this case, the following is created:

- Five items are created at the TML/Unassigned library/location.
- Four items are created at the ONL/ONL ABC library/location. (Since the number of items is not specified, the default number is used.)
- Three items are created at the default library and location.

Barcode	Library	Location
6312	Main Library	Short Loans
6311	Main Library	Short Loans
6310	Main Library	Short Loans
6309	ONL	ONL ABC
6308	ONL	ONL ABC
6307	ONL	ONL ABC
6306	ONL	ONL ABC
6305	TML	Unassigned location
6304	TML	Unassigned location
6303	TML	Unassigned location
6302	TML	Unassigned location
6301	TML	Unassigned location

Figure 62 – Items Created Upon Import – Example 3

Example of Option 2

The following example delineates a scenario in which library and location subfields are part of one data field, and item subfields are part of another data field.

The import profile is defined as follows:

Figure 63 – Import Profile – Library/Location and Item Subfields Mapped to Different Fields

Example

The input file could be as follows, with a list of libraries/locations followed by a list of barcodes:

```
=949  \\$mULINC$tMUSIC$o3
=949  \\$mONL$tONL ABC
=949  \\$mTML$tUNASSIGNED$o3
=948  $bBARCODE-1$pPOLICY-1
=948  $bBARCODE-2 =948  $bBARCODE-3 =948  $bBARCODE-4 =948  $bBARCODE-5
=948  $bBARCODE-6 =948  $bBARCODE-7 =948  $bBARCODE-8
```

Alternatively, the input file could be as follows, with a combined list of libraries/locations and barcodes:

```
=949  \\$mULINC$tMUSIC$o3
=948  $bBARCODE-1$pPOLICY-1 =948  $bBARCODE-2 =948  $bBARCODE-3
=949  \\$mONL$tONL ABC
```

```
=948  $bBARCODE-4 =948  $bBARCODE-5 =948  $bBARCODE-6 =948  $bBARCODE-7
=949  \\$mTML$tUNASSIGNED$o3
=948  $bBARCODE-8
```

After importing either one of the above input files, the following is created:

- Three items with barcodes 1, 2, 3 are created at the ULINC (Main Library)/Music library/location.
- Four items with barcodes 4, 5, 6, 7 are created at the ONL/ONL ABC library/location. (Since the number of items is not specified, the default number is used.)
- Three items are created at the TML/Unassigned library/location. One item is created with barcode 8, and two items are created with automatically generated barcodes.

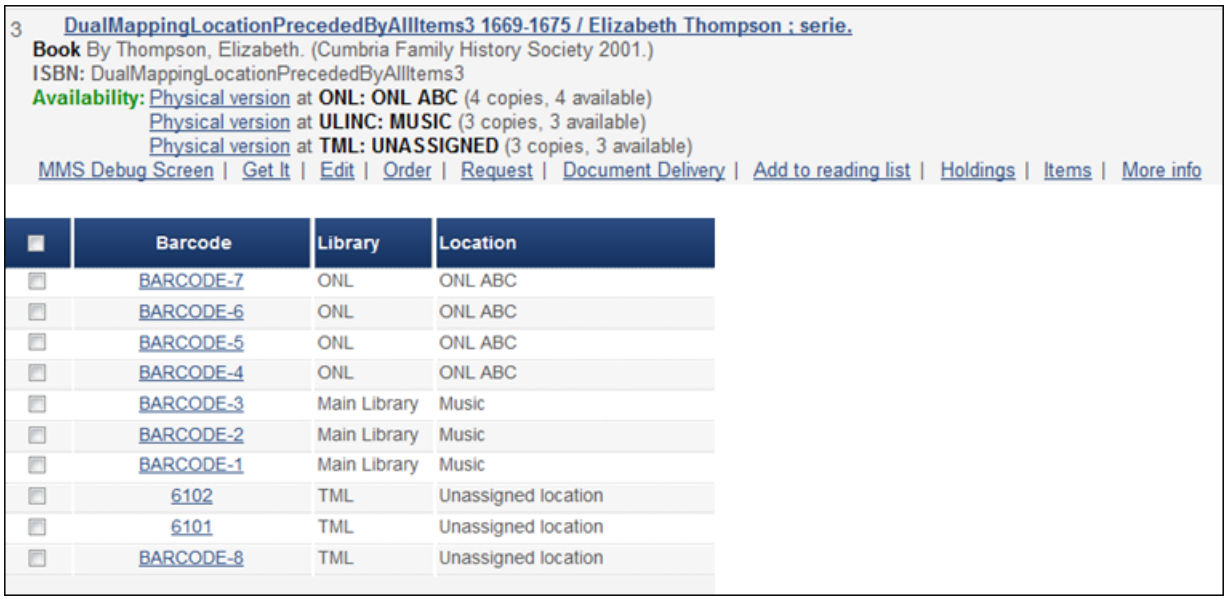


Figure 64 – Items Created Upon Import – Search Results and List

Support PO Line Reference Number as Match Point for Update Order

Description

The purpose of this enhancement is to enable the matching of PO lines based on the PO line number, in addition to the vendor reference number, when using the Update Order profile (the profile that is used for updating inventory associated with PO lines). If you receive a file from a vendor with updates to PO lines that were created in Alma, you can now use the PO line number to detect matching PO lines in Alma and update the inventory information related to these PO lines with the information received from the vendor.

Technical Instructions

The PO Line Information tab of the Update Order Import Profile Details page (step 7 of the wizard) now enables you to map both the PO line number and vendor reference number.

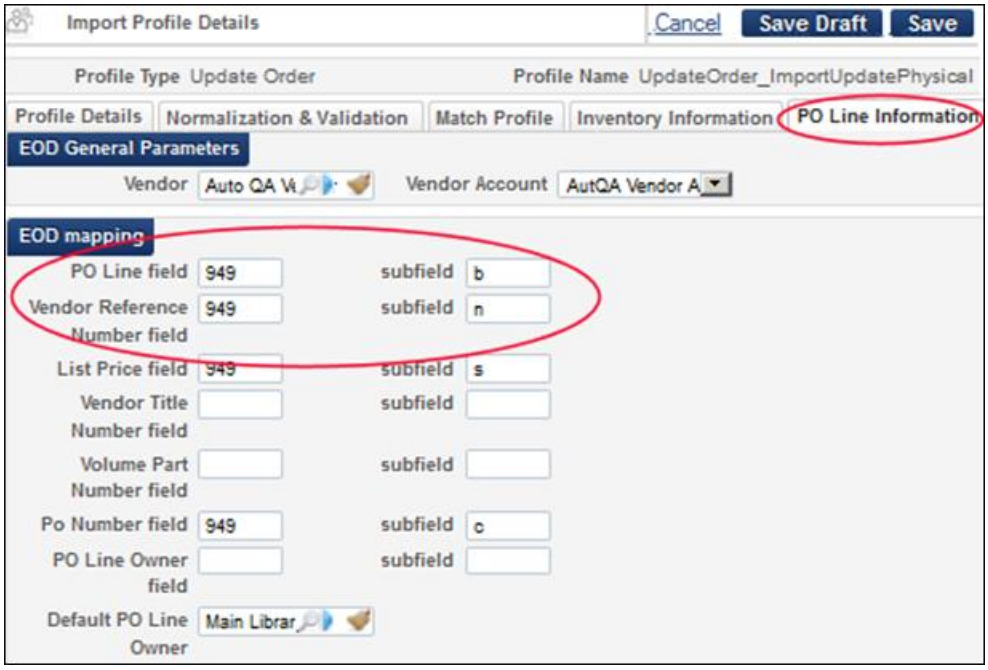


Figure 65 – PO Line Number and Vendor Reference Number Fields in the PO Line Information Tab

Support Deletion of Bibliographic Records and PDA Portfolios as Part of the Import Process

Description

The purpose of this enhancement is to support:

- Deletion of bibliographic records that have no associated inventory
- Deletion of portfolios that were created as part of a PDA (Patron-Drive Acquisitions) program

Bibliographic records are deleted in the following cases:

- The imported record includes a **d** in LDR position 5. For example:

```
<marc:record>
<marc:leader>00413dam a2200133z  4500</marc:leader>
<marc:controlfield tag="008">090929n        xx |         u||| ||und
u</marc:controlfield>
…
…
…
</marc:record>
```

- The import profile is configured to delete records (procedure described below).
- No inventory resources are associated with the bibliographic record. PDA portfolios are deleted in the following cases:
  - The imported record includes a **d** in the LDR position 5 (see the example above).
  - The PDA import profile is configured to delete records.
  - The portfolio that is associated with the bibliographic record has the same PDA ID as the PDA profile. (This will be visible in the Portfolio Resource Editor with the Alma December release.)

Technical Instructions

You can configure existing import profiles to delete records. Alternatively, you can configure this ability when defining a new import profile (step 4 of the wizard).

To configure an existing import profile to delete records:

1. On the Configuration Menu page (**Resource Management > Resource Configuration > Configuration Menu > Record Import**), click the **Import Profiles** link. The Run Import page opens.

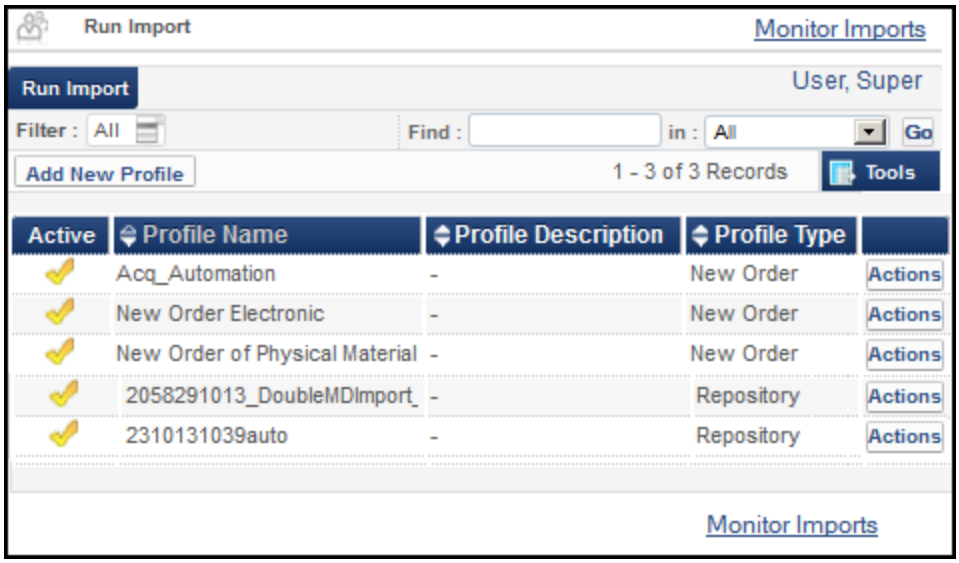


Figure 66 - Run Import Profile List

2 Locate the profile you want to use for importing and select **Actions > Edit**. The Import Profile Details page opens.

3 Click the **Match Profile** tab.

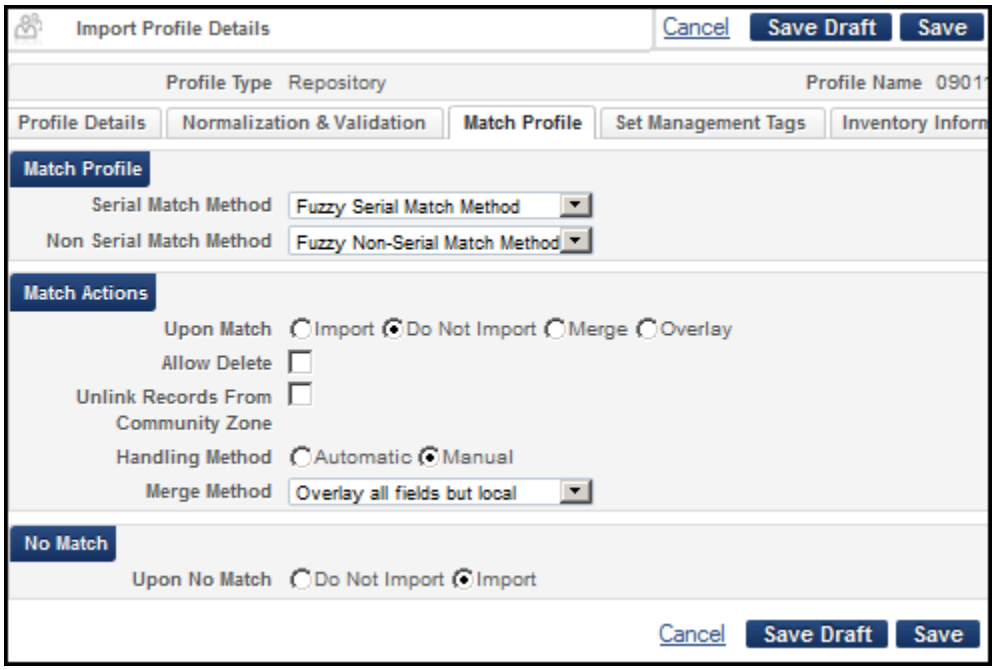


Figure 67 - Match Profile Tab on the Import Profile Details Page

4 In the **Match Actions** section, select the **Allow delete** check box.

5 Click **Save**.

Repository Import Profile Supporting Holdings Call Number Update

Description

The purpose of this enhancement is to enable the update of a holdings record with the call number that is part of an imported bibliographic record.

Note: This functionality is limited to holdings records that do not already have call numbers.

Technical Instructions

You can configure the use of a call number from an imported bibliographic record as the holdings call number in both existing and new Repository import profiles (step 6 of the wizard).

To configure this functionality in existing Repository import profiles:

1. On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu > Record Import**), click **Import Profiles**. The Run Import page opens to a list of import profiles.
2. Locate the Repository profile you want to use for importing and select **Actions > Edit**. The Import Profile Details page opens.
3. Click the **Inventory Information** tab.

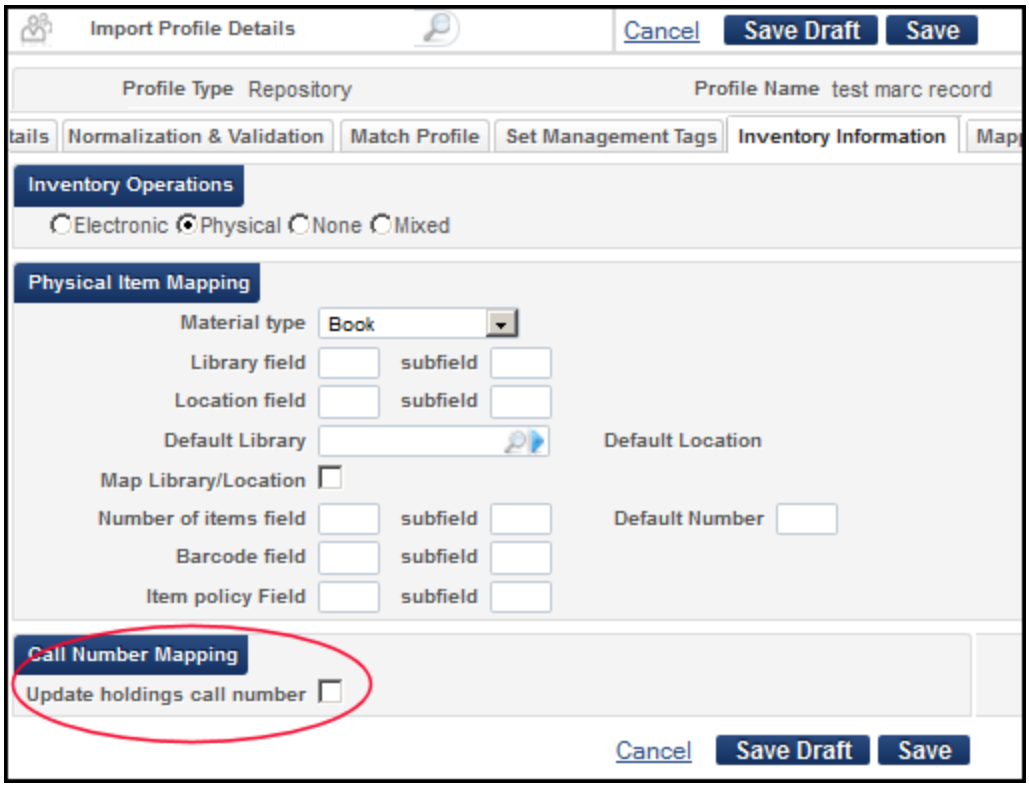


Figure 68 – Update Holdings Call Number

4 Select the **Update holdings call number** check box.

Note: Inventory Operations must be set to Physical or Mixed in order for call number mapping to be available.

On importing records for the repository, Alma will update the holdings records with call numbers from the bibliographic records.

Automatic Resolution of Multiple Matches

Description

The purpose of this enhancement is to facilitate the automatic resolution of multiple matches that are detected by Alma in order to minimize the number of multiple matches that require manual handling in the Matching section of the Resolve Import Issues page.

Note: This enhancement will be available with the first November hot fix on November 24th.

When the **Automatic** handling method is selected, two new options are available:

- **Disregard matches for CZ-linked records** – This option instructs Alma to disregard matches for CZ-linked records and process only matches on local records. This enables Alma to automatically resolve cases in which there is a multiple match because there is both a local and CZ record that match the incoming record. In such a case, only the local record will be considered a match.
- **Unresolved records**: **Skip and do not import** – This option instructs Alma not to import multiple matches. Instead of multiple matches being sent to the Matching section of the Resolve Import Issues page, they are added to a new report that has been created (**Download records that were skipped due to multi-match automatic handling**).

The following additional functionality is available as part of the import profile reports:

- Three new links include records that were skipped as a result of the above new options:
  - **Download records that were skipped due to multi-match automatic handling**
  - **Download records that were skipped because they are linked to the Community Zone**
  - **Download records that were skipped because they are locked by another user/process**
- The number of matches resolved automatically, as a result of **Disregard matches for CZ-linked records** having been selected, can be viewed under **Number of multi-matches resolved automatically**.

Technical Instructions

You can configure the automatic resolution of multiple matches as part of an existing import profile, or when defining a new import profile (step 4 of the wizard).

To configure the automatic resolution of multiple matches:

1. On the Configuration Menu page (**Resource Management > Resource Configuration > Configuration Menu > Record Import**), click the **Import Profiles** link. The Run Import page opens.

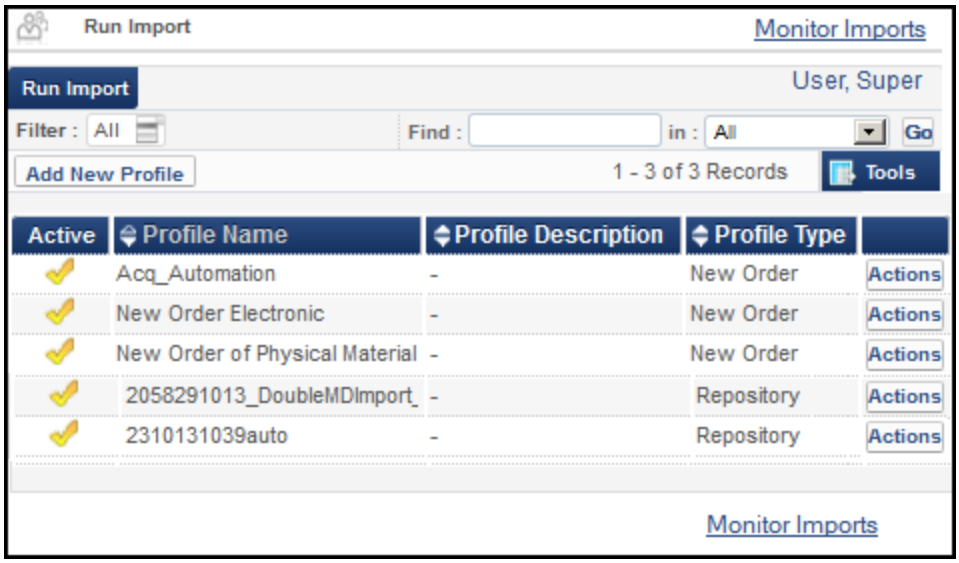


Figure 69 - Run Import Profile List

2 Locate the profile you want to use for importing and select **Actions > Edit**. The Import Profile Details page opens.

3 Click the **Match Profile** tab.

4 Under **Handling method**, select **Automatic**. The Automatic Multi-Match Handling section is displayed.

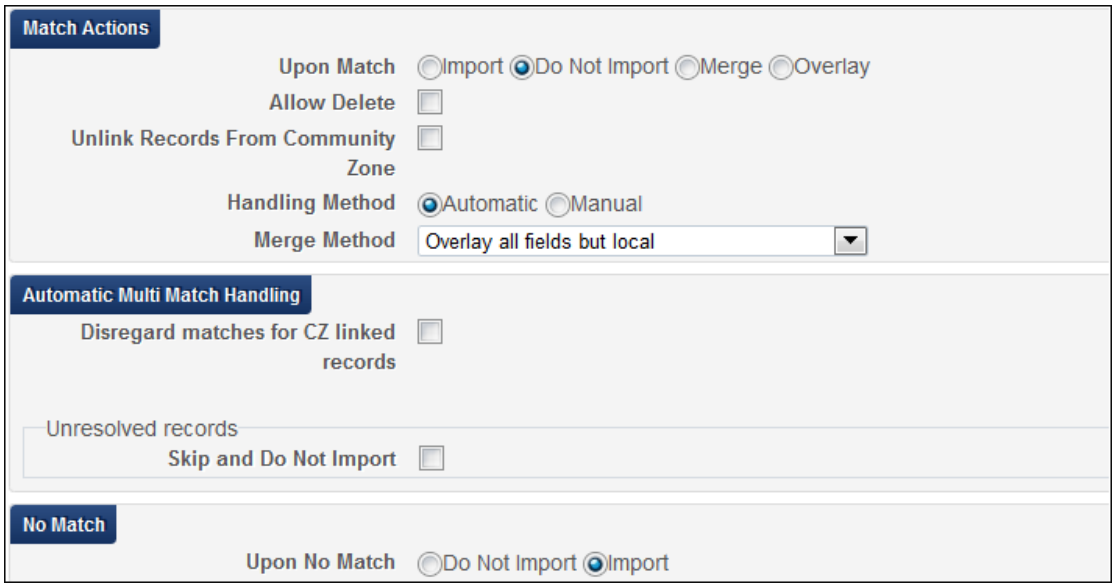


Figure 70 – Automatic Multi-Match Handling

5 Select the **Disregard matches for CZ- linked records** and/or **Unresolved records: Skip and do not import** check boxes.

6 Click **Save**.

Other Import Profiles Enhancements

- A new import profile match method, called **Unique OCLC Identifier Match Method**, will be available as of the first November hot fix on November 24th. (The functionality behind the method will be available at the beginning of December.) This method attempts to locate matching records based on any one of the following prefixes in the 035 field, subfields a or z, regardless of any zero-padded data: **(OCoLC)**, **ocm**, **ocn**, or **on**. (In other words, all of these prefixes are considered to be the same for matching purposes.)
- The **OCLC Match Method** will be renamed **035 (Other System Identifier)** in the first November hot fix.
- The import profile **Number of items** and **Barcode** fields now function as expected.

Fulfillment

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

Demerits – Virtual Block Assignment

Description

The purpose of this enhancement is to enable customers to configure a demerit system that allows them to apply patron blocks (such as for loans) based on the number of demerits a user has accrued within a configured amount of time. Once a block is applied, the institution suspends the user for the configured number of days and subtracts the used demerit points from the user's record. If the user receives more demerit points while on suspension, these points and the user's remaining points may contribute to another suspension once the previous suspension period ends.

Note: Accrued demerit points must occur within the configured number of days to receive a suspension.

The **Users – Remove Demerits Blocks** job runs daily to determine whether suspended users have fulfilled their suspension period and have not exceeded the configured demerit threshold while on suspension, and if so, the user's block is lifted.

Technical Instructions

The following roles can configure demerits:

- Fulfillment Administrator
- General System Administrator

To enable the demerit functionality:

1. On the User Management Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General**), click **Other Settings**. The Customer Parameters mapping table opens.

2 In the **Mapping Table Rows** section, customize the following fields:

- **demerit_enable** – Set this field to **true**.
- **demerit_history_days** – Specify the length of the demerit tracking period in days. If the user's demerit points exceed the value specified in the **demerit_maximum_threshold** parameter during the last number of days configured in this parameter, the system places a block on the user.
- **demerit_maximum_threshold** – Specify the maximum number of points allowed during the tracking period.
- **demerit_suspension_days** – Specify the length of a user's suspension period in days.

3 Click **Save**.

To configure demerit points:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configuration**), click **User Demerits**. The Demerit Points mapping table opens.

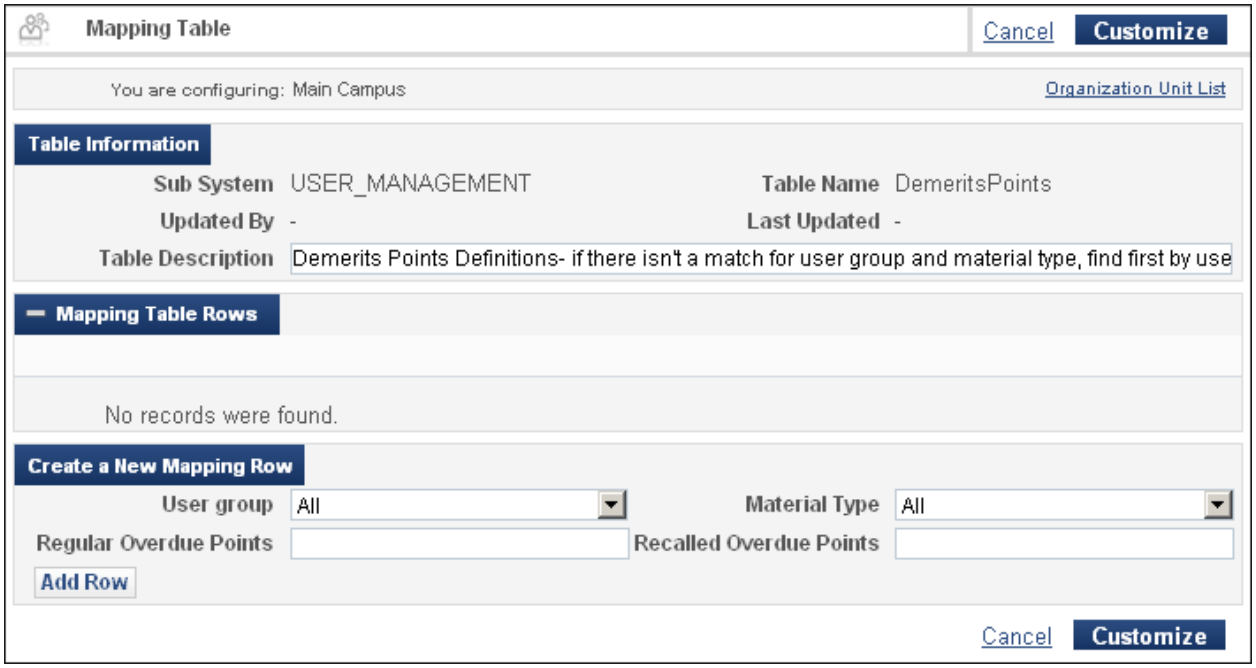


Figure 71 – Demerit Points Mapping Table

2 In the **Create a New Mapping Row** section, enter the following fields to define the points assigned to a user group and material type:

- **User group** – Select a specific user group or **All**.
- **Material type** – Select a specific material type or **All**.

- **Regular overdue points** – Enter the number of demerit points to apply to overdue items (not recalled overdue items).
- **Recalled overdue points** – Enter the number of demerit points to apply to recalled overdue items.

3 Click **Add Row**.

Alma uses the following priority to decide which mapping row to use when assigning demerit points to a user:

a Both the user's group and the material being returned match the values in the table.

b The user's group matches the value in the table and the **Material Type** is set to **All** in the table**.**

c The returned item matches the **Material Type** value in the table and **User Group** is set to **All** in the table.

d Both **User Group** and **Material Type** are set to **ALL** in the table.

e If no match is found, no demerits are assigned.

For example, if the following demerit rows are defined and an alumnus returns a manuscript late, the system assigns one demerit point to the alumnus:

User Group	Material Type	Regular Overdue Points	Recalled Overdue Points
Undergraduate	Book	3	5
All	Manuscript	3	6
Alumni	**All**	**1**	**2**

4 After you have added all of your demerit point definitions, click **Customize** to save your changes to the table.

If a user reaches the demerit threshold, the system applies a Demerit block on the patron record.

To configure demerit blocks:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configuration**), click **User Block Definitions**. The User Block Definitions mapping table opens.

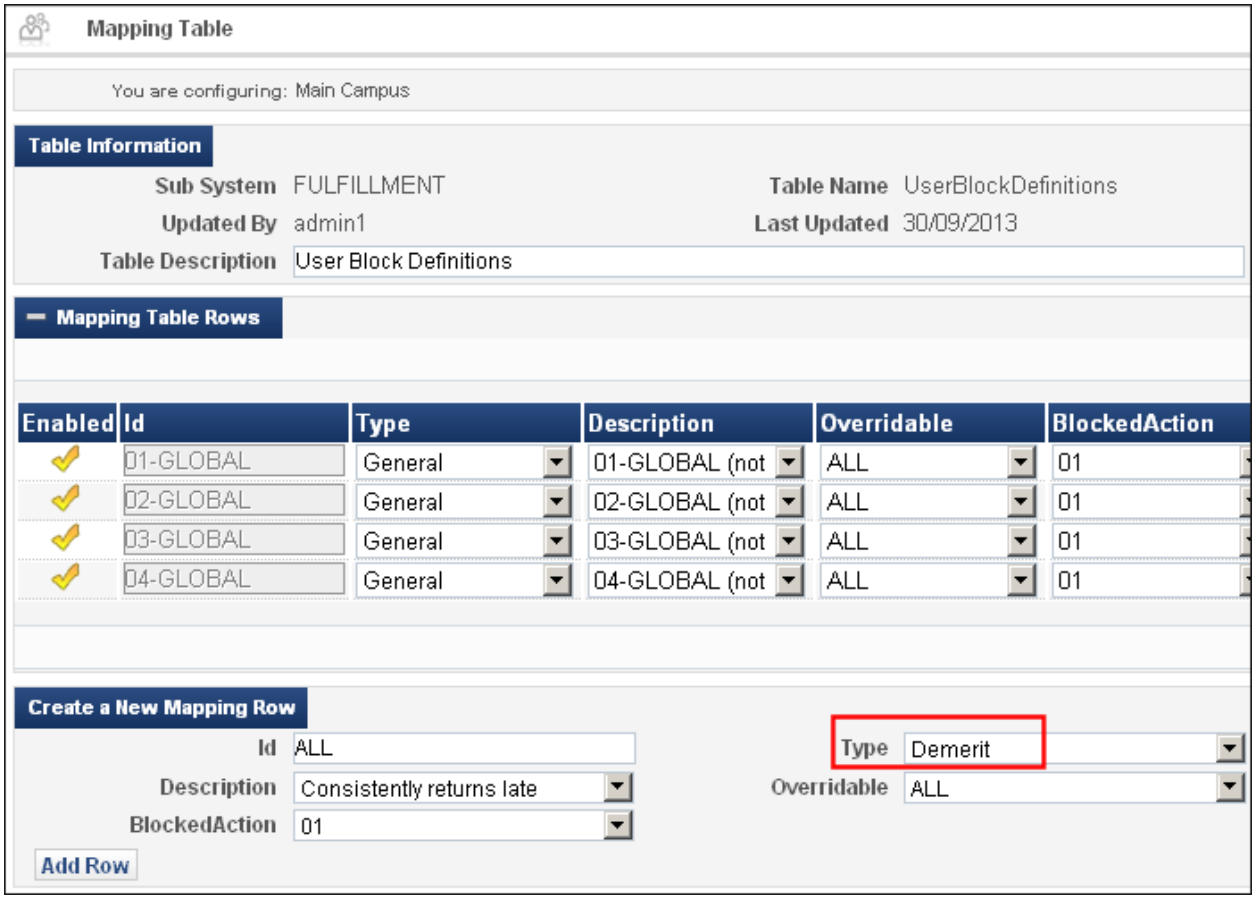


Figure 72 – User Block Definitions Mapping Table

2 In the **Create a New Mapping Row** section, create a block definition for demerits:

- **ID** – Specify an ID for the block definition. If demerit blocks are being migrated from your legacy system, use the ID from your legacy system in order to link with the migrated blocks.
- **Type** – Select **Demerit**.
- **Description** – Select the block description.
- **Overridable** – Specify who can override this block.
- **Blocked action** – Select the blocked action.

3 Click **Add Row**.

4 Click **Save**.

To monitor the demerit job:

1 On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Scheduled** tab.

2 Select **Fulfillment** in the **Filter** drop-down list to display the list of scheduled jobs.

3 In the row containing the **Users - Remove Demerits Blocks** job, click **Job History**.

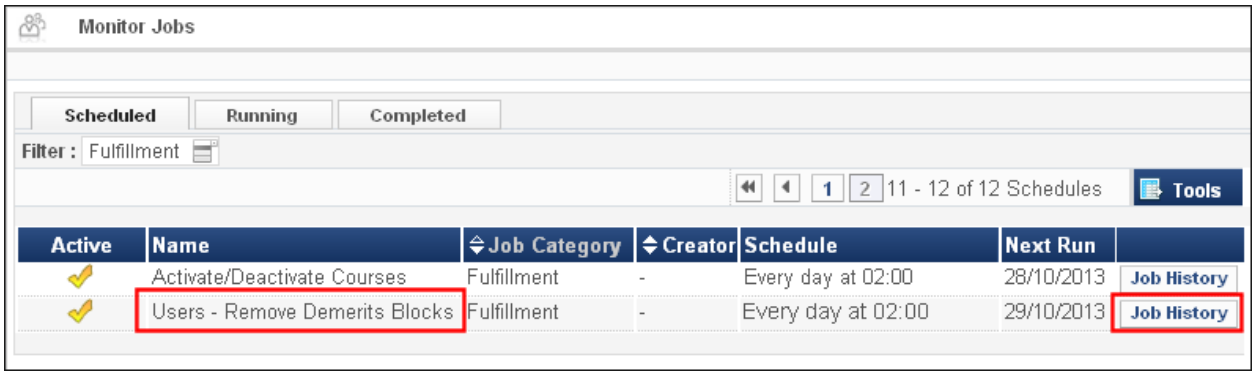


Figure 73 – Demerit Job on Monitor Jobs Page

Separate Privileges for the Return Workbench

Description

The purpose of this enhancement is to allow the configuration of limited circulation desk operators that can only return items and cannot access patron information. Please contact Ex Libris Support to configure this type of role if needed.

Pick Up Requested Resources Report

Description

The purpose of this enhancement is to allow staff users to create an Excel report that contains a detailed list of resources that need to be picked up. This report can be used instead of printing separate call slips for each request. It can be sent to a printer, emailed to a user, or displayed on the screen.

Technical Instructions

The Requests Operator role can generate full Pickup Request Reports.

To send a Pickup Request Report:

1 Click **Pick From Shelf** under **Fulfillment > Resource Requests**. The Pick Up Requested Resources page opens.

Figure 74 – Pick Up Requested Resources Page

2 Click **Request Report**. The following dialog box displays:

Figure 75 – Send/Download Dialog Box

3 Choose one of the following destination types in the **Type** field:

- **Printer** – The Excel report is sent to the printer destination selected from the **Printer** drop-down list.
- **User** – The Excel report is attached to the Request Report Letter that is sent to the email address of the user specified in the **User** field.

4 Click **Send**. If you prefer to view the Excel file on the screen, click **Download**.

To customize the Request Report Letter:

1 On the General Configuration page (**Administration > General Configuration > Configuration Menu > General Configuration**), click **Letter emails**. The Letters subsystem displays on the All Code Tables page.

Figure 76 – Letters Subsystem on All Code Tables Page

2. In the row containing the **Ful Pickup Request Report Letter** code table, select **Actions > Customize** to open the code table in edit mode.
3. Modify the fields as needed and click **Customize**.

Other Fulfillment Enhancements

- There is no longer a need to click **Send** twice when paying fines in Manage Patron Services.
- If an item belongs to a location that does not have terms of use (for example, the location does not belong to any fulfillment unit), the system determines the TOU based on the default TOU at the institution level. If no default TOU is defined at the institution level, the out-of-the-box, Ex Libris TOU – labeled **Generic** – is used.
- The **Preferred identifier** field, which indicates the preferred ID of the patron for whom the item is being held, was added to the expired hold shelf items task list.
- A time zone management error was corrected in the process of submitting booking requests from Primo.
- Duplicate requests by the same patron for the same title are no longer allowed. Note, however, that previously created duplicate requests have not been deleted from the system.
- A course code can now be up to 50 characters in length.
- Patron return history can now be viewed for more than 24 hours.

Resource Sharing

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

Request Form Enhancements

Description

The purpose of this enhancement is to provide additional fields on the ILL request page in Primo, and on the Resource Sharing Borrowing Request and Resource Sharing Lending Requests Task List pages in Alma. The fields are displayed when manually adding a request via these pages.

The new fields in the respective forms are highlighted in red in the figures below.

Technical Instructions

The following roles can access this facility:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view request form enhancments in Primo:

1 Click the **Citation Linker** link in Primo. The **Citation Linker** dialog box displays.

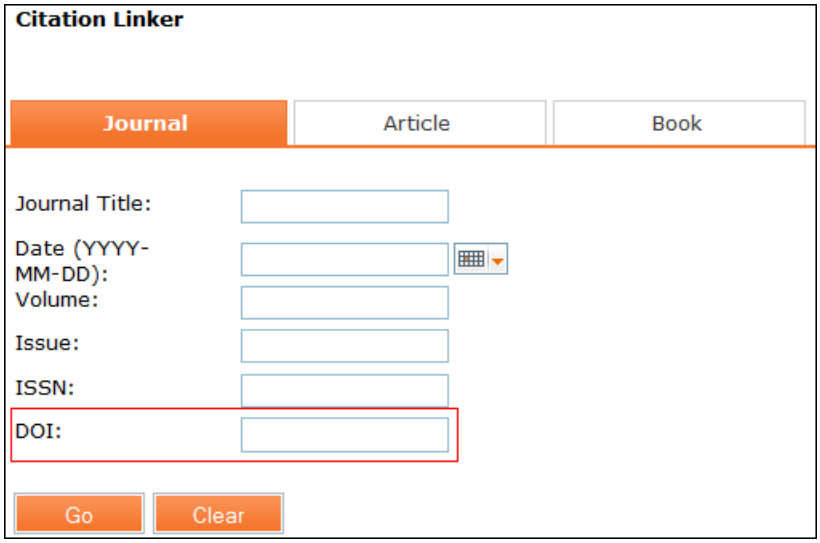


Figure 77 – Citation Linker Page — Journal Tab

2 Select the relevant tab (**Journal**, **Article**, or **Book**) and enter values in the relevant fields.

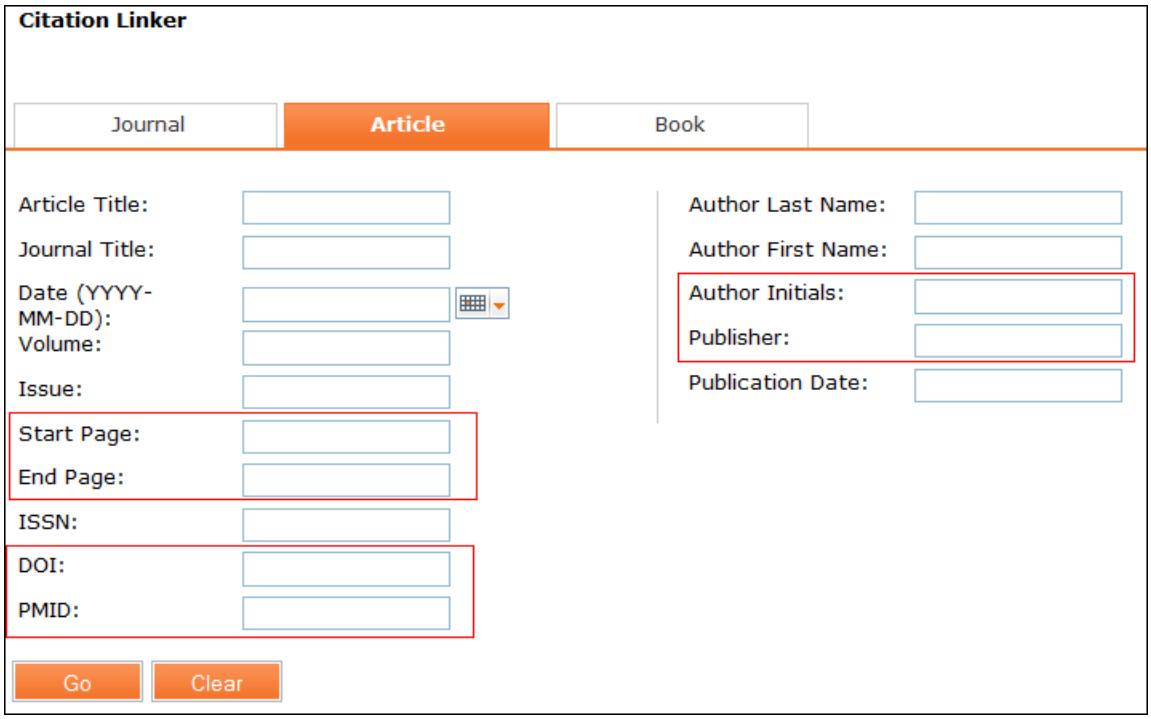


Figure 78 – Citation Linker Page — Article Tab

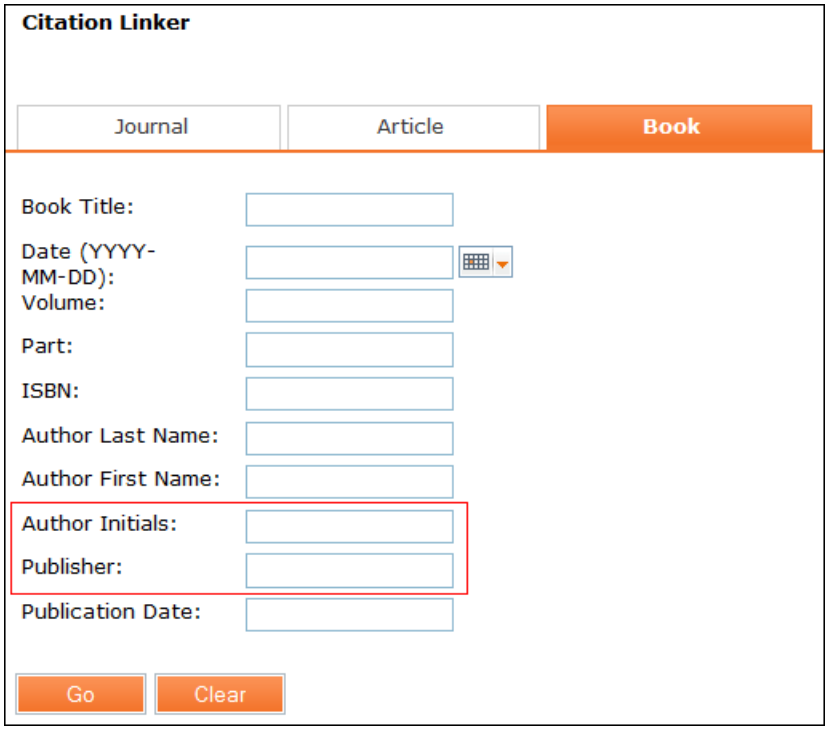


Figure 79 – Citation Linker Page — Book Tab

3 The following fields have been added in the indicated tabs, and also are displayed on the resource sharing request form:

Journal:

- **DOI**: The digital object identifier for the item

Article:

- **Start page**: The first page in the journal on which the article appears
- **End page**: The last page in the journal on which the article appears
- **DOI**: The digital object identifier for the item
- **PMID**: The PubMed Database ID
- **Publisher**: The publisher of the item
- **Author initials**: The initials of the author

Book:

- **Author initials**: The initials of the author
- **Publisher**: The publisher of the item

4 Click **Go**. The results display in the **Find it in Library** tab.

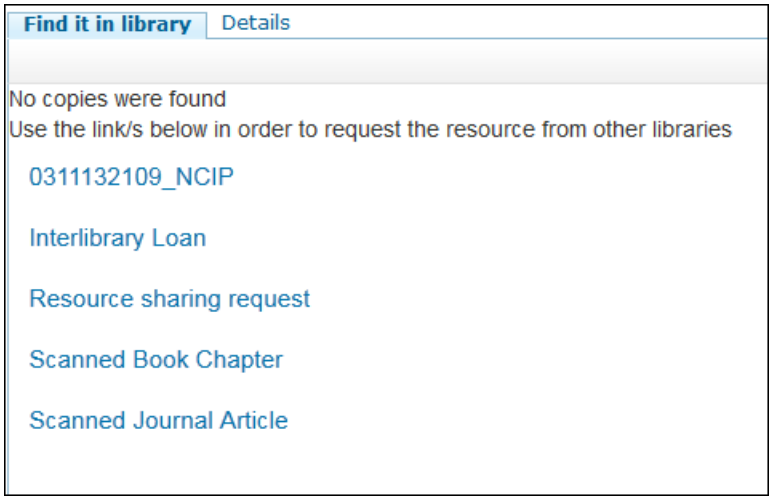


Figure 80 – Find it in Library Tab

If no items are found with the specified parameters, you can create a Resource Sharing request. Click the **Resource sharing request** link. The Resource Sharing Request form opens in the Find it in Library tab.

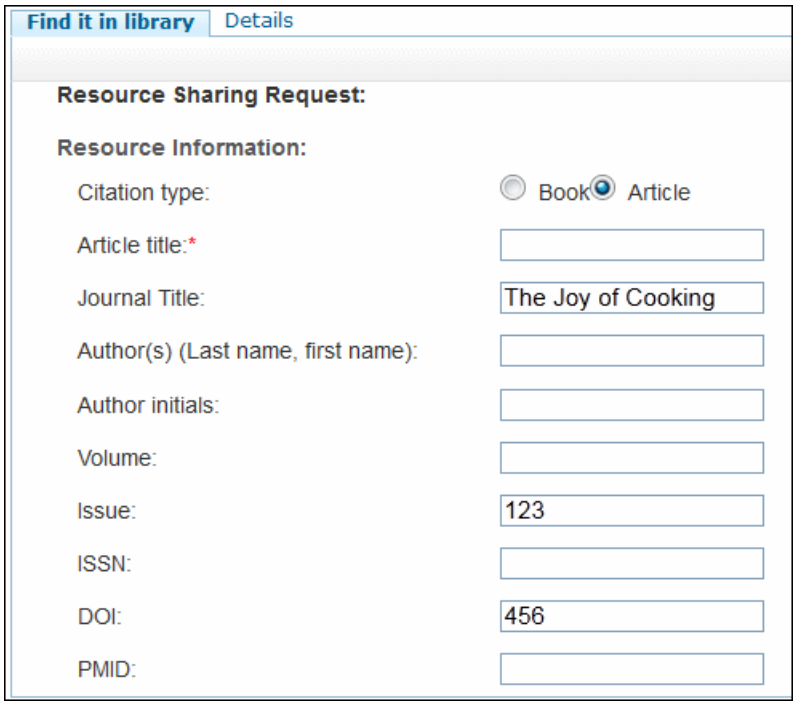


Figure 81 – Find it in Library Page — Resource Sharing Request Form

The field values that were entered in the Primo Citation Linker search are automatically populated on this page.

To view the request form enhancements in Alma:

1 From the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**) or the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Add > Manually**. Choose whether you want to add a **Book** or an **Article**. The relevant page displays for adding a Resource Sharing Borrowing or Resource Sharing Lending request. The new fields in the form are highlighted in red in the figures below.

Resource Sharing Borrowing Request

General Information | Parameters

Resource Information

Title *
Author
Author Initials
Edition
ISBN
Publisher
Publication Date
Place of Publication
Additional Person Name
Source
Series Title Number
Call Number
Note
Volume
Part
Chapter
Pages

Request Attribute

Requester *
Request Status: Created borrowing request
Format: Physical
Allow Other Format
Preferred Send Method: Email
Needed By
Pickup At *
Shipping Cost USD
Willing to Pay
Agree to Copyright terms *
Needs patron information
Request Note

Add Partners | AddRotas

Figure 82 – Resource Sharing Borrowing Request Page — Book

Resource Sharing Borrowing Request

Cancel | Save | Execute

General Information | Parameters

Resource Information

Article\Chapter Title *
Journal Title
Author
Volume
Author Initials
Issue
ISSN
DOI
PMID
Publisher
Place of Publication
Additional Person Name
Source
Series Title Number
Note
Chapter
Pages
Start Page
End Page
Year

Request Attribute

Requester *
Request Status: Created borrowing request
Format: Physical
Allow Other Format
Preferred Send Method: Email
Needed By
Pickup At *
Shipping Cost USD
Willing to Pay
Agree to Copyright terms *
Needs patron information
Request Note

Add Partners | AddRotas

Figure 83 – Resource Sharing Borrowing Request Page — Article

Resource Sharing Lending Request

General Information

Resource Information

Title *
Author
Author Initials
Edition
ISBN
Publisher
Publication Date
Place of Publication
Additional Person Name
Source
Series Title Number
Call Number
Note
Volume
Part
Chapter
Pages

Request Attribute

Supplied To * ABLYNX nv - Christina Verde
Request Status Created lending request
External Identifier *
Format Physical
Shipping Cost USD
Date Needed By
Request Note
Requester Email

Figure 84 – Resource Sharing Lending Request Page — Book

Resource Sharing Borrowing Request

General Information | Parameters

Resource Information

Article\Chapter Title *
Journal Title
Author
Volume
Author Initials
Issue
ISSN
DOI
PMID
Publisher
Place of Publication
Additional Person Name
Source
Series Title Number
Note
Chapter
Pages
Start Page
End Page
Year

Request Attribute

Requester *
Request Status: Created borrowing request
Format: Physical
Allow Other Format
Preferred Send Method: Email
Needed By
Pickup At *
Shipping Cost USD
Willing to Pay
Agree to Copyright terms *
Needs patron information
Request Note

Add Partners | Add Rotas

Figure 85 – Resource Sharing Lending Request Page — Article

2 The following fields have been added in the indicated sections:

Resource Information section:

- **Author initials**: The initials of the author
- **DOI**: The digital object identifier for the item

- **PMID**: The PubMed Database ID
- **Publisher**: The publisher of the item
- **Publication date**: The date of the book's publication
- **Source**: Source of the item
- **Series title number**: Title number of the series in which the item is located
- **Volume**: Volume number of the book
- **Part**: Part number of the book
- **Start page**: The first page in the journal on which the article appears
- **End page**: The last page in the journal on which the article appears

Request Attribute section:

- **Allow other format:** Select the check box to indicate that if the requested format is unavailable, the patron is willing to receive the item in another format
- **Preferred send method:** Select the preferred method of sending the item. Possible values are **Ariel**, **Email**, **Fax**, **FTP**, and **Odyssey**
- **Willing to pay:** Indicates that the patron has agreed to pay the invoice costs

3 You can enter information in the relevant fields on the page and click **Save**.

Rota Management

Description

The purpose of this enhancement is to enable managing the rota partners in a request. This includes adding and deleting rota partners. For partners with a status of **Pending**, you can also change the order of the parnters within in the rota.

Technical Instructions

The following roles can manage rotas:

- Fulfillment Services Operator
- Fulfillment Services Manager

To add partners to a rota:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Edit** for a request. The Resource Sharing Borrowing Request General Information tab opens.

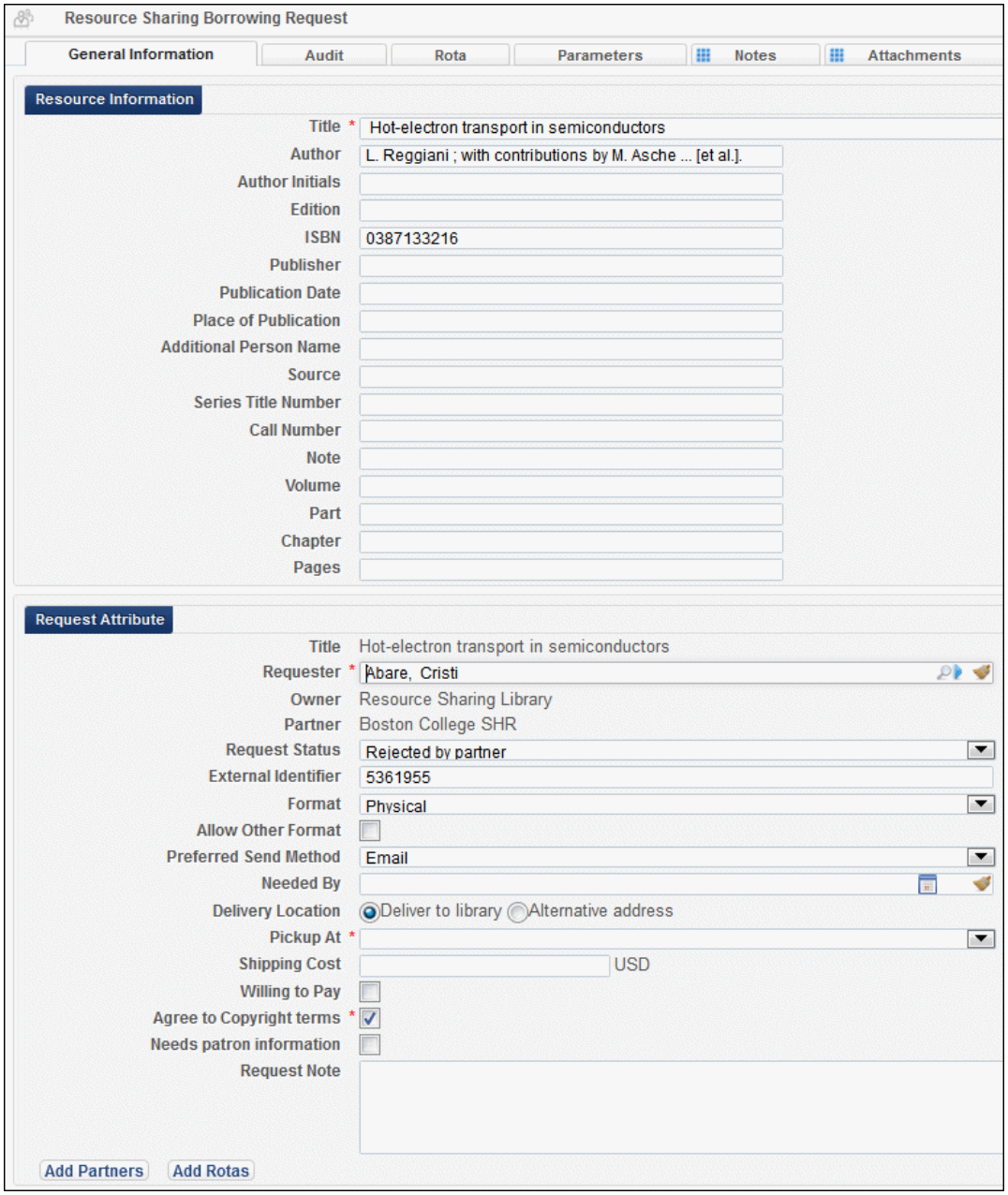


Figure 86 – Resource Sharing Borrowing Request Page – General Information Tab

2 Click the **Rota** tab. The Rota page displays, showing the list of partners in the current rota.

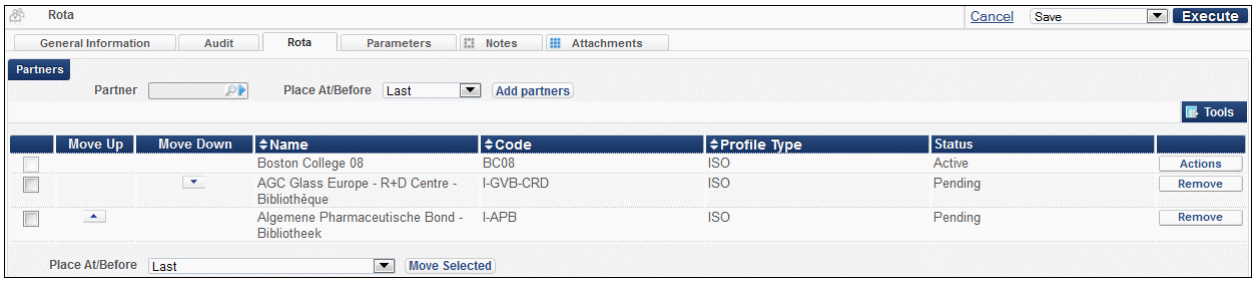


Figure 87 – Rota Tab

3 Click the Browse icon in the **Partner** field. The Resource Sharing Partner List page opens, displaying the list of available Resource Sharing Partners.

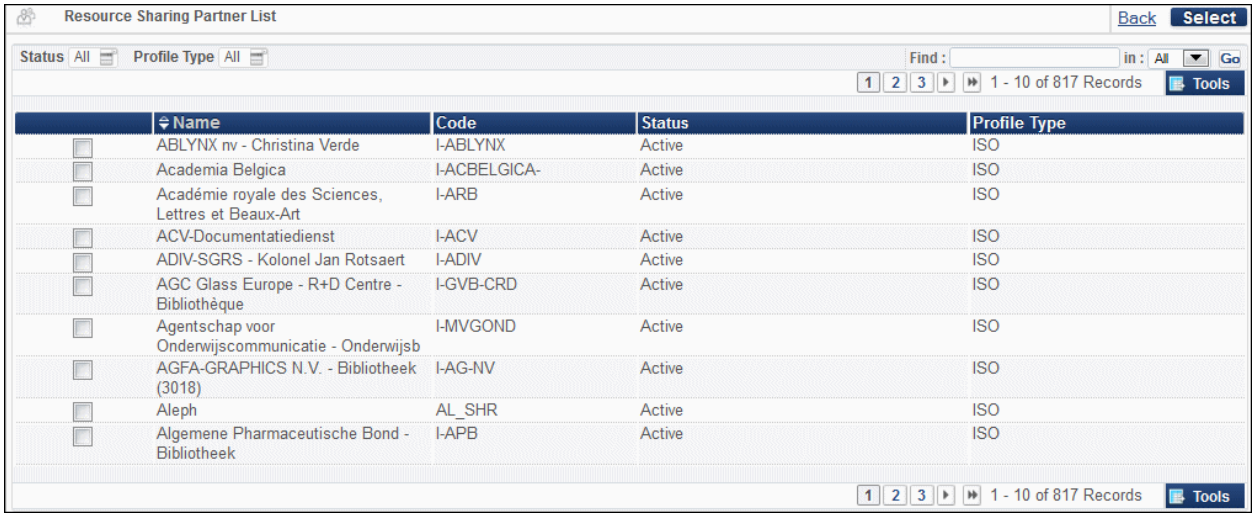


Figure 88 – Resource Sharing Partner List Page

4 Select the check box of the partners you want to add to the rota and click **Select**. The Rota page displays, with the partners listed in the **Partner** field.

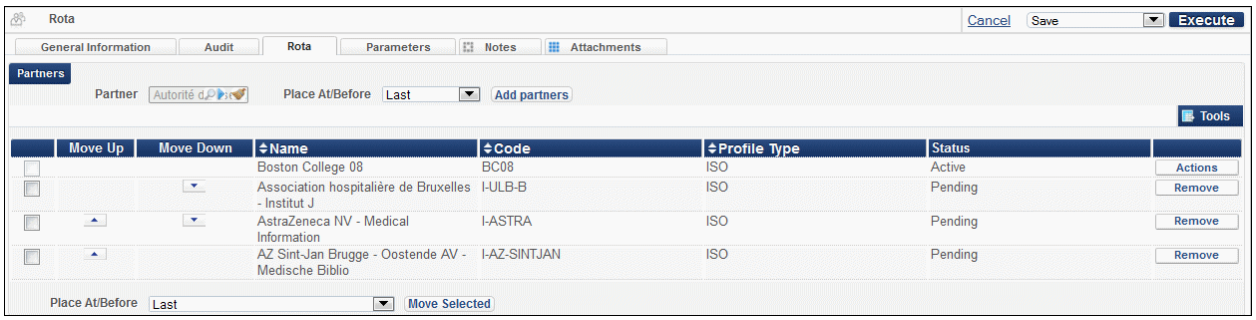


Figure 89 – Rota Page With Partners

5 In the **Place at/Before** drop down list, select the location for the partners to be placed in the partner list, and click **Add partners**. The selected partners display on the page.

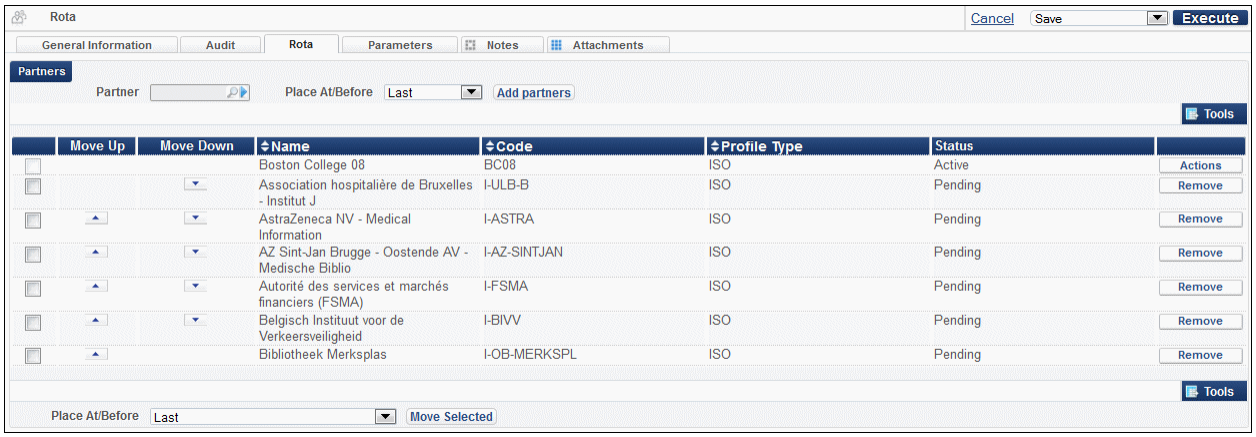


Figure 90 – Rota Page With Partners in Table

To modify the order of rota partners:

On the Rota page, do one of the following:

- Use the **Move Up** and **Move Down** arrows to set the order of the partners.
- Select the check boxes of the partners you want to move and in the **Place At/Before** field at the bottom of the page, select the location in which you want the partners to be placed and click **Move selected**.

To delete a rota partner:

On the Rota page, click **Remove** for the partner you want to remove.

Canceling Resource Sharing Borrowing Requests

Description

The purpose of this enhancement is to enable canceling resource sharing borrowing requests. Requests can be cancelled only if the request has not yet been shipped (such as with a status of **Created Borrowing Request** or **Ready to be Sent**). Cancellation messages are sent via the ISO protocol, if the partner is an ISO partner.

Patron requests can be cancelled in Primo by clicking the **Cancel** link in the **My Account** tab.

Canceling a request can be handled by fully canceling the request (via the Resource Sharing Borrowing Requests page), by canceling the request's active partner in the request's rota and removing the other partners in the rota, or by canceling only the currently active partner and activating the next partner in the rota (if one exists).

Technical Instructions

The following roles can cancel resource sharing borrowing requests:

- Fulfillment Services Operator
- Fulfillment Services Manager

To cancel a patron generated resource sharing borrowing request in Primo:

1 After logging into Primo, click the **My Account** link at the top right side of the page and click the **My Account** tab.

2 Select **Requests** from the list of facets on the left side of the page. The list of requests is displayed:

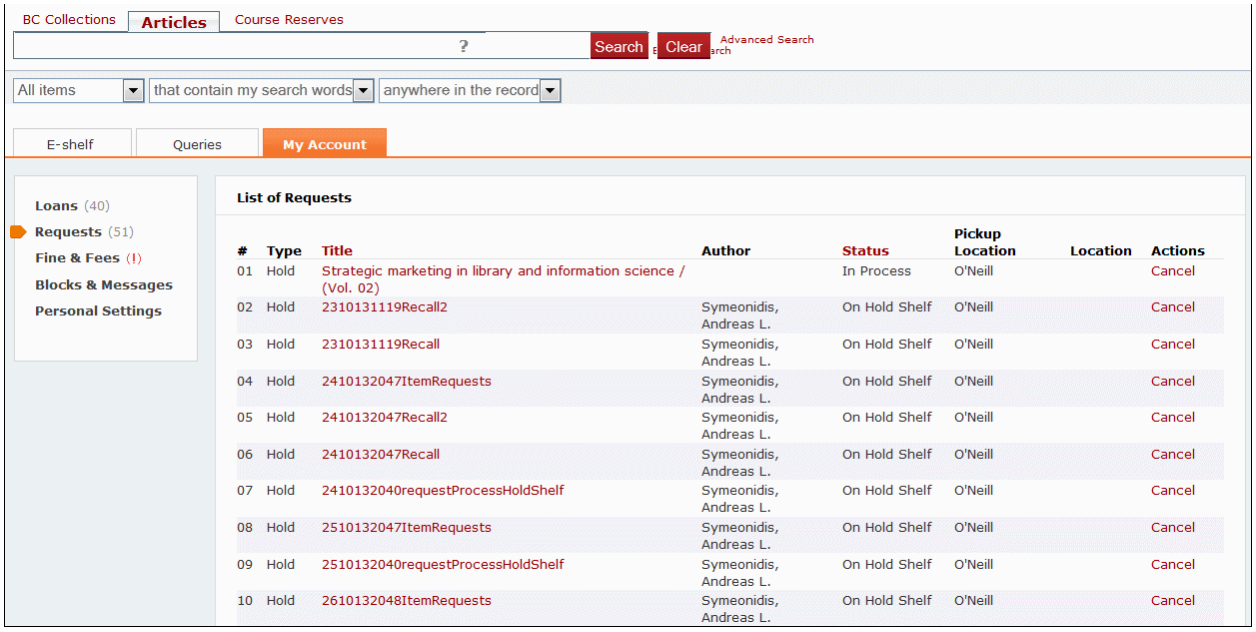


Figure 91 – List of Requests in Primo

3 Click **Cancel** for the relevant request.

To cancel a resource sharing borrowing request via the Resource Sharing Borrowing Requests page in Alma:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), filter the list of requests for entries that have not yet been shipped (such as with a status of **Created Borrowing Request** or **Ready to be Sent**).

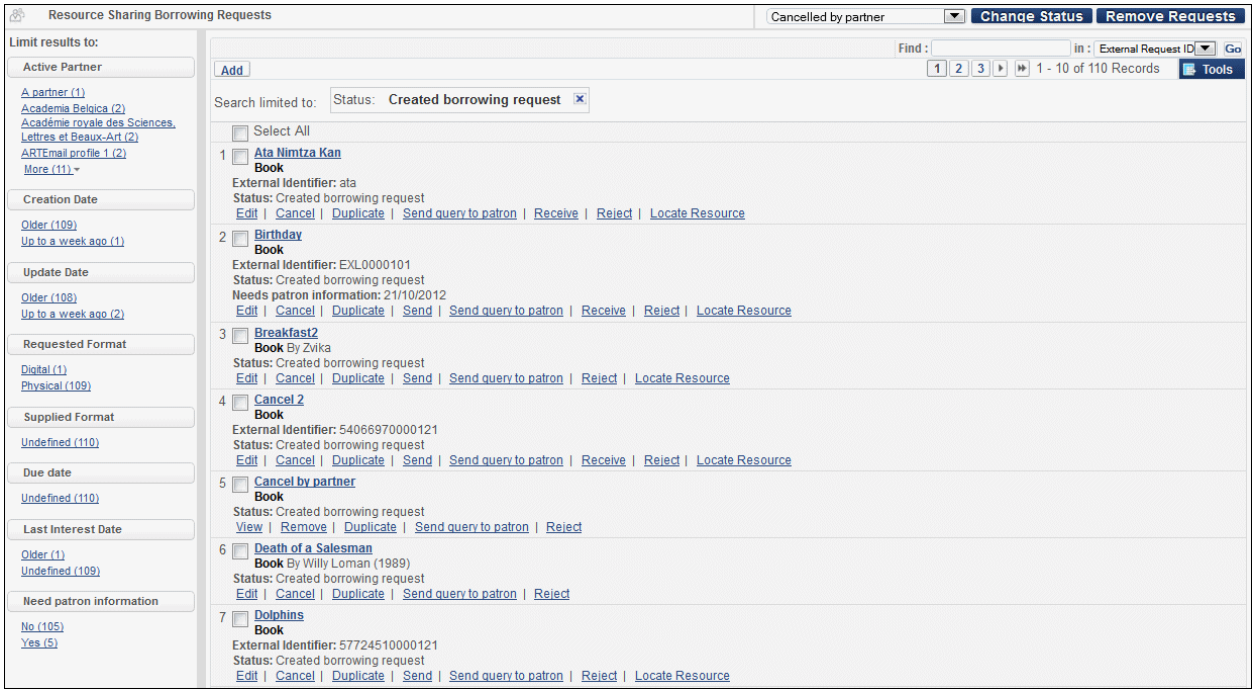


Figure 92 – Resource Sharing Borrowing Requests Page — Filtered Results

2 Click **Cancel** for a request.

You can also cancel a request by selecting the check boxes of the relevant requests and clicking **Remove Requests**.

To cancel multiple resource sharing borrowing requests via the Resource Sharing Borrowing Requests page:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), filter the list of requests for entries that have not yet been shipped (such as with a status of **Created Borrowing Request** or **Ready to be Sent**).

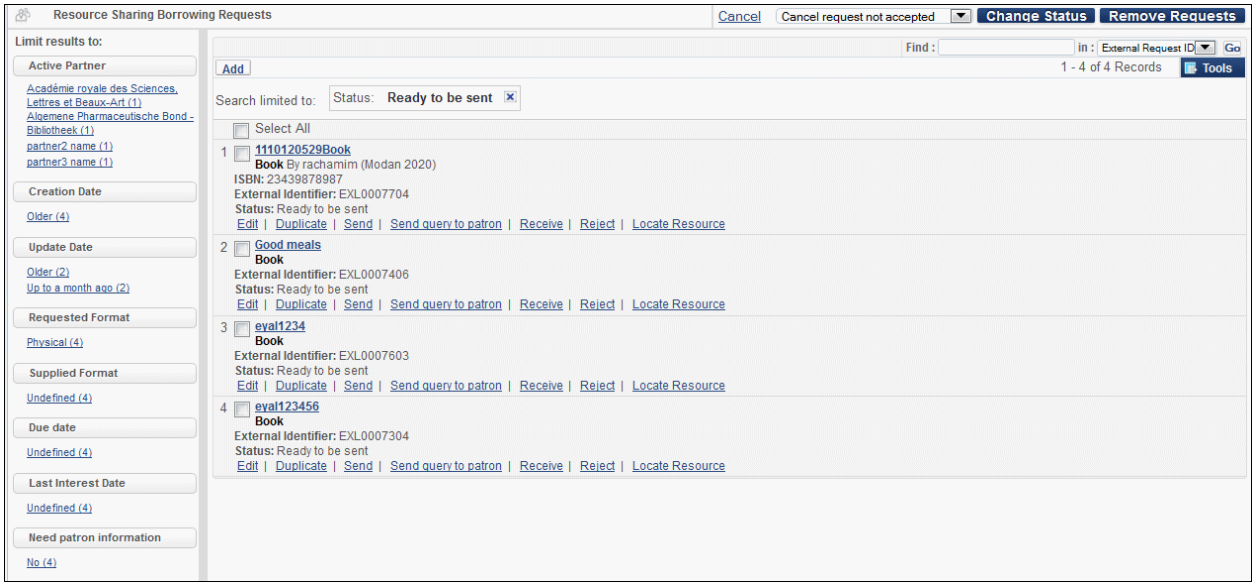


Figure 93 – Resource Sharing Borrowing Requests Page — Filtered Results

2 Select the check boxes of the requests to be cancelled.

3 Select **Cancel by staff** in the **Change Status** drop-down list, and click **Change Status**.

To cancel resource sharing borrowing requests via rota partners:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), filter the list of requests for entries that have not yet been shipped (such as with a status of **Created Borrowing Request** or **Ready to be Sent**).

2 Click **Edit** for a request. The requests' fields are displayed on the Resource Sharing Borrowing Request page.

Resource Sharing Borrowing Request

General Information | Audit | Rota | Parameters | Notes | Attachments

Resource Information

Title * Good meals
Author
Author Initials
Edition
ISBN
Publisher
Publication Date
Place of Publication
Additional Person Name
Source
Series Title Number
Call Number
Note
Volume
Part
Chapter
Pages

Request Attribute

Title Good meals
Requester * User, Super
Owner Resource Sharing Library
Partner Académie royale des Sciences, Lettres et Beaux-Art
Request Status Ready to be sent
External Identifier EXL0007406
Format Physical
Allow Other Format
Preferred Send Method Email
Needed By
Pickup At * Main Library
Shipping Cost USD
Willing to Pay
Agree to Copyright terms *
Needs patron information
Request Note

Add Partners | Add Rotas

Figure 94 – Resource Sharing Borrowing Request Details Fields

3 Click the **Rota** tab. The Rota page opens.

Rota | Cancel | Save | Execute

General Information | Audit | Rota | Parameters | Notes | Attachments

Partners

Partner | Place At/Before Last | Add partners

Tools

Move Up	Move Down	Name	Code	Profile Type	Status	
		partner1 iso name	partner1ISO	ISO	Active	Actions
		Aleph	AL_SHR	ISO	Pending	Remove
		Algemene Pharmaceutische Bond - Bibliotheek	I-APB	ISO	Pending	Remove

Place At/Before Last | Move Selected

Figure 95 – Rota Page

4 Select **Actions > Cancel** to cancel a partner. If no other partner is available to be the active partner, the request's status is marked as **Cancelled**.

Note: Canceling a partner is possible only if the active resource sharing partner has canceling enabled in their workflow profile.

You can also cancel the active partner or fully cancel the request by selecting **Cancel Active Partner Or Cancel Request** in the **Execute** drop-down list, and clicking **Execute**.

Viewing Resource Sharing Lending and Borrowing Request Actions

Description

The purpose of this enhancement is to enable viewing the actions taken on resource sharing lending and borrowing requests.

Technical Instructions

The following roles can view resource sharing lending and borrowing request actions:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view resource sharing lending and borrowing request actions:

1 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), or Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**) click **Edit** for a request. The Resource Sharing Lending Request or Resource Sharing Borrowing Request tab opens.

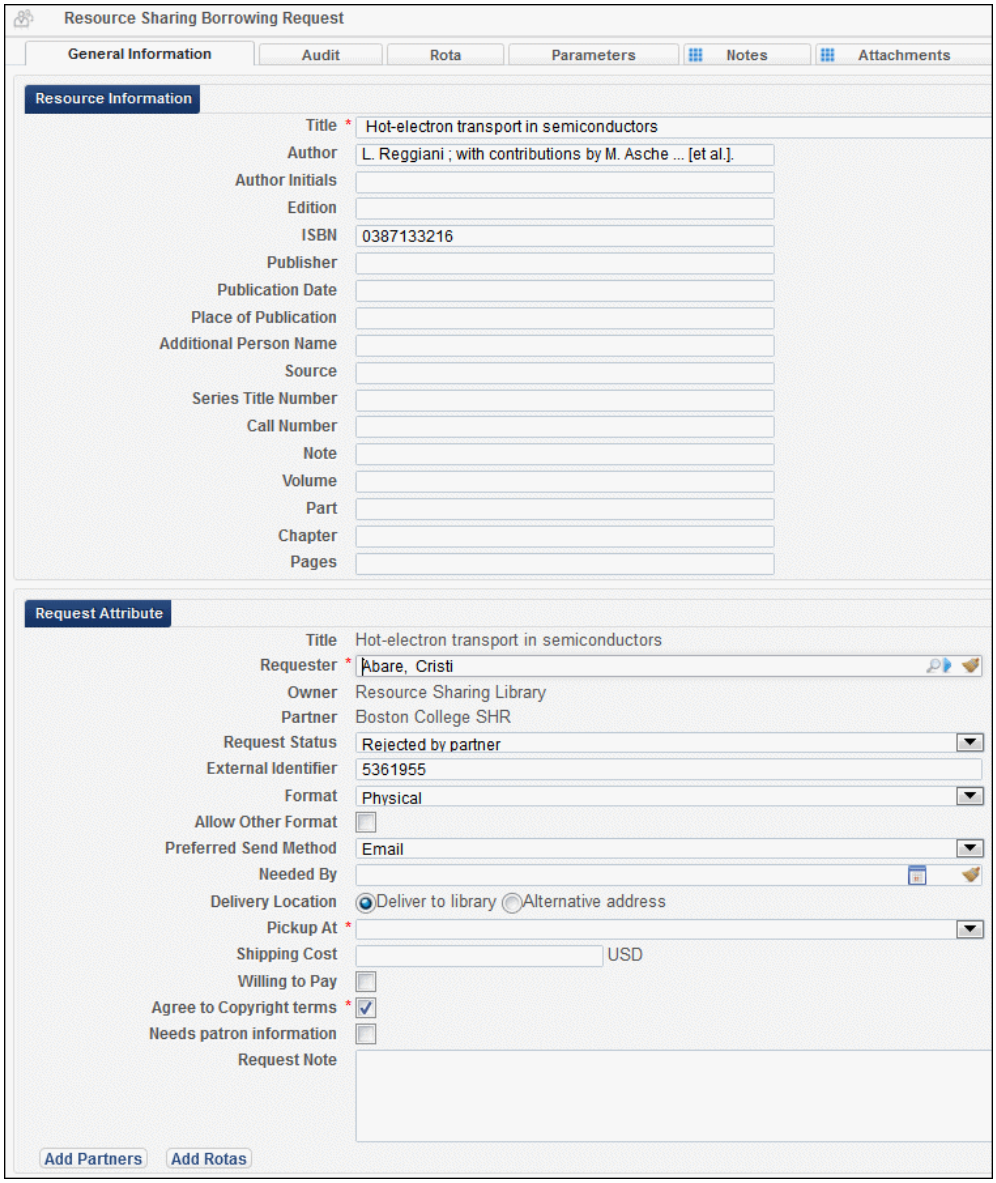


Figure 96 – Resource Sharing Request Page — General Information Tab

2 Click the **Audit** tab. The Audit page displays the list of actions performed on the resource sharing borrowing or resource sharing lending request.

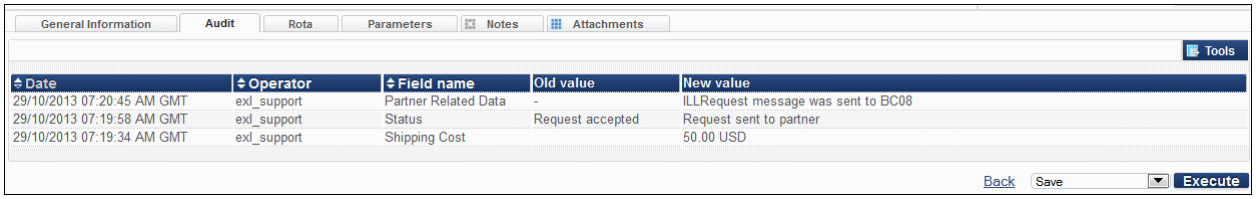


Figure 97 – Audit Page

Other Resource Sharing Enhancements

- There is a new **System type** drop-down list when defining a partner. This field is for Ex Libris' informational purposes and is mandatory.
- Alma supports receiving NCIP cancellation messages for Resource Sharing Lending Requests, provided the request has not already been shipped and that canceling has been enabled in the workflow profile. Once a request's status is changed to **Cancelled**, any existing move or digitization requests are also cancelled.
- In addition to the PI parameter and OpenURL, Alma now appends an RK parameter with the same value as the PI parameter to the URL it creates in order to link to Relais.

Collaborative Networks and Multi-Campus Institutions

The following section describes the functions provided for collaborative networks and multi-campus institutions in the November 2013 release of Alma.

Available For Enhanced to Group Settings for Consortia/Multi-Campus Institutions

Description

The purpose of this enhancement is to expand the Available For functionality with Group Settings for the consortial/multi-campus environments. With the November release, the **Available For** tab has been renamed **Group Settings** and includes new parameter settings for the Available For groups (refer to the Inventory Network Groups section in the *Alma Resource Management Guide* for more information). The purpose of the new parameters is to enable the setup of group propriety information, such as proxy, public name, linking parameters, and so forth.

The new parameters can be accessed with the **Add Settings for Group** button located in the **Group Settings** tab when editing electronic collections, services, and portfolios. The parameters provided include the following and vary according to the resource (collection, service, or portfolio):

- Public name
- Authentication note
- Public note
- Linking parameters
- Proxy enabled
- Proxy selected

Available For parameters that were previously available, such as date, embargo, and group definitions, continue to be provided in the Available For Information section of the **Add Settings for Group** dialog box (refer to the figures below).

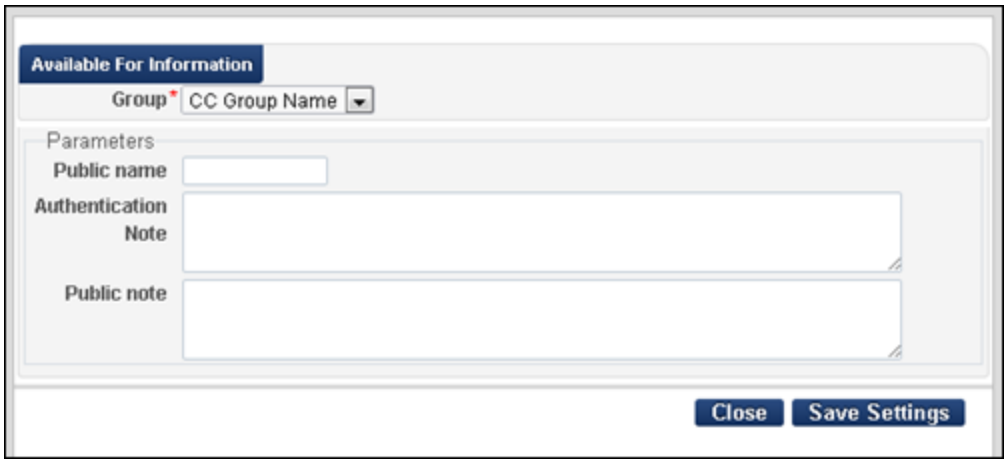


Figure 98 – Add Settings for Group - Electronic Collection

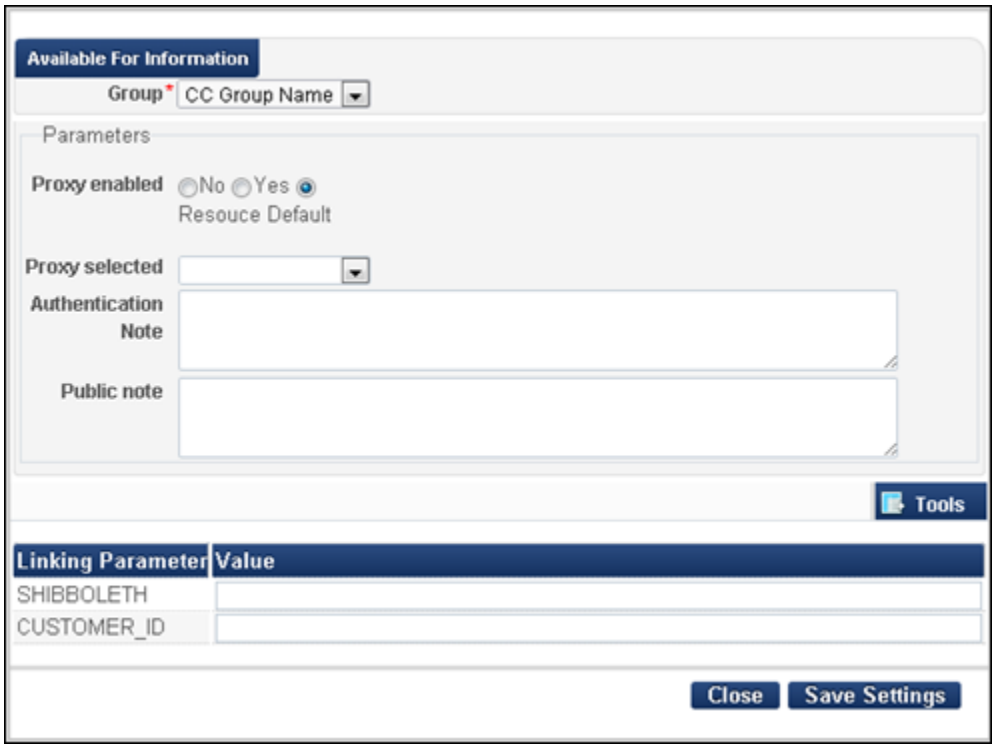


Figure 99 – Add Settings for Group – Electronic Services

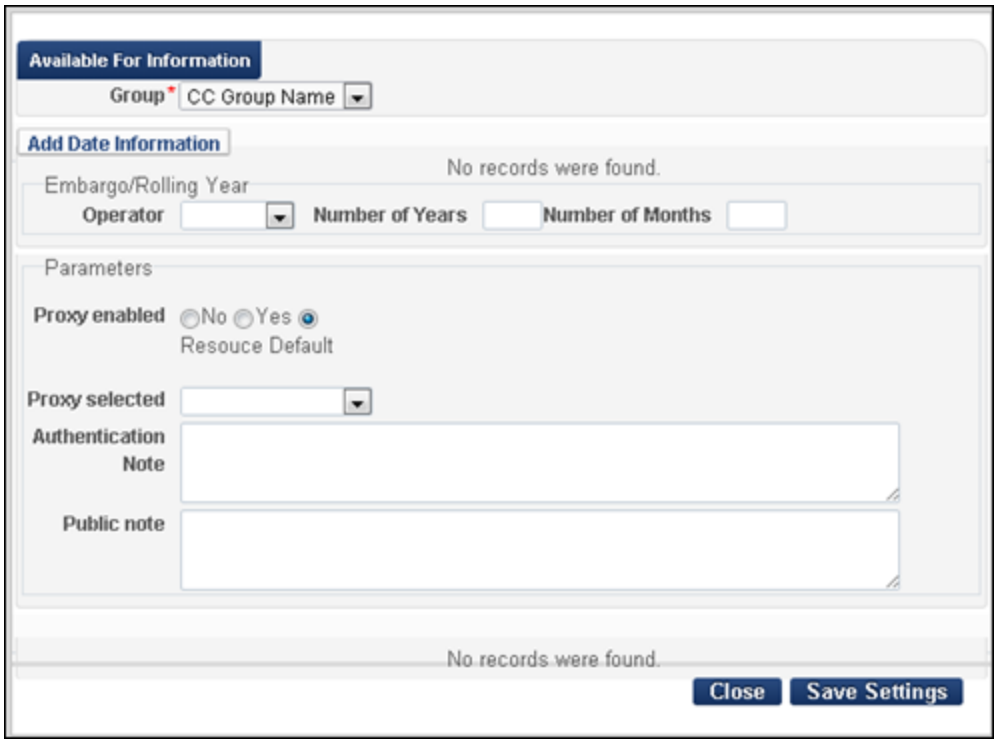


Figure 100 – Add Settings for Group - Electronic Portfolios

The Add Settings for Group parameters that you enter and save override the settings for the resource in the context of the Available For group that is specified.

The parameters that are defined as part of the group setting will be used by the Alma UResolver when calculating and resolving electronic services.

Staff can view the results of these parameter settings by using the **Test access** options that display results on the UResolver Screen.

Technical Instructions

The Electronic Inventory Operator role can access these new functions and parameter settings.

To configure the new group settings for Available For groups for electronic collections:

1. Complete a repository search for an electronic collection.
2. Click **Edit** (for a specific collection). The Electronic Collection Editor opens for that collection.

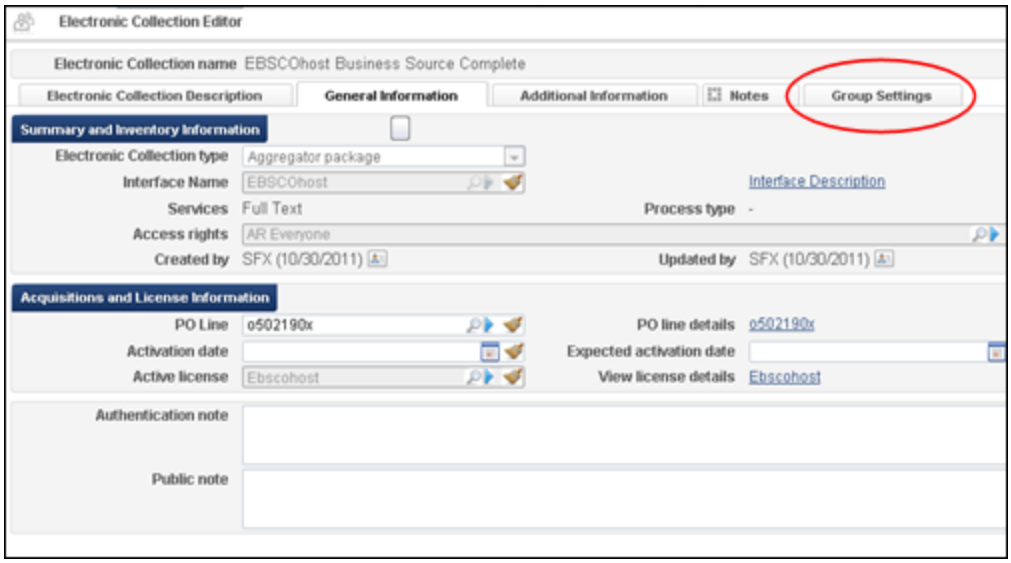


Figure 101 - Electronic Collection Editor

3 Go to the **Group Settings** tab and click **Add Settings for Group**. The Add Settings for Group dialog box opens.

Figure 102 - Electronic Collection Add Settings for Group Dialog Box

4 Select the Available For group from the available options in the drop-down list and update the Parameters section to match your requirements using the following parameters:

- Public name
- Authentication note
- Public note

5 Click **Save Settings**.

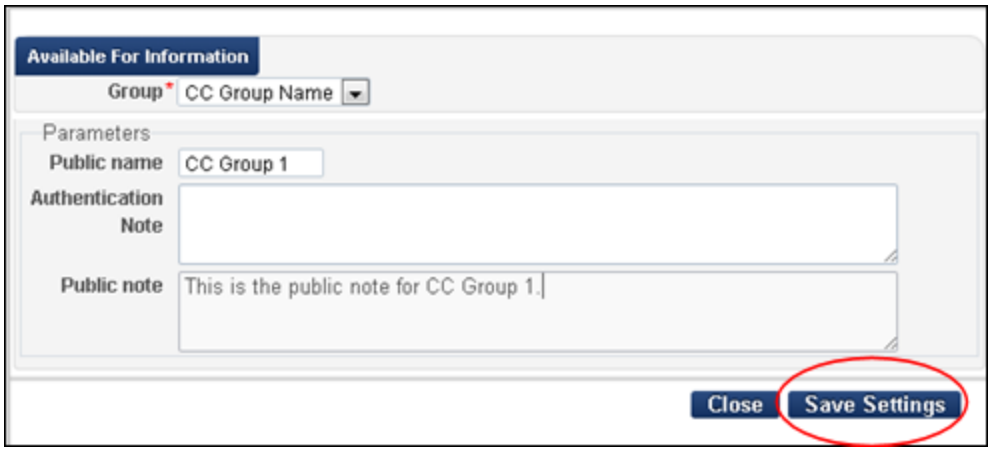


Figure 103 - Save Settings for the Electronic Collection Group Settings

The Group Settings tab is updated with your changes and the system provides the following informational message.

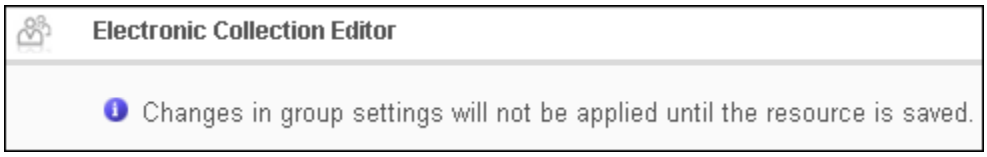


Figure 104 - Electronic Collection Editor Informational Message

6 Click **Save**. A confirmation message displays.

To configure the new group settings for Available For groups for electronic services:

1 Complete a repository search for an electronic collection.

2 Click **Edit Service** (for a specific collection). The Electronic Service Editor opens for that collection.

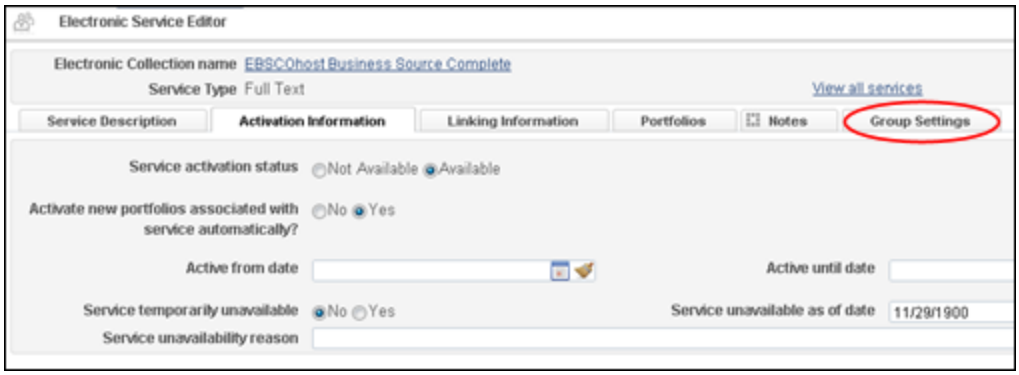


Figure 105 - Electronic Service Editor

3 Go to the **Group Settings** tab and click **Add Settings for Group**. The Add Settings for Group dialog box opens.

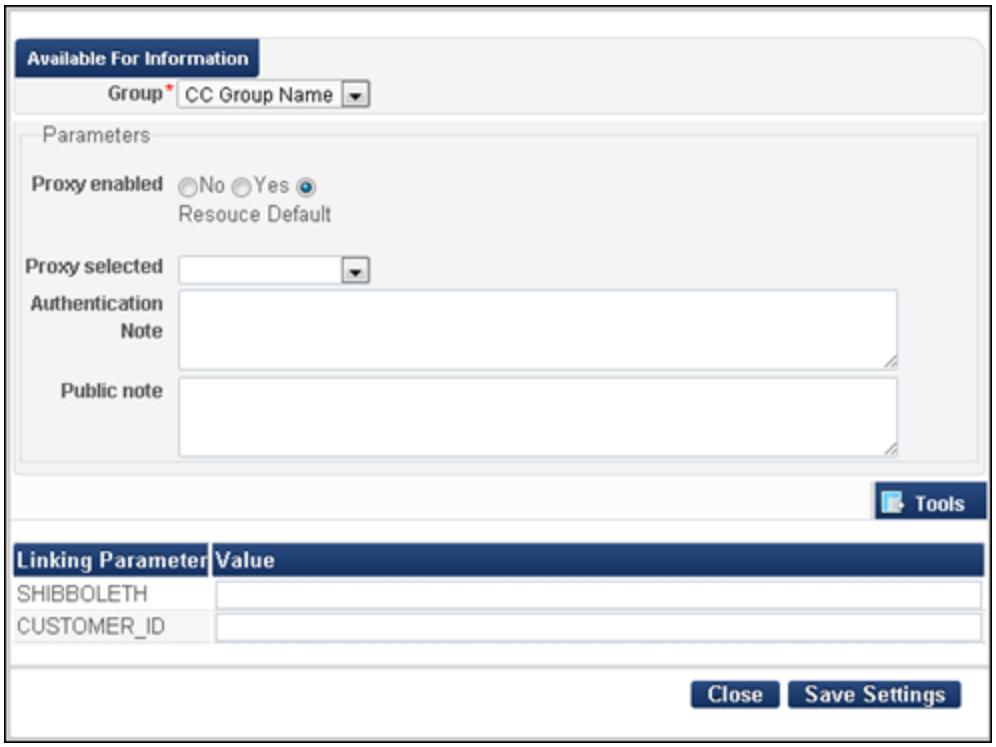


Figure 106 - Electronic Service Add Settings for Group Dialog Box

4 Select the Available For group from the available options in the drop-down list and update the Parameters section to match your requirements using the following parameters:

- Proxy enabled (yes, no, or use the resource default)
- Proxy selected (select from the available options in the drop-down list)
- Authentication note
- Public note
- Linking parameter values

  The linking parameters that are set for the group will be used in order to create the appropriate link by the UResolver.

5 Click **Save Settings**.

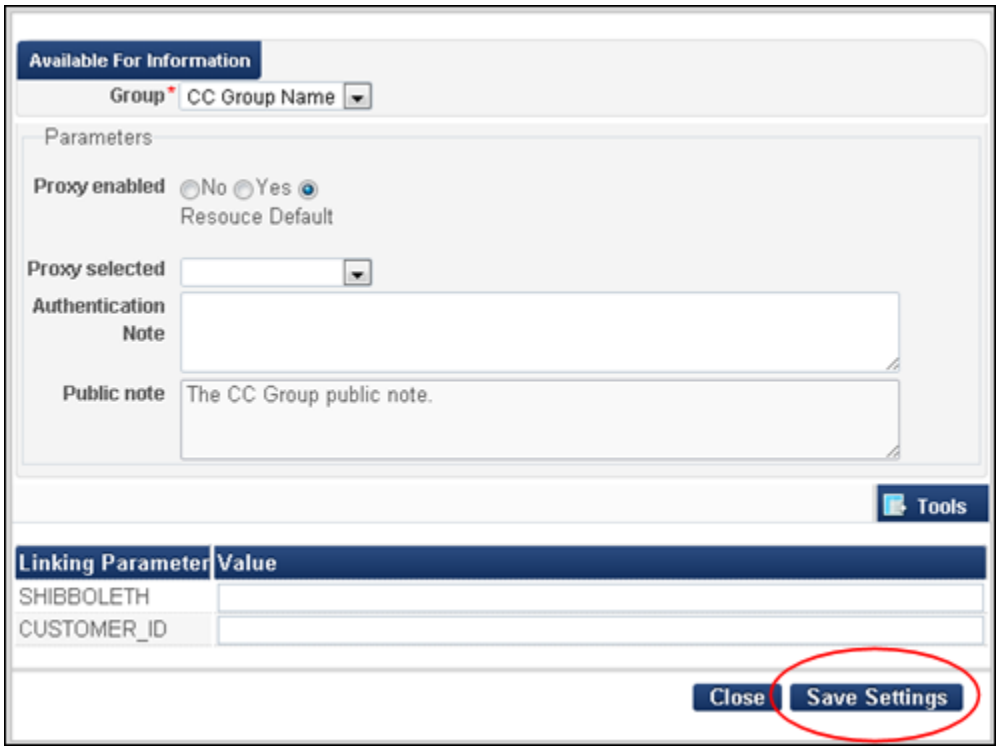


Figure 107 - Save Settings for the Electronic Service Group Settings

The Group Settings tab is updated with your changes and the system provides the following informational message.

Figure 108 - Electronic Service Editor Informational Message

6 Click **Save**. A confirmation message displays.

To configure the new group settings for Available For groups for electronic portfolios:

1 Complete a repository search for an electronic portfolio.

2 Click **Edit** (for a specific portfolio). The Electronic Portfolio Editor opens for that collection.

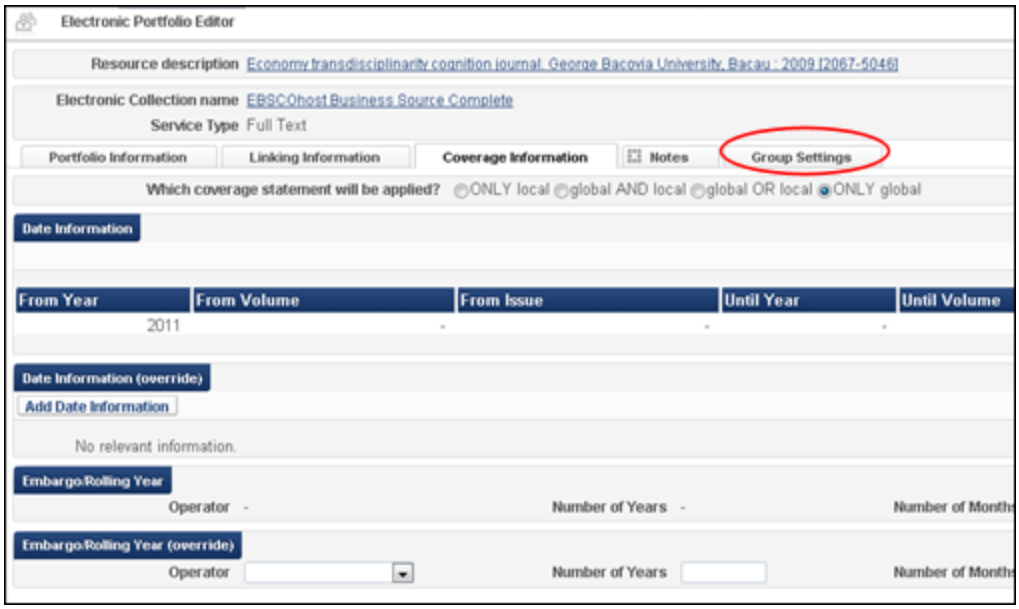


Figure 109 - Electronic Portfolio Editor

3 Go to the **Group Settings** tab and click **Add Settings for Group**. The Add Settings for Group dialog box displays.

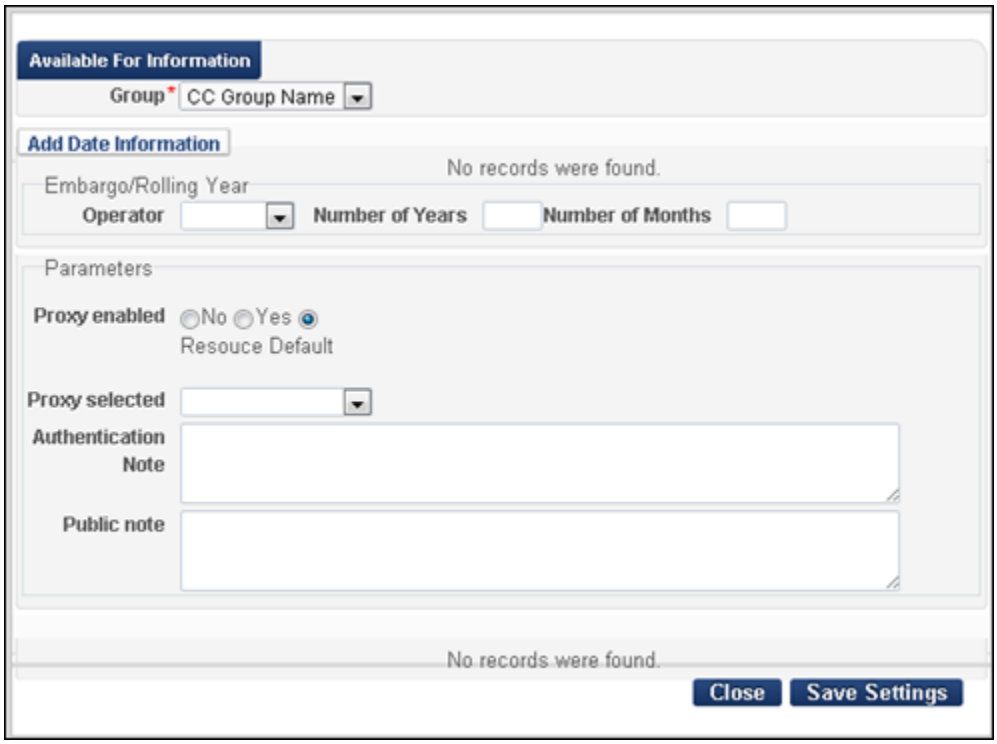


Figure 110 - Electronic Portfolio Add Settings for Group Dialog Box

4 Select the Available For group from the available options in the drop-down list and update the Parameters section to match your requirements using the following parameters:

- Proxy enabled (yes, no, or use the resource default)
- Proxy selected (select from the available options in the drop-down list)
- Authentication note
- Public note

(You may also update the previously available data/embargo information in this dialog box.)

5 Click **Save Settings**.

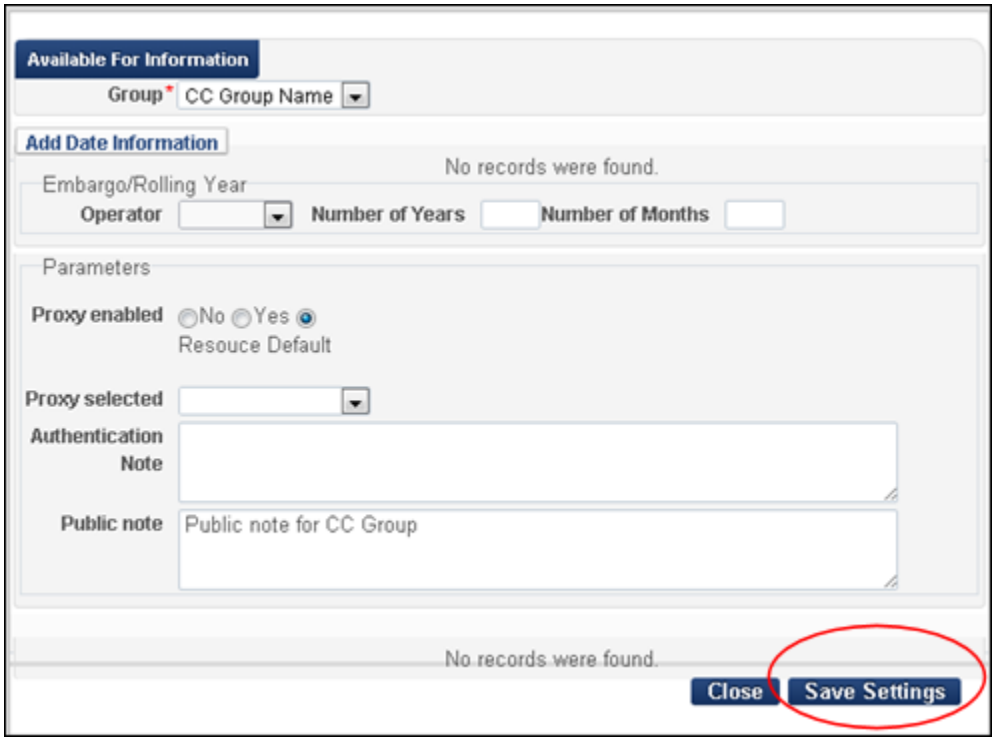


Figure 111 - Save Settings for the Portfolio Group Settings

The Group Settings tab is updated with your changes and the system provides the following informational message.

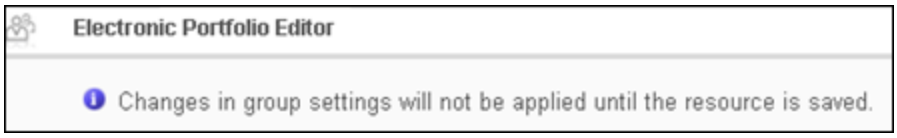


Figure 112 - Electronic Service Editor Informational Message

6 Click **Save**. A confirmation message displays.

Expanded Support for Associating Patrons with Campus/Library

Description

The purpose of this enhancement is to expand the options for associating a patron with a campus/library for the purpose of resolving electronic services based on group settings used by the Alma UResolver. Previously, patrons were associated with a campus/library based on the patron IP. With the November release, the system is able to associate a patron with campus/library information from the following sources:

- Logged in user – The patron is associated with the campus with which his/her logged-in user ID is affiliated.
- OpenURL base URL – The OpenURL base URL can now include the campus/library and, using this, associate the patron with the campus/library that is part of the OpenURL.

  See the figure below where –MAIN in the OpenURL request is the campus.

```
http://<base URL>/view/uresolver/01PRIN_INST/openurl-MAIN?&
u.ignore_date_coverage=true&rft.mms_id=996706770000121&rfr_id=
info:sid/primo.exlibrisgroup.com&svc_dat=viewit&test_access=true
```

Figure 113 – OpenURL Request URI Example Where -*MAIN* is the Campus

Once the user is associated with a campus/library from the various sources, Alma can locate the relevant Available For groups in order to determine the appropriate services to offer to the user via the Alma UResolver (View It).

Including Network Zone in Google Scholar/Primo Central Publishing

Description

The purpose of this enhancement is to create one holdings file for electronic resources that are managed in the Institution Zone (IZ) and Network Zone (NZ) in order to represent the full electronic holdings for the institution.

To include NZ holdings information at the IZ level, the following changes were made to the **Publish electronic records to Google Scholar** and **Publish electronic records to Primo Central** jobs:

- At the NZ level, the above publishing jobs must run a day prior to the execution of the same job in each member institution. The publishing jobs will store the relevant titles from the NZ as follows to be used by the member institutions:
  - Available For – Titles that are available for specific members only are placed in a member-specific directory per publishing type:
    - Primo Central: `<Alma_root>\<customer_ID>\<institution_ID>\output\Primo\nz<member institution code>`
    - Google Scholar: `<Alma_root>\<customer_ID>\<institution_ID>\output\GoogleScholar\nz<member institution code>`
  - All – Titles that are open for all institutions are placed in the regular designated directory:
    - Primo Central: `<Alma_root>\<customer_ID>\<institution_ID>\output\Primo`
    - Google Scholar: `<Alma_root>\<customer_ID>\<institution_ID>\output\GoogleScholar`
- At the IZ level, the above publishing jobs must run a day after the execution of the same job at the NZ level. The following changes were made to the jobs per publishing type:
  - For Primo Central, the job will merge holdings information from both directories (All and Available For) from the NZ and from the regular temporary directory for the institution in order to create a single holdings file.

- For Google Scholar, this job adds the following additional links to the `Institutional_links.xml` file:
  - All – Adds links to the holdings files that are stored in the regular Google Scholar directory for the NZ. For example:

    `https://alma.exlibrisgroup.com/rep/getFile?institution_code=01MY_INST&file=institutional_holding_0.xml`

  - Available For – Adds links to the holdings files that are stored in the member-specific Google Scholar directory for the NZ. For example:

    `https://alma.exlibrisgroup.com/rep/getFile?institution_code=01MY_INST&file=institutional_holding_0.xml&member_institution_code=01MY_INST`

Multi-Campus Support for Google Scholar/Primo Central Publishing

Description

The purpose of this enhancement is to enable institutions to create a holdings file for electronic resources that are specific to groups of campuses and libraries.

The Electronic Profiles section has been added to the **Publish electronic records to Google Scholar** and **Publish electronic records to Primo Central** jobs to allow customers to add profiles for groups of libraries and campuses that are defined as inventory management groups. This allows the publishing jobs to create additional holdings files at the campus/library level. These holdings files are placed in a group-specific directory per publishing type:

- Primo Central: `<Alma_root>\<customer_ID>\<institution_ID>\output\Primo\<e-Profile code>`
- Google Scholar: `<Alma_root>\<customer_ID>\<institution_ID>\output\GoogleScholar\<e-Profile_code>`

For Google Scholar, each campus/library group must register their group using the following format for registration links:

`https://alma.exlibrisgroup.com/rep/getFile?institution_code=01MY_INST&file=institutional_links.xml&profile_code=MY_GRP1`

The Google Scholar job adds additional links to the `Institutional_links.xml` file for group-specific holdings. For example:

`https://alma.exlibrisgroup.com/rep/getFile?institution_code=01MY_INST&file=institutional_holding_0.xml&profile_code= MY_GRP1`

For Primo Central, the associated job copies the holdings data that is available for all institutions to the e-Profile directory and merges it with the e-Profile data. Each campus/library group must register their group using the following format for PC Key links:

```
https://alma.exlibrisgroup.com/rep/getFile?institution_code=
01MY_INST&file=institutional_holdings.xml&profile_code=MY_GRP1
```

Technical Instructions

The Repository Administrator role can access this enhancement.

To add an e-profile:

1 On the Resource Management Configuration page in Alma (**Resource Management > Resource Configuration > Configuration Menu > Record Export**), click **Export Profiles**. The Publishing Profiles page opens.

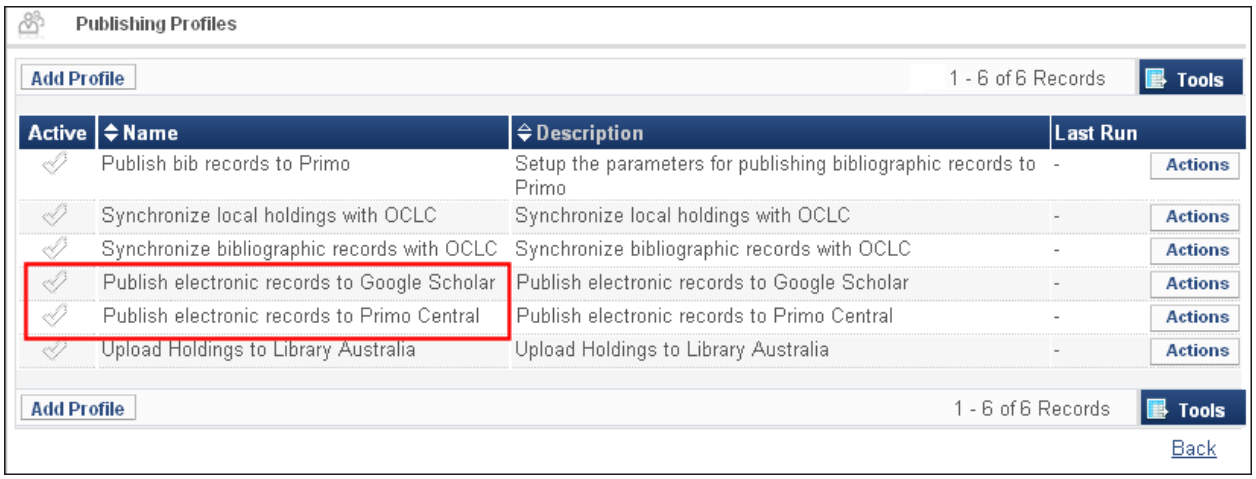


Figure 114 – Publishing Profiles Page

2 In the row that contains the **Publish electronic records to Primo Central** or **Publish electronic records to Google Scholar** profile, select **Actions > Edit**. The Publishing Profile Details page opens for the selected export type (for example, Primo Central).

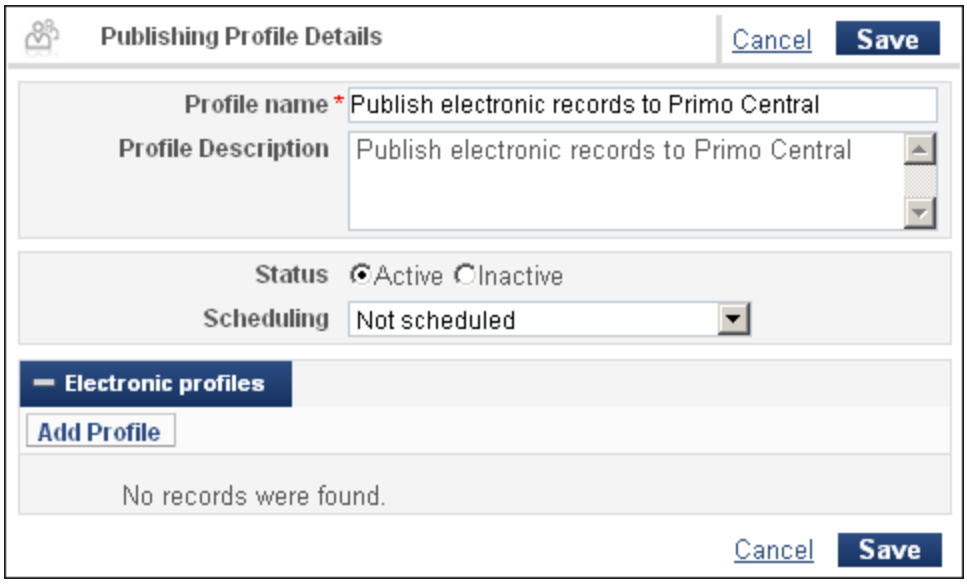


Figure 115 – Publishing Profiles Details Page for Primo Central

3 In the Electronic Profiles section, click **Add Profile** to open the Add Profile dialog box.

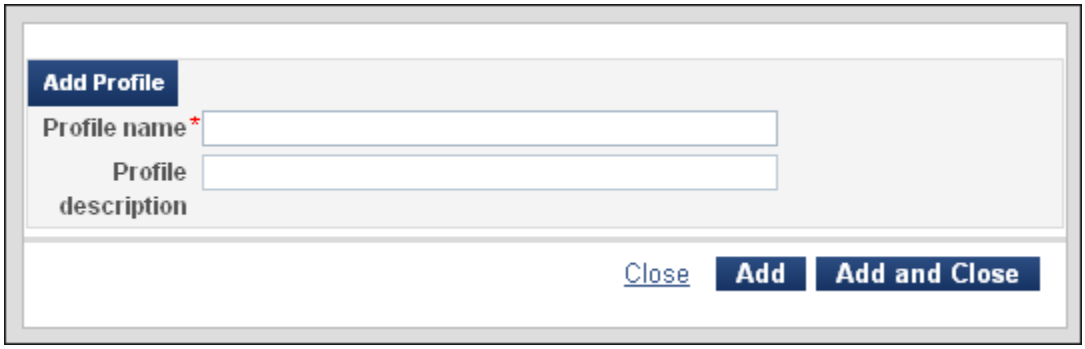


Figure 116 – Add Profile Dialog Box

4 Enter a profile name, an optional profile description, and click **Add and Close**. The new profile displays in the Electronic Profiles section on the Publishing Profile Details page.

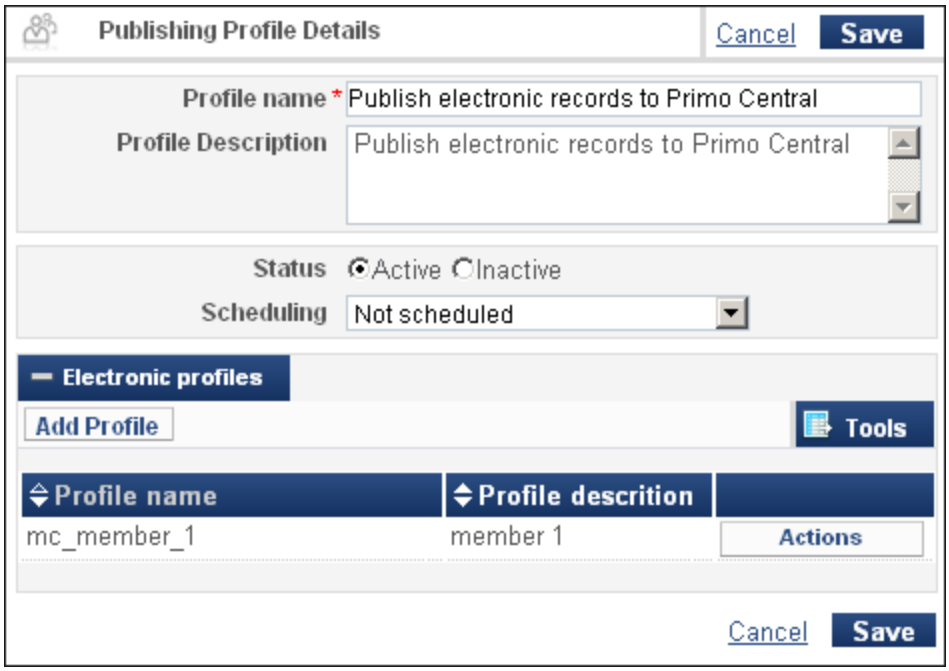


Figure 117 – Member Added to Electronic Profiles Section

5 Select **Actions > Edit** to edit the new profile. The Publishing Profile Details page for the selected member opens.

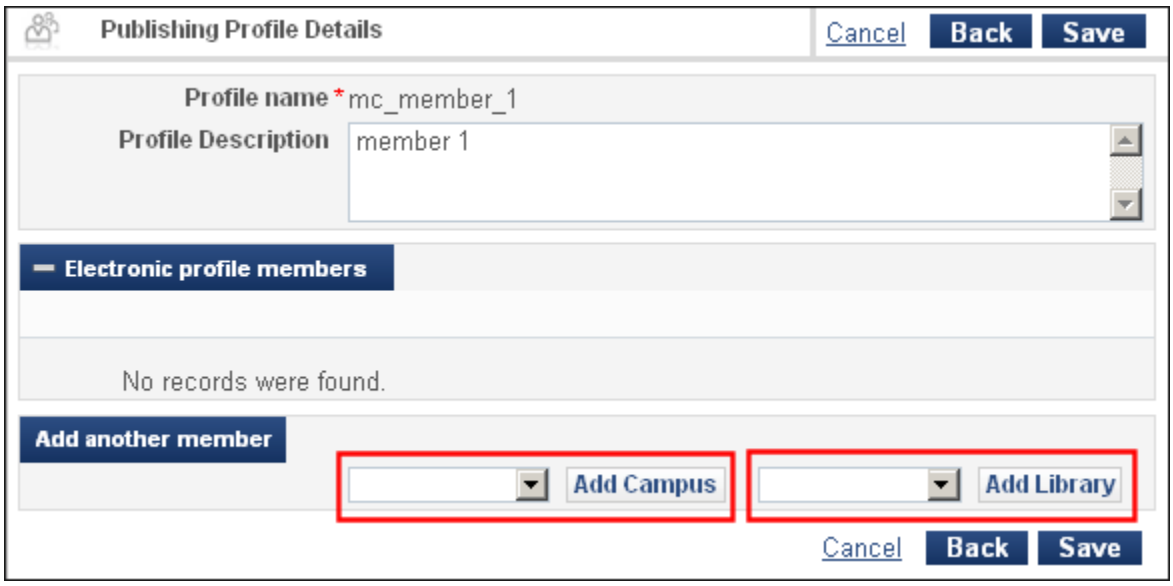


Figure 118 – Member – Publishing Profile Details Page for Primo Central

6 In the Add Another Member section, use the following fields to add members to the profile group:

- Campus – Select a campus from the drop-down list and click **Add Campus**.
- Library – Select a library from the drop-down list and click **Add Campus**.

You can add as many campuses and libraries as needed.

Note: Each profile group will have its own holdings files, which must be registered with the Primo Central/Google Scholar registration system.

7 Click **Save**.

Multiple Matches Across the Institution Zone and Network Zone

Description

The purpose of this enhancement is to provide more information related to NZ matched records in order to assist the operator in choosing which record to overlay or merge upon manual handling of records that have multiple matches in the NZ.

- A held-by indication at the record level that provides the user with information about the network members that are using the record
- The MMS ID of the record (to simplify searching for the record in the NZ, if necessary)

Technical Instructions

To resolve issues related to an import job, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator

To resolve issues of multiple matches:

1 On the Resolve Import Issues page (**Resource Management > Import > Resolve Import Issues**), locate the match files in question by running a search or using a filter, if necessary.

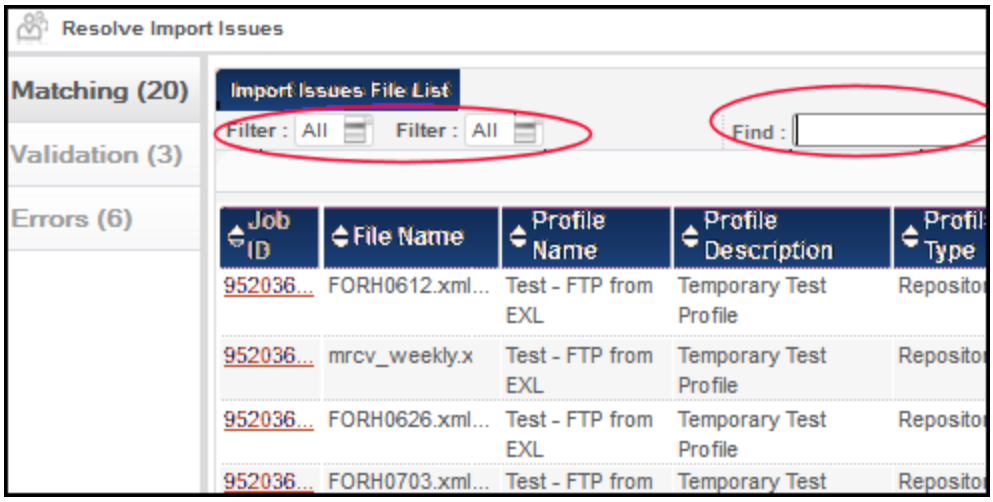


Figure 119 - Resolve Import Issues – All Job IDs

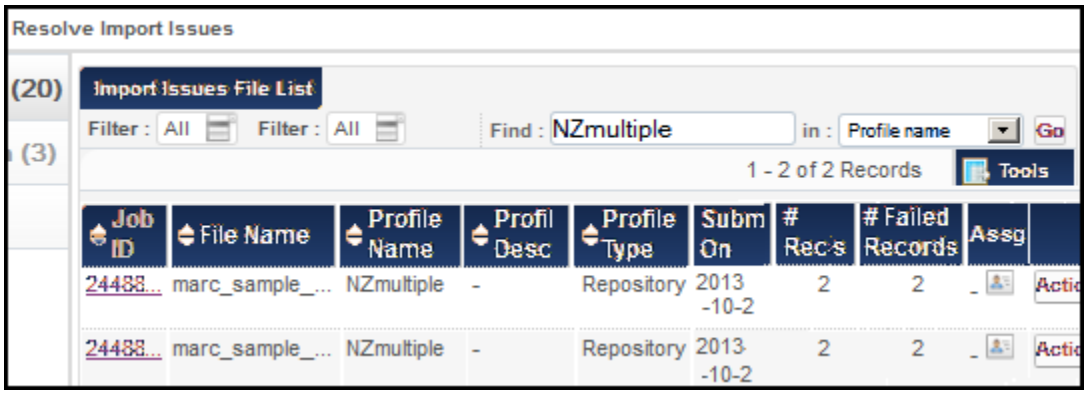


Figure 120 - Resolve Import Issues – Narrowed by Profile Name

2 Select **Actions > Edit** for the issue you want to resolve. The Handle Matching page opens.

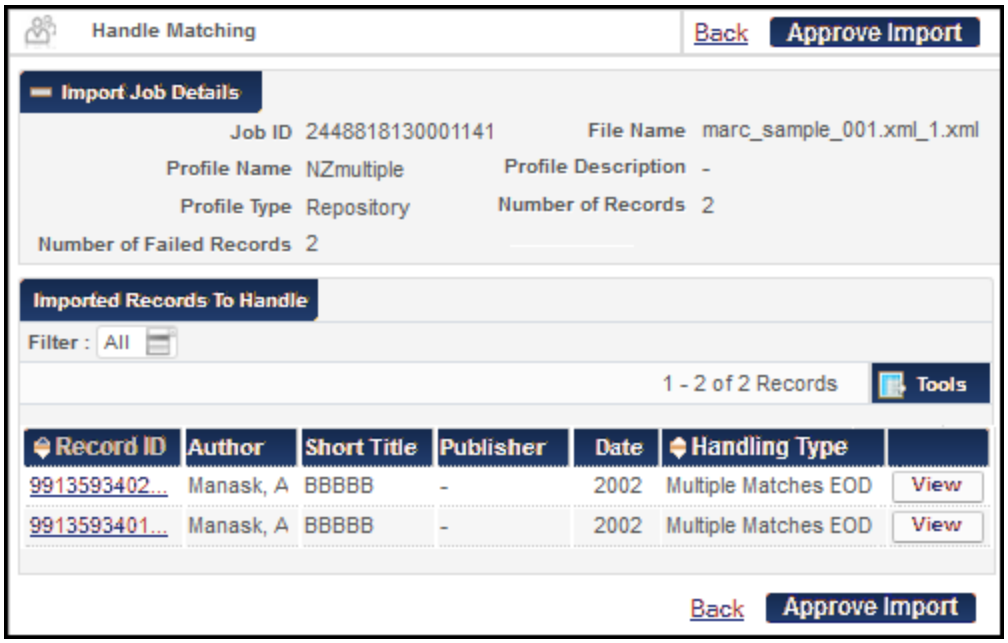


Figure 121 - Handle Matching Import Records

3 Click the **View** button corresponding to the record whose matches you want to view. The Import Record Matches page opens.

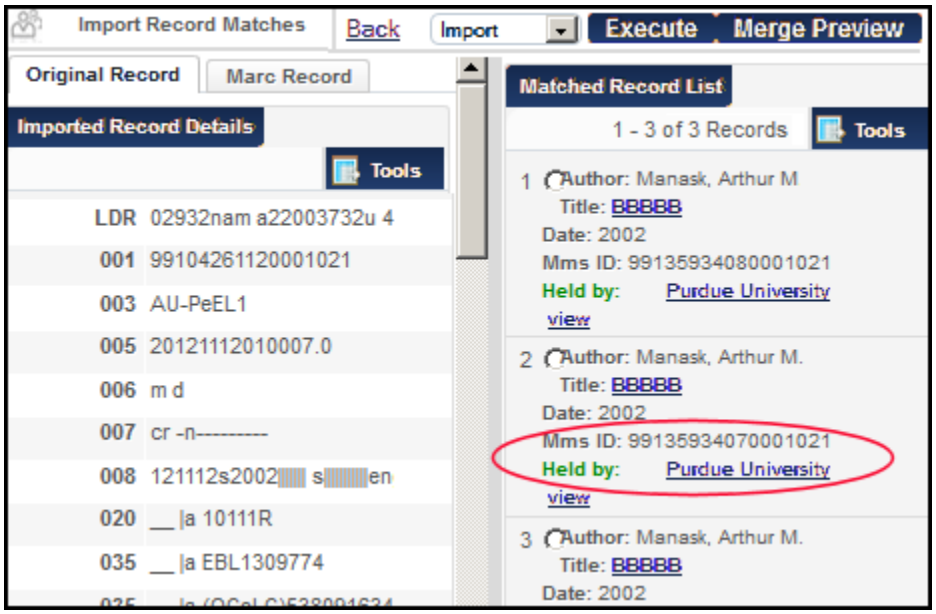


Figure 122 - MMS ID and Held by Information in Matched Record List

The MARC record displays in the left pane. In the right pane, a list of matched records display, with information new to this release of Alma:

- **MMS ID,** which can be used to search for matching records
- **Held by**, which can help the user determine which records to overlay, merge, and/or delete.

4 Perform actions using the drop-down list and buttons in the bottom right corner of the page.

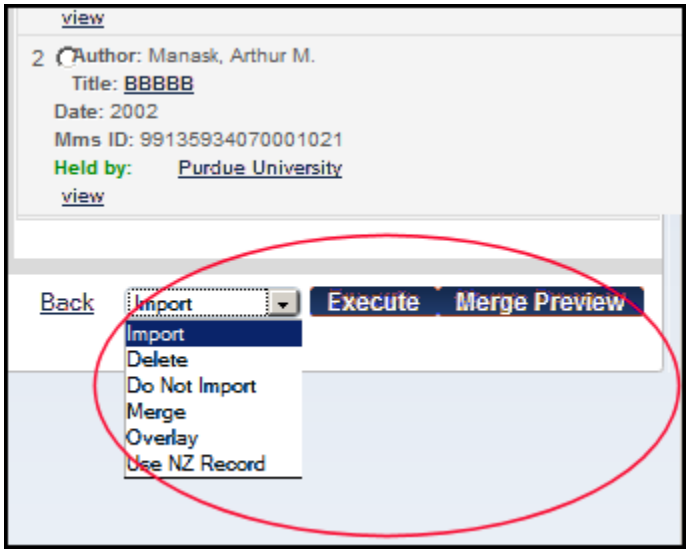


Figure 123 - Actions for Matching Records

Analytics

The following section describes the functions provided for Analytics in the November 2013 release of Alma.

ARL Analytics Reports for Items Added and Item Withdrawals

Description

The purpose of these reports is to provide American Research Libraries with standard reports that will assist them in calculating the number of items added and item withdrawals.

Note: You can also produce Excel spreadsheets of Unique Titles and E-Books for American Research Libraries. For detailed information, refer to the American Research Libraries Reports section of the *Alma Analytics Guide*.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Number of Items Added and Item Withdrawal reports in Alma Analytics:

1. Access Alma Analytics (**Administration > Analytics > Design Analytics**).
2. Open the Physical Items Dashboard (**Catalog > Shared Folders > Alma > Inventory > Dashboards > Physical Items**), select **Item Additions/Withdrawals**, and click **Open**.

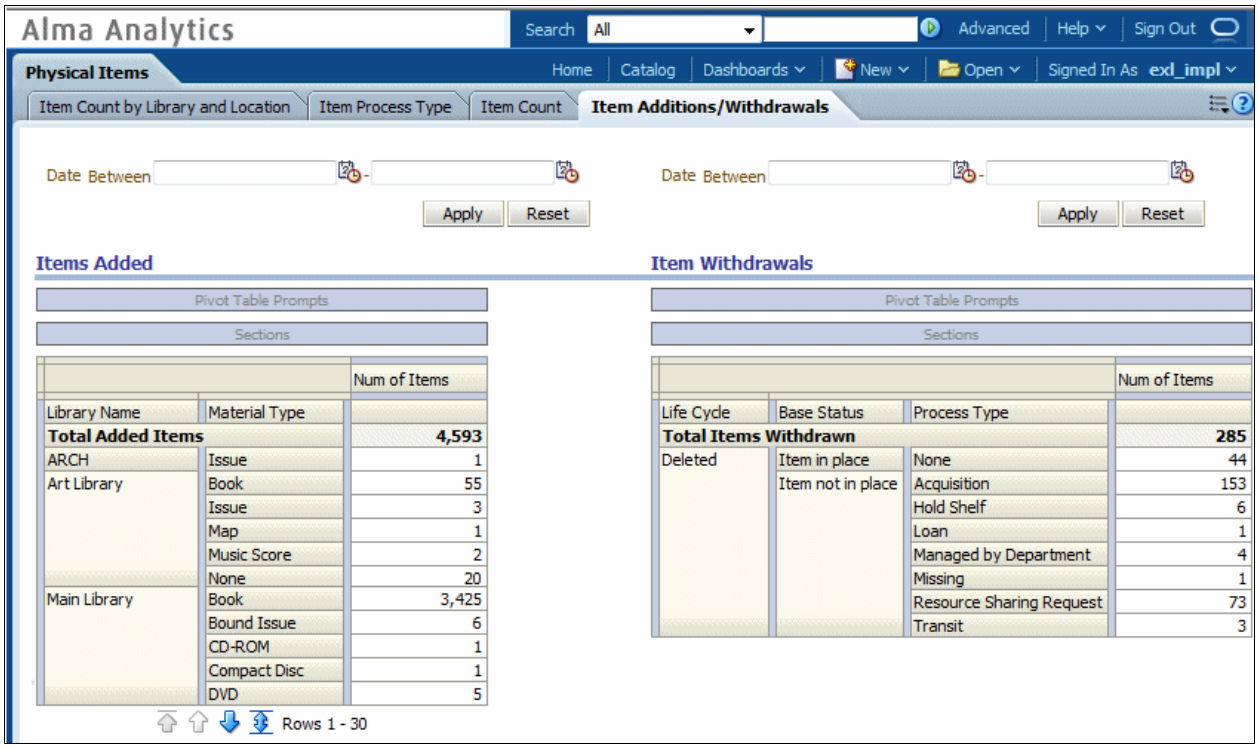


Figure 124 - Number of Items Added and Item Withdrawal Reports

Addition of Create Date and Modification Date to the Vendor Dimension in the Funds Expenditure Subject Area

Description

The purpose of this enhancement is to expose the Create Date and Modification Date in Funds Expenditure reports and dashboards. These fields indicate the date on which the vendor record was created and modified.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Create Date and Modification Date in Alma Analytics:

1. Access Alma Analytics (**Administration > Analytics > Design Analytics**).
2. Select **New > Analysis**.

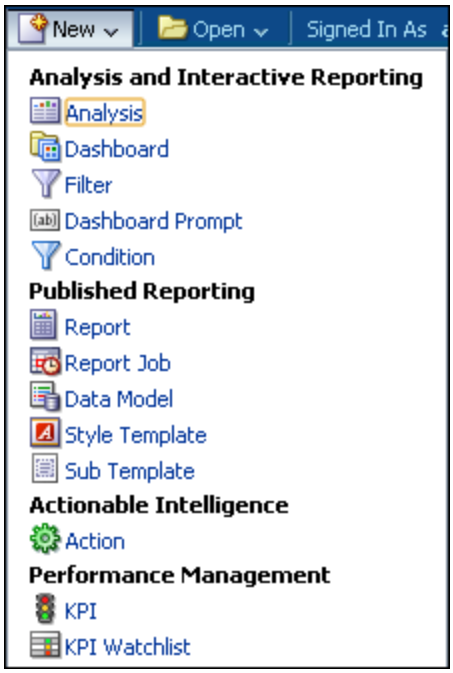


Figure 125 – New > Analysis Option

The Select Subject Area options are displayed.

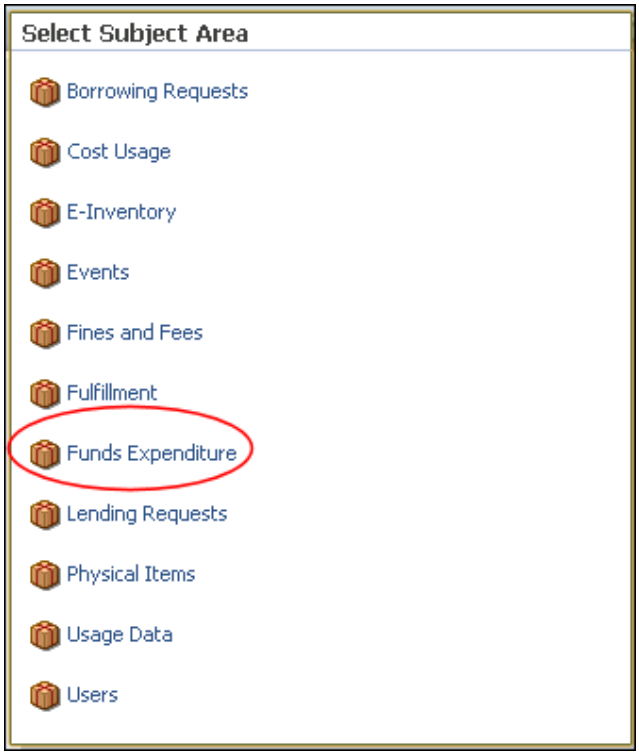


Figure 126 – Select Subject Area

3 Select **Funds Expenditure > Vendor > Create Date** or **Modification Date**.

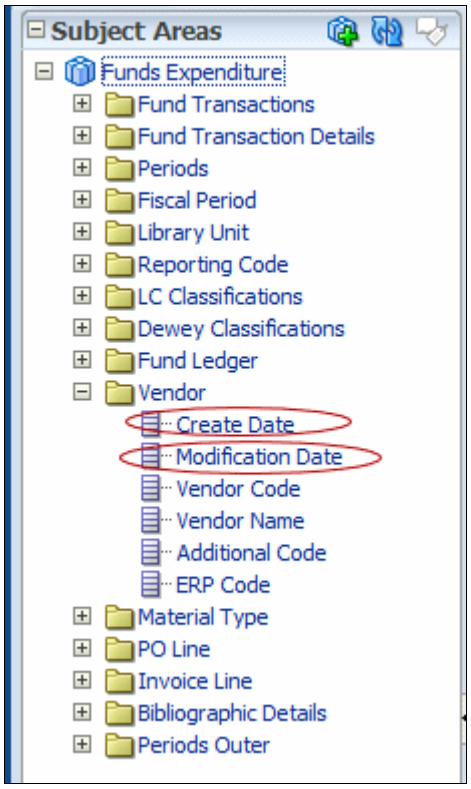


Figure 127 – Funds Expenditure Create Date and Modification Date

The following is an example of a report using Create Date and Modification Date.

Compound Layout

Title

Table

Vendor Name	Vendor Code	Create Date	Modification Date
100% EDUCATIONAL VIDEOS	100EDUVID-EL	2/15/2006	6/11/2012
2SIMPLEUSA INC.	2SIMPLE-EL	10/29/2004	6/11/2012
52 WOMEN	52WOMEN	1/16/2008	6/11/2012
5MTL.COM	5MTL	1/9/2008	7/2/2013
60 MINUTES CBS NEWS	60 MINUTES	1/10/2001	6/11/2012
84 CHARING CROSS, EH? BOOKSTORE	84 CHARING	9/12/1997	6/11/2012
A CAPPELLA	CAPPELLA	8/20/1999	6/11/2012
A K Film Production and Editing	KING	8/11/2011	6/11/2012
A&E HOME VIDEO	A&E	10/19/1995	6/11/2012
A-R EDITIONS, INC.	AR ED	5/8/1989	7/30/2012
A. & A. Farmar Book Publishers Ltd	FARMAR	4/13/2009	6/11/2012
A. GERITS & SON	GERITS	1/2/1985	6/11/2012
A.D.A.M., INC.	ADAM-EL	8/22/2006	6/11/2012
A.S. PRATT & SONS /THOMSON FINANCIAL	PRATT	10/21/1997	6/11/2012
A.S. PRATT & SONS/L	PRATT/L	11/4/2004	6/11/2012
ABACUS CONCEPTS	ABACUS	6/26/1992	6/11/2012
ABBEVILLE PRESS	ABBEVILLE	9/27/1993	6/11/2012
ABC NEWS	ABCNEWS	2/18/1999	6/11/2012
ABC VIDEO	ABC VIDEO	11/23/1998	6/11/2012
ABC-CLIO, INC.	ABC CLIO	5/8/1989	6/11/2012
	ABCCLIO-EL	3/14/2007	6/11/2012
ABDO PUBLISHING COMPANY	ABDO-EL	5/25/2004	6/11/2012
ABEBOOKS	ABE	6/17/2005	6/11/2012
ABEBOOKS FRANCE	ABEFR	11/10/2011	6/11/2012
ABEBOOKS GERMANY	ABEDE	11/30/2011	6/11/2012

Rows 1 - 25

Figure 128 – Funds Expenditure Create Date and Modification Date Report

Addition of Loaned By Dimension to the Fulfillment Subject Area

Description

The purpose of this enhancement is to provide information regarding the staff user who mediated the loan (that is, operated the circulation desk when the loan took place).

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Loaned By dimension in Alma Analytics:

1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).

2 Select **New > Analysis**.

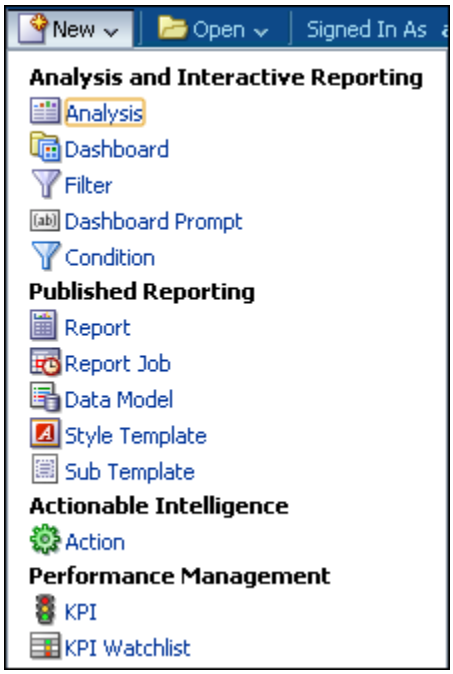


Figure 129 – New > Analysis Option

The Select Subject Area options are displayed.

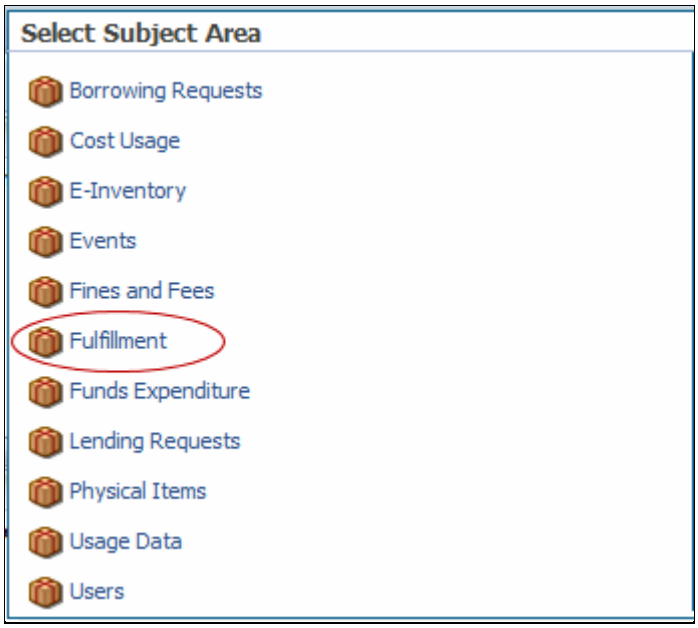


Figure 130 – Select Subject Area

3 Select **Fulfillment > Loaned By**.

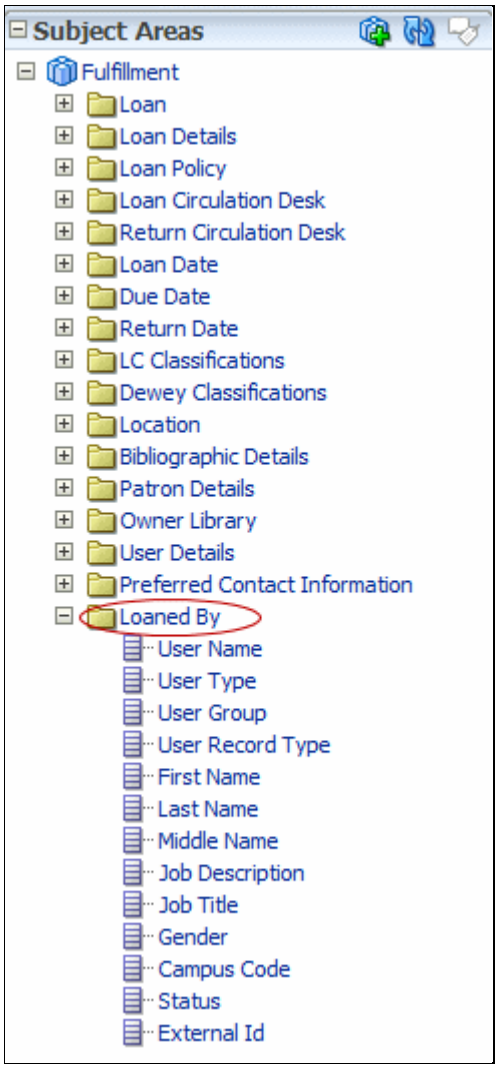


Figure 131 – Fulfillment Loaned By

The following is an example of a report using the User Name field of the Loaned By dimension:

Compound Layout

Title

Table

Item Id	Barcode	Is Booking Loan	User Name
23310221830001021	39031026901470	No	BRIANDWO
23310221920001021	39031030185227	No	FIELS
23310223280001021	39031023637085	No	BEMISM
23310223480001021	39031030659205	No	SANDONAT
23310223540001021	39031030659023	No	SEMANEK
23310223600001021	39031030659080	No	FABIANKA
23310224020001021	39031025266412	No	WUCM
23310224230001021	39031030659262	No	SANDONAT
23310224660001021	39031030659015	No	SANDONAT
			SCHWELM
23310224810001021	39031023613748	No	KOHL
23310224930001021	39031024002826	No	VERONEAJ
23310226000001021	39031025251273	No	LEFEBVGA
23310226010001021	39031025251349	No	LEFEBVGA
23310226800001021	39031031311228	No	DEHGHANI
			KOHL
23310227430001021	39031025284860	No	KOHL
23310228270001021	39031030559223	No	SPIEGEMI
23310229420001021	39031030788772	No	BARTOLAA
			MANAHATH
			SPIEGEMI
23310229430001021	39031031912223	No	MARSHRO

Rows 1 - 25

Figure 132 – Fulfillment Loaned By Report

Addition of Material Type to the Portfolio Dimension in the E-Inventory Subject Area

Description

The purpose of this enhancement is to provide information regarding the material type of the portfolio.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Material Type in Alma Analytics:

1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).

2 Select **New > Analysis**.

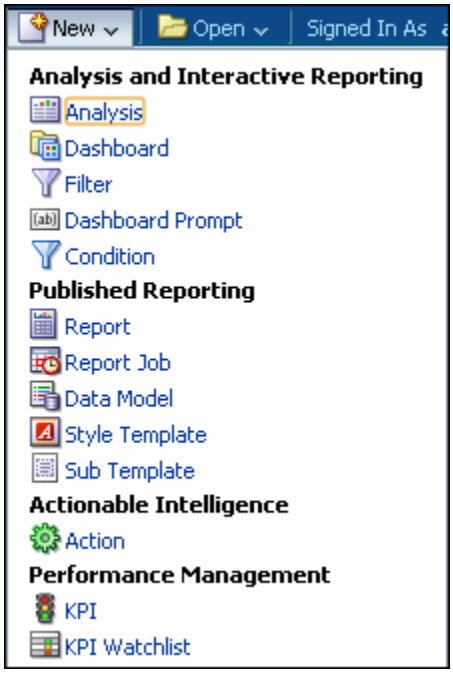


Figure 133 – New > Analysis Option

The Select Subject Area options are displayed.

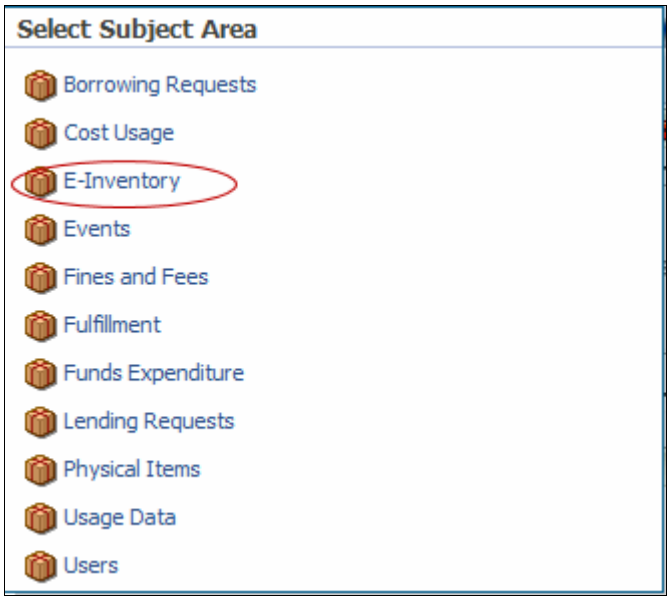


Figure 134 – Select Subject Area

3 Select **E-Inventory > Material Type**.

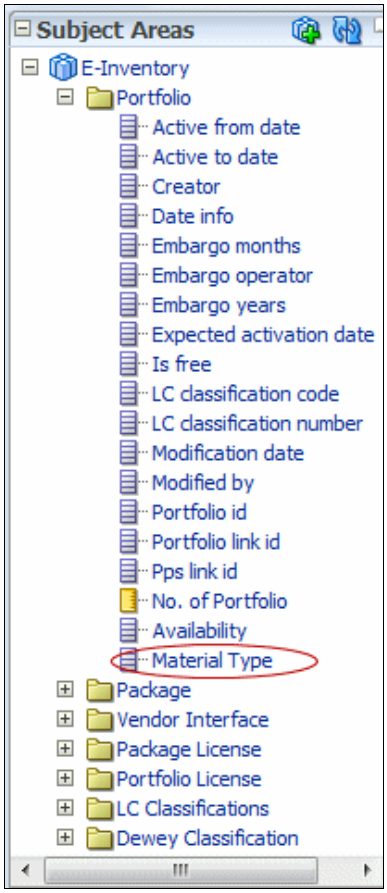
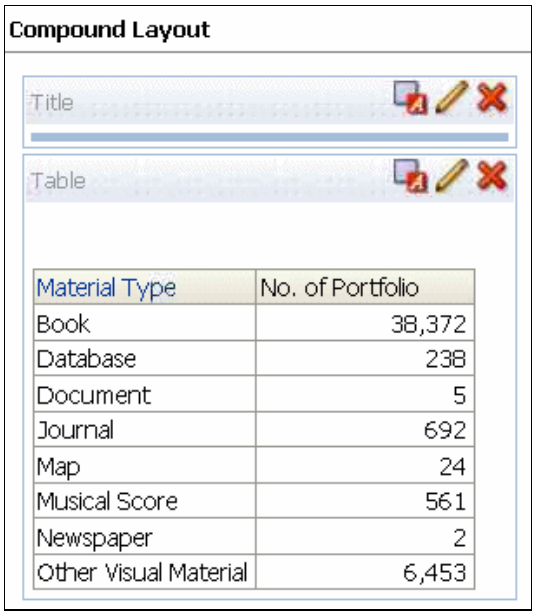


Figure 135 – E-Inventory Material Type

The following is an example of a report using the Material Type:



Material Type	No. of Portfolio
Book	38,372
Database	238
Document	5
Journal	692
Map	24
Musical Score	561
Newspaper	2
Other Visual Material	6,453

Figure 136 – E-Inventory Material Type Report

Addition of External ID to the Fund Ledger Dimension in the Funds Expenditure Subject Area

Description

The purpose of this enhancement is to provide information regarding the External ID of the fund that is detailed in the Fund Ledger dimension in the Funds Expenditure subject area.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the External ID in Alma Analytics:

1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).

2 Select **New > Analysis**.

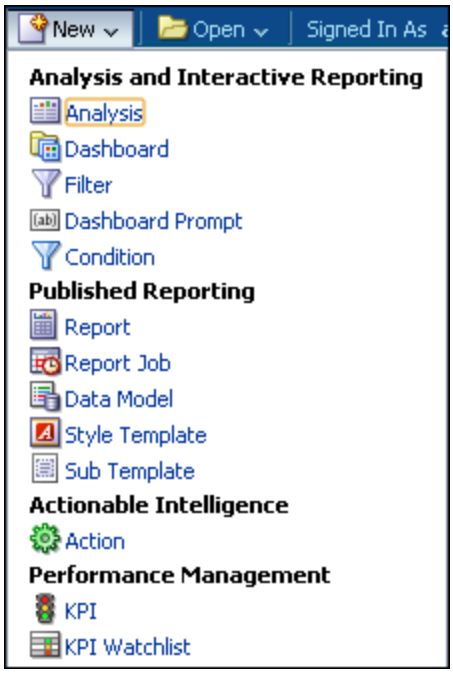


Figure 137 – New > Analysis Option

The Select Subject Area options are displayed.

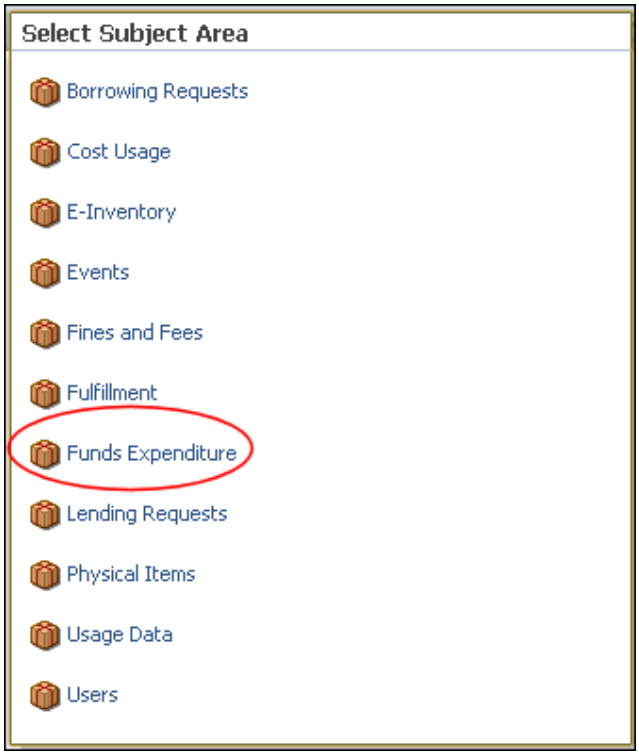


Figure 138 – Select Subject Area

3 Select **Funds Expenditure > Fund Ledger > External ID**.

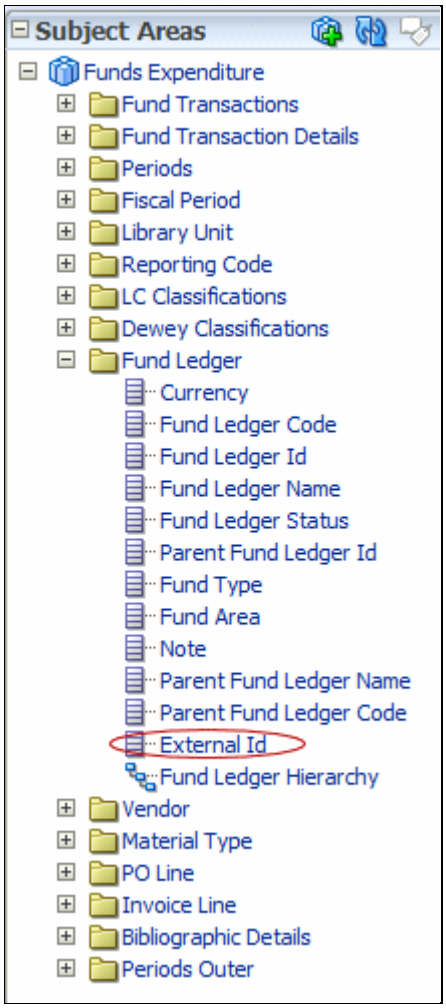


Figure 139 – Funds Expenditure External ID

The following is an example of a report using the External ID.

Compound Layout

Title

Table

Fund Ledger Code	External Id
ACA	2-13801-550
	213801550
	213810550
ACD	213801550
ACM	2-13801-550
	2-13810-550
ASP	2-13801-550
ASP-FUND	2-13801-550
ASY	213801550
AutoFundAlloc_0207131256	AutoFundAlloc_0207131256
AutoFundAlloc_0307130636	AutoFundAlloc_0307130636
AutoFundAlloc_0407130638	AutoFundAlloc_0407130638

Rows 1 - 25

Figure 140 – Funds Expenditure External ID Report

Addition of Is Booking Loan to the Loan Details Dimension in the Fulfillment Subject Area

Description

The purpose of this enhancement is to provide information on whether the loan on an item was the result of a booking request.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Is Booking Loan field in Alma Analytics:

1. Access Alma Analytics (**Administration > Analytics > Design Analytics**).
2. Select **New > Analysis**.

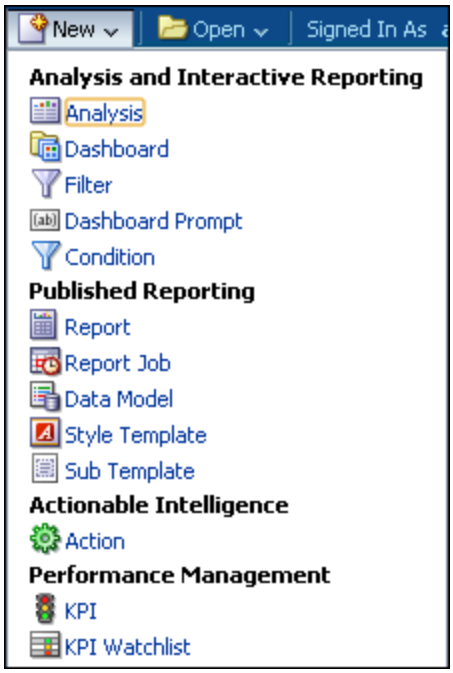


Figure 141 – New > Analysis Option

The Select Subject Area options are displayed.

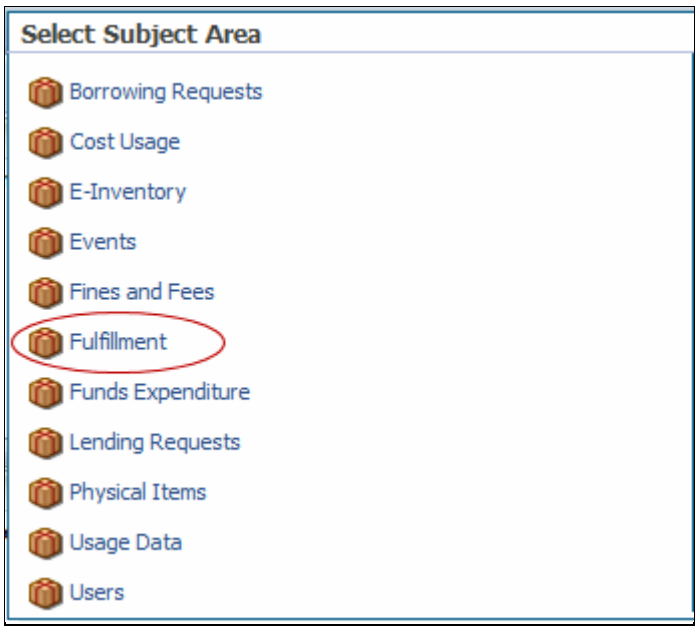


Figure 142 – Select Subject Area

3 Select **Fulfillment > Loan Details > Is Booking Loan**.

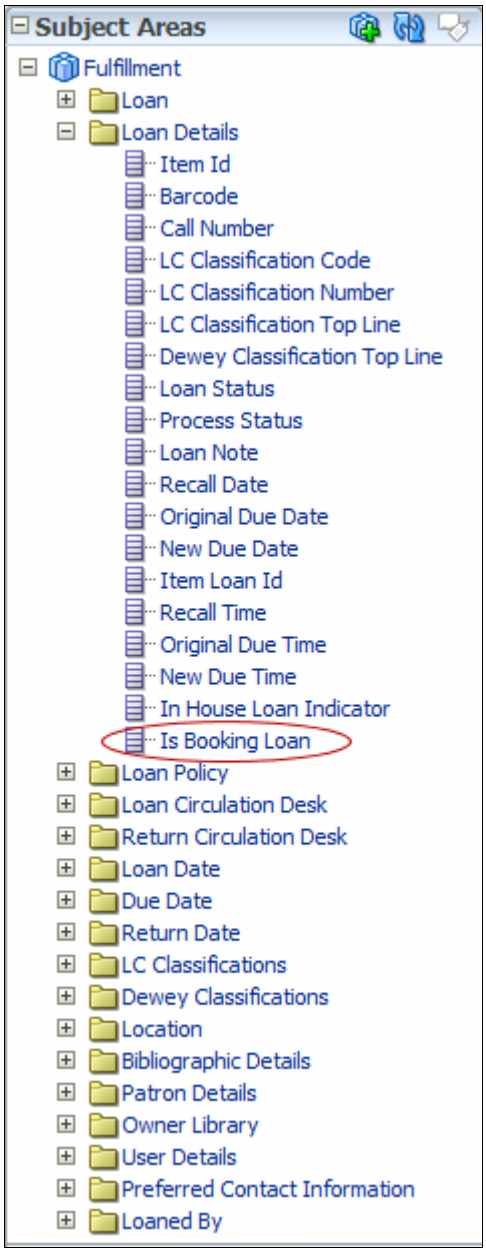
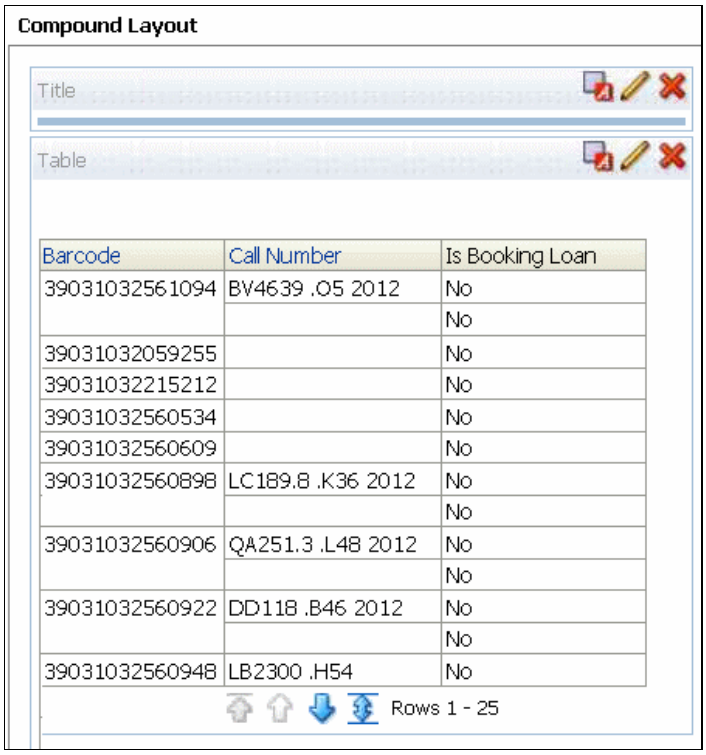


Figure 143 – Loan Details Is Booking Loan

The following is an example of a report using Is Booking Loan.



Compound Layout

Title

Table

Barcode	Call Number	Is Booking Loan
39031032561094	BV4639 .O5 2012	No
		No
39031032059255		No
39031032215212		No
39031032560534		No
39031032560609		No
39031032560898	LC189.8 .K36 2012	No
		No
39031032560906	QA251.3 .L48 2012	No
		No
39031032560922	DD118 .B46 2012	No
		No
39031032560948	LB2300 .H54	No

Rows 1 - 25

Figure 144 – Loan Details Is Booking Loan Report

Other Analytics Enhancements

- The reporting code is no longer set to **None** in the Analytics Fund Expenditures view. It is either set to the reporting code in the PO line (for encumbered PO lines that have not yet been invoiced) or the reporting code in the invoice (for invoiced PO lines).

Primo

The following sections describe the functions provided for Primo in the November 2013 release of Alma.

Direct Linking to Resource Sharing Form

Description

The purpose of this enhancement is to enable customers to access the Resource Sharing form directly via Primo instead of using the Citation Linker to perform resource sharing requests.

Technical Instructions

To configure this enhancement, you must add the Resource Sharing button to the main menu of Primo's Front End.

To add the Resource Sharing button to Primo:

1. In the Primo Back Office, click **Edit** to your view in the Views Wizard (**Primo Home > Ongoing Configuration Wizards > Views Wizard**).
2. Continue to the Tiles Configuration page in the wizard.
3. Select **Home Page** from the **Page** drop-down list to list the tiles associated with your view's home page.
4. Click **Edit Tile** in the row containing the Main Menu tile.

   The Edit Main Menu Attributes page opens.
5. In the Create new Label section, enter the following fields:
   - **Label** – Enter a display label for the Resource Sharing button.
   - **URL** – Enter a URL to access the Resource Sharing form in Alma, using the following format:

     `<pds_url>func=sso&url=<alma_api_base>/view/uresolver/<alma_institution>/openurl?rfr_id=info:sid/<alma_sid>&svc_dat=getit&directResourceSharingRequest=true`

     `For example:`

     `http://primo1.staging.alma.hosted.exlibrisgroup.com:8991/pds?func=sso&url=https://qa.alma.exlibrisgroup.com/view/uresolver/01MY_IN`

```
ST/openurl?rfr_id=info:sid/primo.exlibrisgroup.com-ALMA-
MY&svc_dat=getit&directResourceSharingRequest=true
```

- **Link** – Specify whether you want the results of the citation search to open in the current window or a new window/tab. The default value is current window.

6 Click **Add**.

7 Save and deploy your view.

Note: This change takes effect immediately in Primo.

Primo Request Submission

Description

The purpose of this enhancement is to notify customers who have made booking requests via Primo when their start and end dates have been adjusted to accommodate the library's closing times and dates. In My Account, Primo will now display the requested start and end dates in their respective date fields and continue to display the adjusted start and end dates in the status field.

Other Primo Enhancements

- The following additional fields are now transferred from Primo to Alma for the detailed display of loans: Item category (policy), Item status, Description, Main location code, Main location name, Secondary location code, Secondary location name, Call number, Call number 2 (alternative call number), Item ID, Item barcode
- Historical loans can now be viewed in Primo by setting the **view_historical_loans_in_primo** parameter in Alma (**Administration > General Configuration > Configuration Menu > Other Settings**) to **Yes** (Default=No). Loans will be viewable only until anonymization occurs.

Integrations with External Systems

The following sections describe the modifications made to several external system integrations for the November 2013 release of Alma.

OCLC Connexion Port Configuration

Description

The purpose of this enhancement is to consolidate the OCLC Connexion client communication with Alma to occur via a single port (5500), rather than multiple ports. This has been done to simplify implementation, while maintaining secure and separate access per institution to the service. Port 5500 is open on Ex Libris' end. Ensure that this port is open for your institution as well.

To support this enhancement, configuration is required in both Alma and OCLC Connexion (Client/Web) as detailed in the Technical Instructions below.

Note: Communication via existing ports will be supported for the next three months. Following this grace period, OCLC communication with Alma will be supported via port 5500 only.

Technical Instructions

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

Note: Only one profile should be configured in Alma.

To configure the OCLC Connexion profile to support communication via port 5500:

1. On the External System List page (**Administration > General Configuration > Configuration Menu > External Systems > External Interfaces**), click **Add External System** to define a new OCLC Connexion profile, or select **Actions > Edit** for an existing OCLC Connexion profile.
2. In the **Actions** tab or section, enter a password under **Authorization**.

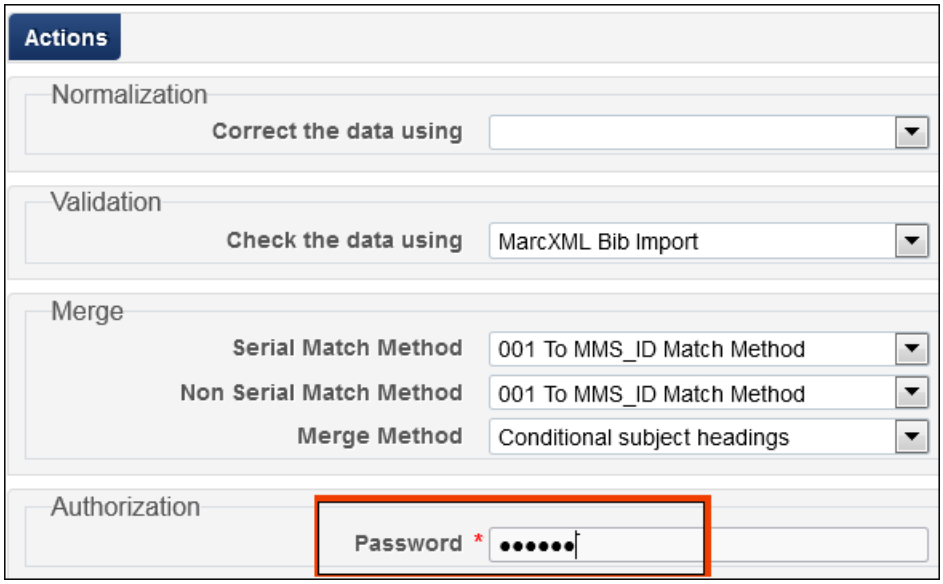


Figure 145 – Authorization Password

Note: This is not the password with which you connect to OCLC Connexion.

3 Click **Save**.

To configure OCLC Connexion to communicate with Alma via port 5500:

1 Access the OCLC Connexion export options (under **Tools > Options > Export > Create** in the Client, or under **General > Admin > Export Options** in the Web application).

2 In the **Host Name** box, enter your Alma host name, such as `alma.exlibrisgroup.com`.

3 In the **Port** or **Port Number** box, enter `5500`.

4 Select the **Send Local System Logon ID and Password** (Client) or **Send Logon ID** (Web application) check box.

5 In the **Logon ID** box, enter your Alma institution code, such as `01OO_INST`.

6 In the **Password** box, enter the same password you entered for the OCLC Connexion profile in Alma.

Note: Ensure that the **Send User ID** check box is not selected.

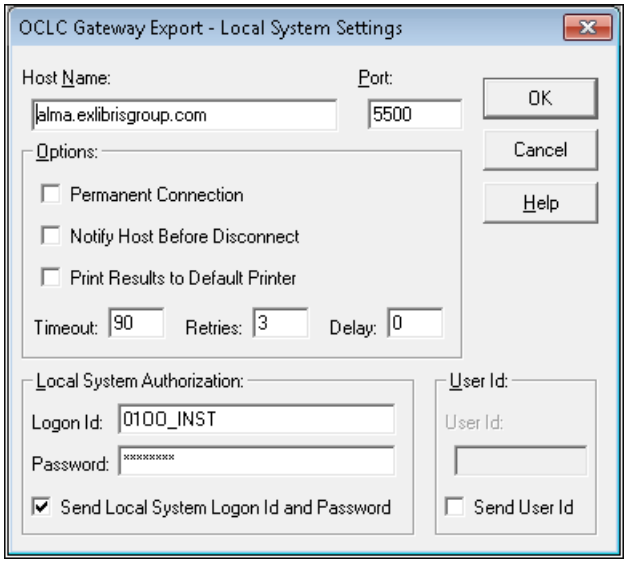


Figure 146 – Example of OCLC Connexion Client Settings

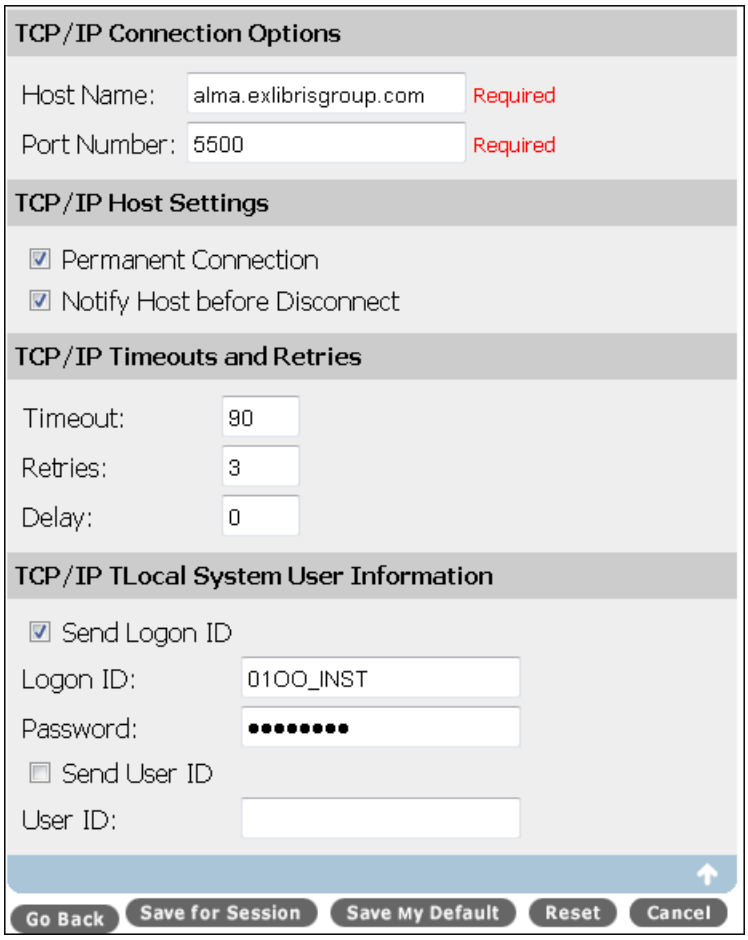


Figure 147 – Example of OCLC Connexion Web Application Settings

7 Click **OK** (Client) or **Save My Default** (Web application).

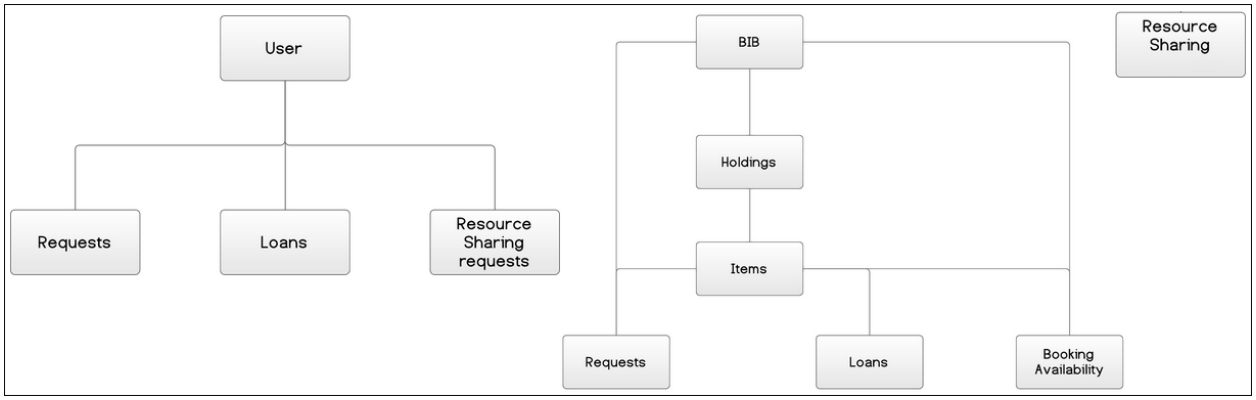
Other Integration-Related Enhancements

- There is a new field, **FTP server type**, on the Update S/FTP Connection page (**Administration > General Configuration > Configuration Menu > External Systems > S/FTP Definitions**). Ensure that you select **Default** from the drop-down list (MVS is for future use).
- A new field, **Authentication required**, was added to the Self-Check type of external system profile. If **Yes** is selected, the patron will be required to supply a password.
- The **System** (for Ex Libris' informational purposes) field in the Bursar, LDAP, Payment, Self-Check, and User types of external system profiles is now mandatory. If you attempt to manually run an existing profile that does not have this field defined, you will receive an error message indicating that you must first configure this field. Note that this issue does not affect scheduled jobs.
- SMS messages are now sent to users only if preferred SMS numbers are indicated. If no preferred SMS number is indicated for a user, an SMS message is not sent to the user.
- There is no longer a 10,000 limit on user block exports and bursar exports.

Alma RESTful APIs

Alma RESTful APIs supply an interface that supports direct interactions with other applications via HTTPS. Because REST APIs are based on open standards, you may use any Web development language to access the APIs.

The following API map illustrates the hierarchy of the newly developed Alma RESTful APIs:



The following functions have been made available via RESTful APIs for the November release:

- API for retrieving item information (`/bibs/{mmd_id}/holdings/{holding_id}/items`)
- API for creating user loans (`/users/{user_id}/loans or /bibs/{mmd_id}/holdings/{holding_id}/items/{item_pid}/loans`)
- API for creating hold requests (`/users/{user_id}/requests or /bibs/{mmd_id}/holdings/{holding_id}/items/{item_pid}/requests`)
- API for creating resource sharing requests (`/users/{user_id}/resource-sharing-requests`)
- API for managing resource sharing partners (`/partners/`)
- API for listing a patron's booking requests (`/users/00000012/requests`)
- API for exposing the booking calendar (`/bibs/{mmd_id}/booking-availability or /bibs/{mmd_id}/holdings/{holding_id}/items/{item_pid}/booking-availability`)
- API for placing booking requests (`/users/{user_id}/requests or /bibs/{mmd_id}/holdings/{holding_id}/items/{item_pid}/requests`)

For detailed information on the above RESTful APIs, refer to: http://support.exlibris.co.il/alma/restws/. This documentation includes all of the required information on the Alma RESTful APIs, including URLs, WADLs, and sample XMLs.

Alma Menu and General Interface Changes

The following sections describe the changes made to the Alma menu and other general interface elements in the November 2013 release of Alma.

Main Alma Menu Modifications

Description

The following modifications have been made to the main Alma menu in order to improve the general organization of the menus and to reduce duplication between the various sections:

- The General component has been renamed **Administration**.
- The Processes section has been moved from the Resource Management component to the Administration component. The section has been renamed **Manage Jobs**, and the subsections are now **Run a Job** and **Monitor Jobs**.
- The **Processes and Sets** section under Acquisitions is no longer available. The **Manage Sets** subsection is now available under **Acquisitions > Advanced Tools**. The Acquisitions processes can now be run and monitored by selecting **Administration > Run a Job** or **Administration > Monitor Jobs**, respectively.

The jobs that are available to be run on the Create Job – Select Job to Run page (**Administration > Processes > Run a Job**) differ depending on your role within Alma. The following table lists all the available jobs and the Alma roles required to view/run them:

Job	Required Alma Role
Sychronize bibliographic records with external catalog	Catalog Manager, Catalog Administrator
Suppress bibliographic records from discovery	Catalog Manager, Catalog Administrator
Link set records to Network Zone	Catalog Manager, Catalog Administrator
Identify brief records	Catalog Manager, Catalog Administrator
Export bibliographic records	Cataloger, Catalog Manager, Catalog Administrator

Job	Required Alma Role
Delete bibliographic records	Cataloger Extended, Catalog Manager, Catalog Administrator
Import CZ records from CN members task	Catalog Manager, Catalog Administrator
Export inventory entities	Repository Manager, Repository Administrator
Clean operational thumbnails	Digital Inventory Operator Extended, Repository Manager, Repository Administrator
Withdraw items	Physical Inventory Operator Extended, Repository Manager, Repository Administrator
Rebuild item description	Physical Inventory Operator, Repository Manager, Repository Administrator
Move physical items	Physical Inventory Operator, Repository Manager, Repository Administrator
Export physical item labels	Physical Inventory Operator, Receiving Operator, Repository Manager, Repository Administrator
Export physical items	Physical Inventory Operator, Repository Manager, Repository Administrator
Create physical item work orders	Fulfillment Services Operator, Fulfillment Services Manager, Fulfillment Administrator
Close lost loans	Circulation Desk Manager, Repository Manager, Fulfillment Administrator
Change physical item	Physical Inventory Operator, Repository Manager, Repository Administrator
Change loan to claimed returned	Circulation Desk Manager, Fulfillment Administrator

Job	Required Alma Role
Change holdings information	Physical Inventory Operator, Repository Manager, Repository Administrator
Change physical item requests	Fulfillment Services Manager, Fulfillment Administrator, Catalog Administrator
Change physical title requests	Fulfillment Services Manager, Fulfillment Administrator
Change electronic portfolio information	Electronic Inventory Operator, Repository Manager, Repository Administrator
Primo republish set of titles	Catalog Manager, Catalog Administrator
OCLC holdings republish set of titles	Catalog Manager, Catalog Administrator
OCLC bibliographic republish set of titles	Catalog Manager
Update PO line workflow for PO line set	Purchasing Operator, Purchasing Manager, Acquisitions Administrator
Update PO line transactions for PO line set	Purchasing Operator, Purchasing Manager, Acquisitions Administrator
Update PO line information for PO line set	Purchasing Operator, Purchasing Manager, Acquisitions Administrator
Update PO line status for PO line set	Purchasing Operator, Purchasing Manager, Acquisitions Administrator

Enhanced UI Tab Component with Visual Indication of Whether the Tab Contains Information or Is Empty

Description

The purpose of this enhancement is to provide an indication as to whether a specific tab contains information or is empty. Icons for each status are now available for every **Notes** and **Attachments** tab within Alma, as well as for the **Alerts**, **Invoice Lines**, **Associated PO Lines**, **Communications**, and **Interested Users** tabs on the PO Line Summary page.

The icon indicates that information is available in the tab. The icon indicates that there is no information in the tab.

For example:

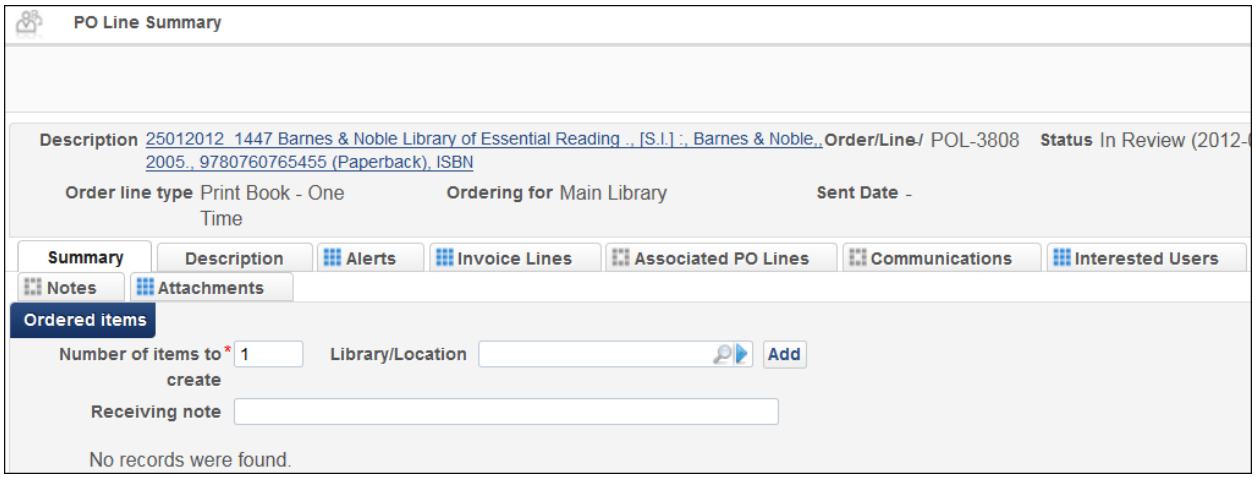


Figure 148 – PO Line Summary Tab with Examples of Both Types of Icons

Other Interface Enhancements

- The **Send Email to User** icon is now available on the User Details page.

Known Issues

- An issue was reported in Oracle's OBI relating to the version currently used by Ex Libris. The implication is that Alma Analytics will no longer function correctly for Chrome users upgrading to the latest version of Chrome (30) .

  For details, you can read the following:

  https://blogs.oracle.com/proactivesupportEPM/entry/obiee_problems_with_chrome_update

  https://blogs.oracle.com/proactivesupportEPM/entry/update_to_obiee_chrome_30

  Ex Libris is working on updating the OBI version in order to fix this issue. However, this will take time and the fix is expected only in Q1 2014 (still to be finalized). In the meantime, use other supported browsers.
- The ADD fields in the new resource sharing API do not work as expected.
- The coverage and embargo group settings (for a multi-campus environment) do not appear in Primo when clicking View It for a portfolio with these group settings.
- The demerits job that removes blocks caused by demerits does not run automatically. In order to run the job, contact Ex Libris Support and place a request to have the demerits job run.