



Best Practices and Efficiencies for Workflows in Alma

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Objectives and Audience

By the end of this session, you will understand ways to use Alma more efficiently and usefully for your library.

This session is for Alma users who are responsible for acquisitions, fulfillment, and resource management.

While the information *can* be useful to those just starting out in Alma, we will not be providing basic instruction in Alma workflows. **This session assumes you are already comfortable using Alma.**





Agenda

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Introduction

2

Acquisitions Workflows

3

Fulfillment Workflows

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Resource Management Workflows

5

Summary and Resources

Acquisitions

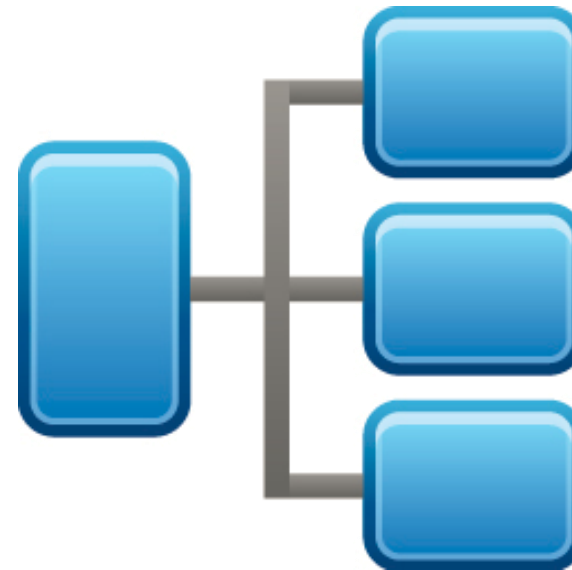
- purchasing/receiving
- invoicing
- record imports

Resource Management

- cataloging
- record imports

Fulfillment

- loans/returns
- requests
- resource sharing
- borrowing/lending
- course reserves



Alma Workflows- User Roles

Permission to view items or perform actions are enabled by privileges (which are grouped into roles):

Administrator: Configure workflow-related rules and profiles.

Managers and Operators: Carry out workflow activities.



Agenda



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Introduction

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Acquisitions Workflows ➔

- I. Ordering Considerations
- II. Receiving
- III. Invoice Workflow (No ERP)
- IV. Invoice Workflow (ERP)

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Fulfillment Workflows

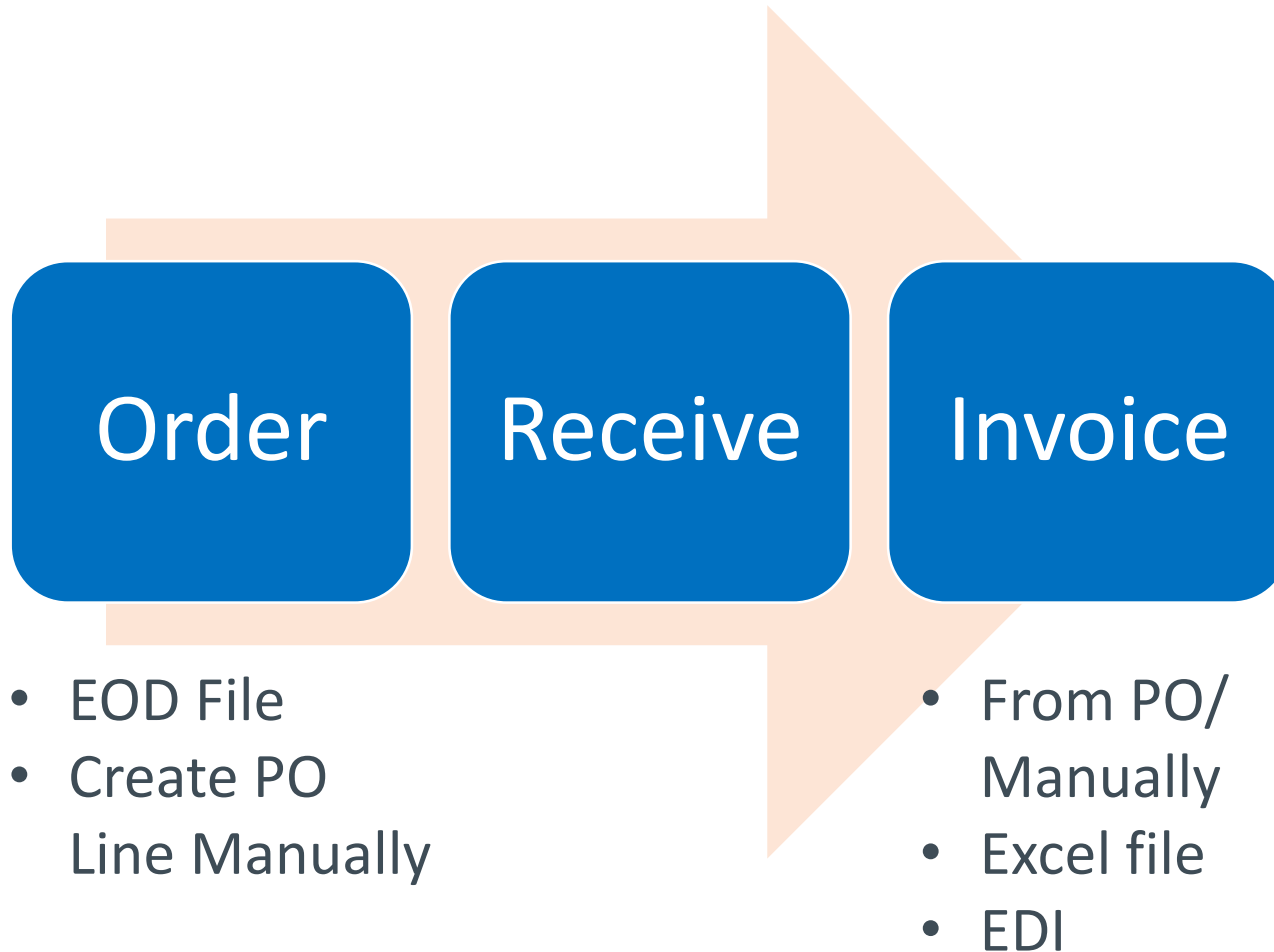
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Summary and Resources

Acquisitions Workflow



I. Ordering Considerations

Create purchase review rules and switch default rule from true (review) to false (skip review)



Acquisitions Configuration menu > Purchasing Review Rules

Name *	PO Review Rule				
Description	PO Review Rule				
Created By	-		Created On	-	
Updated By	Implementer, Ex Libris		Updated On	03/20/2014	

Input Parameters

Name	Operator	Value
AssertionCode	In list	<div>* Overdue PO line Previously canceled ordered resource Price limit reached Purchase decision exists</div>
AcquisitionMethod	In list	<div>* Any Approval Plan Depository Exchange</div>
VendorCode	In list	<div>Any</div>
POLineType	In list	<div>* Any Access Service - Subscription Database - Subscription Database - One Time</div>
SourceType	In list	<div>* Any API Import EOD Import Shelf Ready</div>

Output Parameters

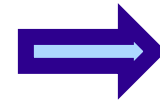
Name	Result
Result	<div>* True</div>

Ordering – Import Profiles

Acquisitions Configuration menu > Import Profiles

Set up unique profiles for different vendor accounts

New Order of Physical Material - Yankee Book Peddler



Create a specific profile that will only delete records if necessary.

Use naming conventions!! (see above)



Use a Technical PO Line for E+P orders

- Create an order line for each material type
- Primary order line (electronic); used for evaluation & payment processes
- Secondary order line (print); may be discontinued and may not require payment.
 - (secondary order line) has Acquisition method of "Technical"
 - (secondary order line) "Related POL" points to primary line



Create PO lines for electronic & print versions of an item:

1. Log in to Alma; change your “Currently at” location to an Acquisitions department if needed.
2. Go to **Resource Management > Search External Resources** and search OCLC WorldCat for *Confessions of a Shopaholic* by Sophie Kinsella – or title of your choice.
3. Find a record for an electronic **version** and click **Import**.

Exercise 1, continued

4. Click shopping cart icon



to order item.

5. Fill out PO line:

- Purchase Type: ***Electronic Book – One Time***
- Owning Library: ***Main Library***
- Choose a Material Supplier
- Enter List Price
- Select a Fund
- Acquisition method: Select either ***Purchase*** or ***Purchase at Vendor System***
- Note the **PO Line #** at top of screen!
- Select ***Order Now*** from drop-down
- Click ***Go***.

Exercise 1, continued

6. Go back to **Resource Management > Search External Resources** and search OCLC WorldCat for *Confessions of a Shopaholic* by Sophie Kinsella, or title you used for the electronic version.
7. Find a print book version and click Import.
8. Click shopping cart icon to order the item.



Exercise 1, continued

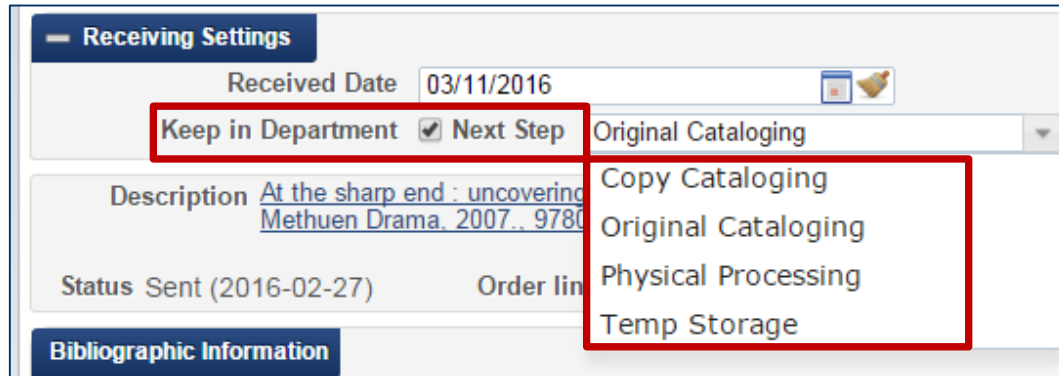
9. Fill out PO line:

- Purchase Order Type: ***Print book – one time***
- Owning Library: ***Main Library***
- Choose Material Supplier
- Acquisition method: select ***Technical***. (Do not fill in list price or fund; not required.)
- Open the **Additional** section. Search for your first PO line to associate that PO line to this one.
- Select ***Order Now*** from drop-down and click ***Go***.

10. Go to Acquisitions menu > Search for PO Line. Find by title to see both PO lines.

II. Receiving

Use “Keep in Department” functionality to assign “next step”



The screenshot displays the 'Receiving Settings' form. At the top, there is a 'Received Date' field with the value '03/11/2016'. Below this, the 'Keep in Department' section is highlighted with a red box. It contains a checked checkbox labeled 'Next Step' and a dropdown menu. The dropdown menu is also highlighted with a red box and lists four options: 'Original Cataloging', 'Copy Cataloging', 'Original Cataloging', and 'Physical Processing'. Below the dropdown, the 'Description' field shows the text 'At the sharp end : uncovering Methuen Drama, 2007.. 9780'. The 'Status' field shows 'Sent (2016-02-27)' and the 'Order line' field is partially visible. At the bottom, there is a 'Bibliographic Information' tab.

Administration > General configuration > Configuration Menu > Work Order Types

Receiving – Un-Receiving

Item can be un-received if ...

- It is still in the receiving department (“keep in department”)
- There are no requests or interested users
- It is part of a one-time order

Edit Inventory item
Done
Send to temporary storage
Send to copy cataloging
Send to physical processing
Print Slip
Un-Receive
View hidden

Receiving- Claiming

Use Claiming if item not received

- Parameters defined in vendor record.

Claim Date Calculation	Examples
Expected receipt date after ordering + claiming grace period	Order made on April 1 st . Expected receipt date after ordering of 5 days + grace period of 5 days. (10 days total). Expected arrival is April 11 th .
Serial issues: Receipt date of last-received issue + claiming grace period + subscription interval	Received last issue on April 1 st + claiming grace period of 5 days + subscription interval of 30 days. Expected arrival date: May 6 th .



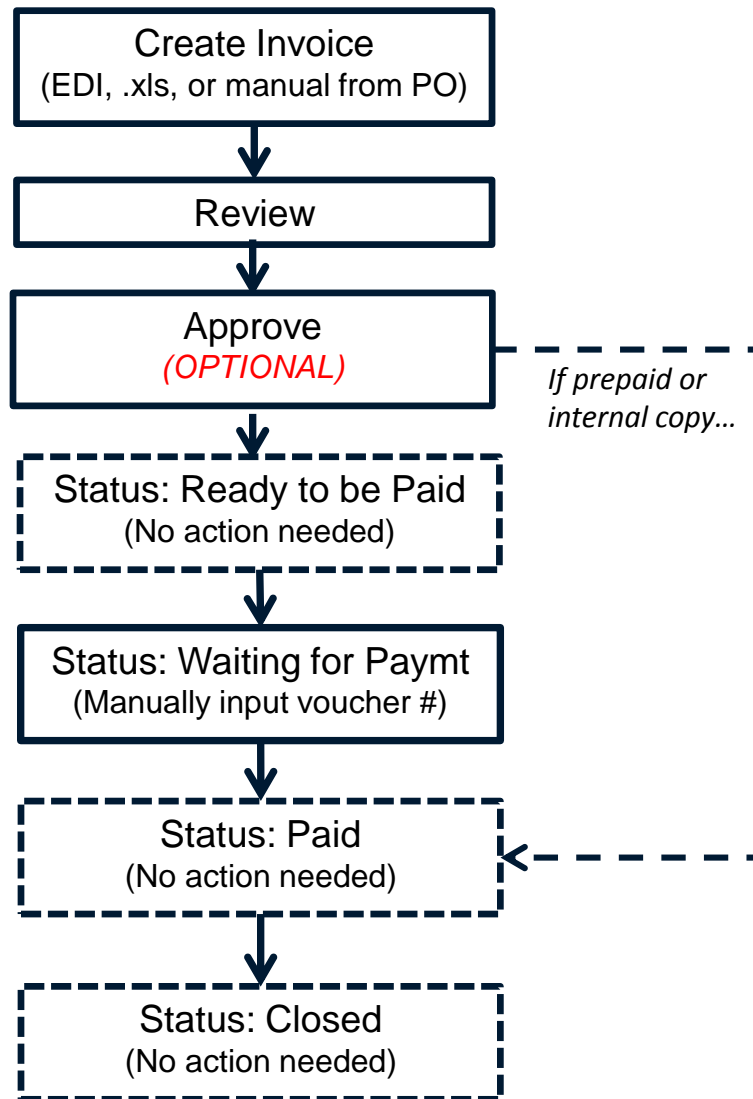
Claiming job runs nightly.

Acquisitions menu > Purchase Order Lines > Claim *or*
Claims Task List

Claim notifications:

- For Physical one-time items: Claim letter automatically sent from Alma to vendor
- For Subscription/continuous and Electronic POLs: Manually send email to vendor from PO Line > Communications tab

III. Invoice Workflow (No ERP)



Invoice Workflow : Prepaid Invoices (No ERP)

Prepaid checkbox is enabled when payment is ***not** handled by Accounting.*

Payment

Prepaid ☒

Internal Copy ☐

Export to Financial Sys. ☐

Payment status Paid

Voucher date 14/02/2013

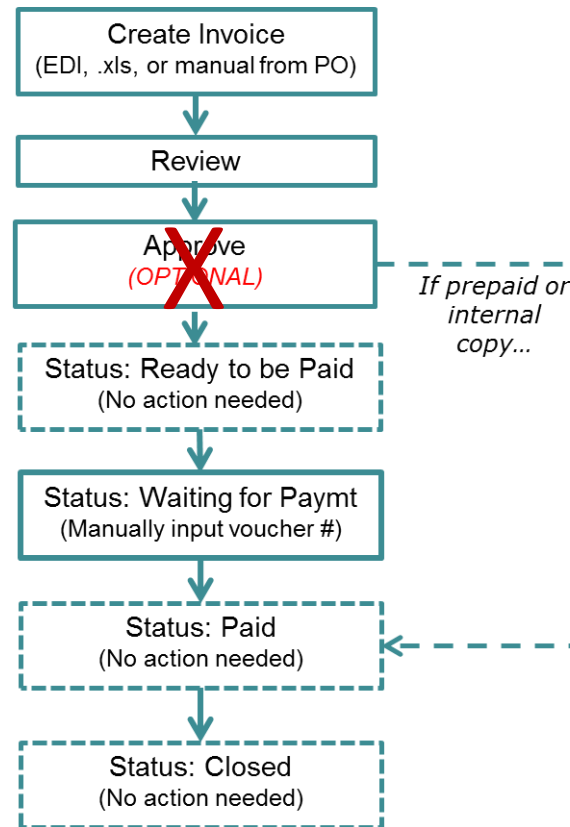
Voucher number 54

Voucher Amount* 98.95 USD

Invoice Workflow Considerations (No ERP)

- If ERP is not used for invoicing, skip Ready to be Paid and move directly to Waiting for Payment or Closed.

Invoicing Workflow



Invoice Workflow Considerations (No ERP)

Configure *skipping* Ready to be Paid step:

- [Acquisitions Configuration Menu > General > Other Settings](#)
- Click **Customize** button and set **invoice_skip_erp** parameter value to *true*

Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
	assertion_over_po_line_pric	acquisition	1000		exl_impl	28/01/2014	Restore
	auto_claim	acquisition	Y	Send Claim notification to ve	-	-	Customize
	expended_from_fund_default	acquisition	true		-	-	Customize
	exportPrepaidInv	acquisition	false	Invoice to be exported to ER	-	-	Customize
	handle_invoice_payment	acquisition	true		-	-	Customize
	invoice_allow_vat_in_line_le	acquisition	false		-	-	Customize
	invoice_high_total_price	acquisition	2500		-	-	Customize
	invoice_not_unique	acquisition	false		-	-	Customize
	invoice_prefix	acquisition	INV-		-	-	Customize
	invoice_skip_erp	acquisition	false	Dont send invoices to ERP.	-	-	Customize

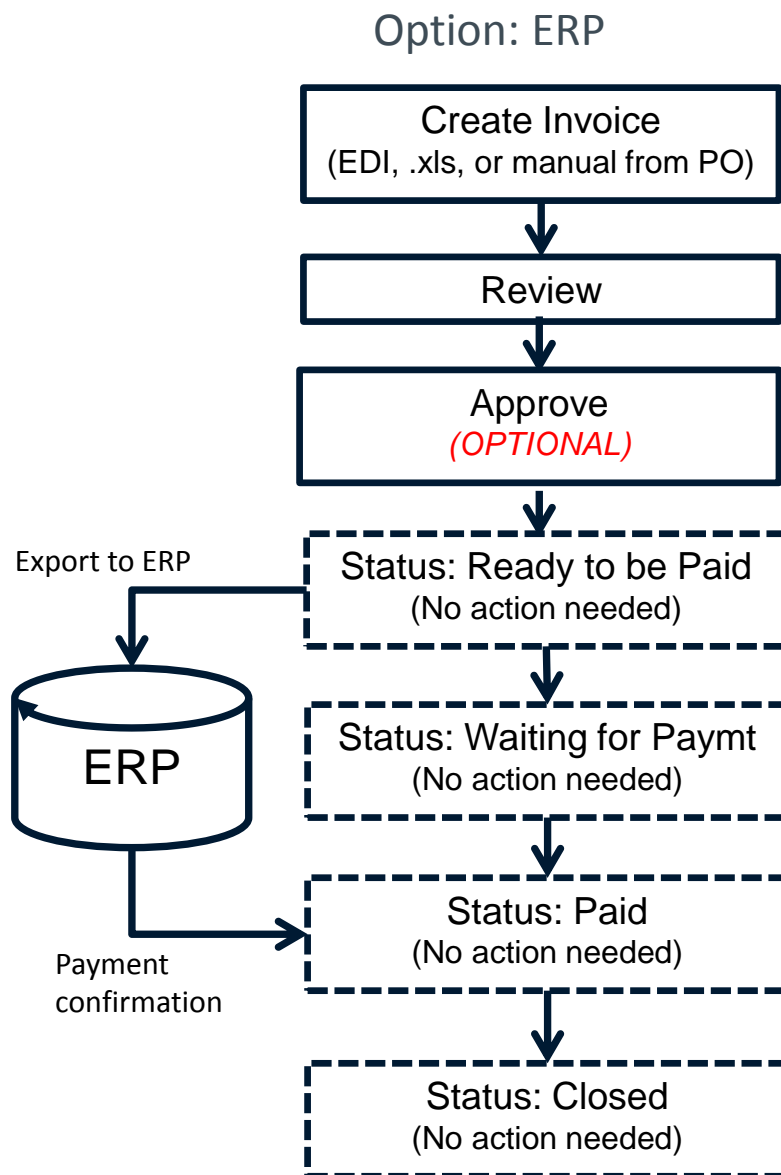
Invoice Workflow Considerations (No ERP)

Disable payment on all invoices if not using ERP integration

Acquisitions Configuration > Configuration Menu > Other Settings

- "handle_invoice_payment" to "false"
- **Waiting for Payment** requires a voucher # to close the invoice
 - Invoices that pass the review stage immediately close
 - If a voucher number is needed, you can record it even after the invoice is closed
 - If invoice needs to be altered, it should be set back to Review

IV. Invoice Workflow (ERP)



Invoice Workflow : ERP Configuration step

Administration > General Configuration > External Systems

1) Set up S/FTP connection details

Update S/FTP connection

Name Invoice payments ID 46591210000521
Definition Type FTP Created by exl_support (10/30/2012)

S/FTP Connection Details

Name Invoice payments
Description Invoice payments
Server ftp.exlibris-usa.com Username public
Port 21 Password *****
Sub-directory alma Max. Number of Files 10000
Min. Number of Files 1 Max. file size 100000
Size type MB Allow Navigation True
Ftp Server Secured No

2) Set up Integration Profile

External System

External System Code pay_invoices Name Pay Invoice Integration Type Finance

General Information Actions Contact Info

Actions

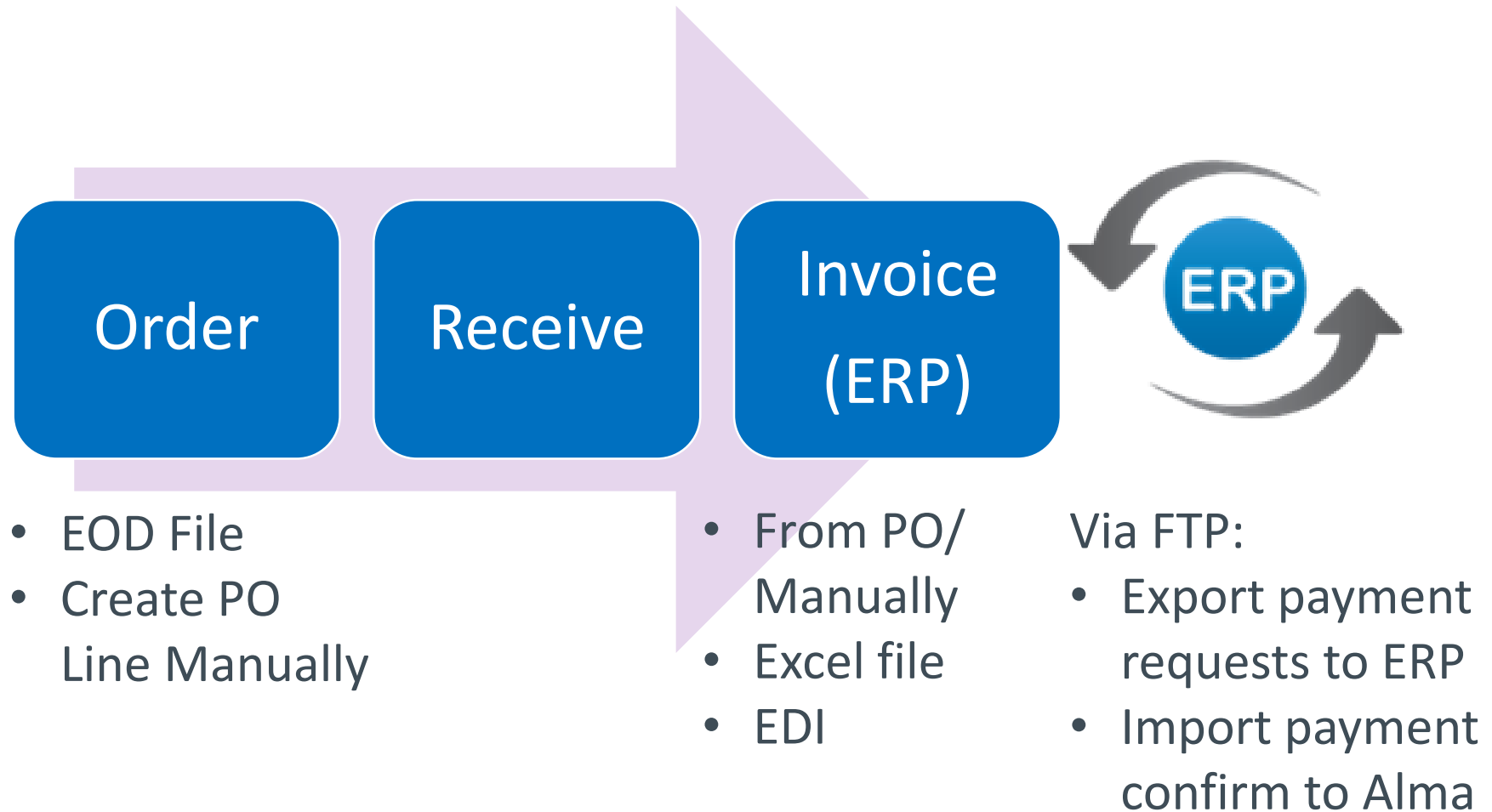
Import Payment Confirmation
Active * ☒ Active ☐ Non Active
Plugin
Input File Path invoice_in
Run
Schedule Not scheduled

Export Invoice For Payment
Active * ☒ Active ☐ Non Active
Plugin
Output File Path invoice_out
Run
Schedule Not scheduled
Use xsd format ☐

Funds Allocation Loader
Active * ☐ Active ☒ Non Active
Plugin
Input File Path
File Extensions * ☐ Csv ☒ Excel
Schedule Not scheduled
Run

3) Run Fund Allocation Loader to synchronize ERP and Alma funds

Invoice Workflow (with ERP)



Invoice Workflow : Internal Copy

Internal Copy appears *only* when Alma is set to send invoices via the ERP.

Payment

Prepaid ☐

Internal Copy ☒

Payment status

Voucher date

Voucher number

Voucher Amount*

Invoice Workflow : Prepaid Invoice (with ERP)

Invoice Details 1 2 [Back](#) [Cancel](#) [Save and Create Invoice Lines](#)

Invoice Number*	<input type="text"/>	Invoice Date*	<input type="text"/>
Total amount*	<input type="text"/> USD	Total invoice lines amount	-
Vendor*	<input type="text"/>	Vendor Account	<input type="text"/>
Vendor Contact Person	<input type="text"/>	Payment method	Accounting Department
Invoice Reference #	<input type="text"/>		

Additional Charges

Use Pro rata ☐

VAT

VAT %	<input type="text"/> 0.0	Inclusive	<input checked="" type="checkbox"/>
Amount	<input type="text"/> 0.0	Expended from fund	<input checked="" type="checkbox"/>
Vendor tax (local)	<input type="text"/>		

Payment

Prepaid ☒

Internal Copy ☐

Export to Financial Sys. ☒

Payment status	<input type="text"/> Paid	Voucher number	<input type="text"/> 54
Voucher date	<input type="text"/> 14/02/2013	Voucher Amount*	<input type="text"/> 98.95 USD

Export to Financial Sys. (ERP) available if ERP enabled in Alma configuration

Invoice Workflow – Decisions

If same staff member performs both review and approval- skip approval step.



Acquisitions Configuration > Configuration Menu > Invoice Approval Rules.

1. Edit *Default* Approval Rule (“Default Review Rule”)
2. For Output Parameters, select **False** for the result and click **Save**.
3. Disable all other approval rules (un-select yellow check mark)



Disable approval on all invoices:

1. Go to **Acquisitions Configuration > Configuration Menu** and select **Invoice Approval Rules**.
2. Find the *Default* Approval Rule (i.e., “Default Review Rule”) and click **Edit**.
3. For Output Parameters, select **False** for the result and click **Save**.
4. For all other approval rules listed, click yellow checkmark in Enabled column to disable each.

Invoice Workflow Considerations

If same staff do receiving and invoicing tasks, consider doing **receiving at the time of invoicing** to save time

ACQUISITIONS

- Purchase Order Lines**
 - Search for PO Line
 - Order Without Inventory
 - Review
 - Claim
 - Renew
 - Review Deferred
 - Manage Trials
- Purchase Order**
 - Package
 - Review
 - Approve
 - Delete PO
- Receiving and Invoicing**
 - Search for Invoice
 - Receive
 - Create Invoice**
 - Review
 - Approve
 - Waiting for Payment

Select Invoice Creation Process

Invoice Creation

- ☐ Manually
- ☒ From PO
- ☐ From File

Handle Receiving ☒



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Fulfillment Workflows



- I. Physical Items
- II. Bookings
- III. Lost Items

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Resource Management Workflows

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Summary and Resources

I. Fulfillment Workflow: Physical Item Requests

Task	Who does task	System used
1. Submit request	Patron or Library Staff	Primo or Alma
2. Print request slip	Circulation staff	Alma (<i>Pick from Shelf</i>)
3. Go to shelf/retrieve item	Circulation staff	N/A
4. Scan-in item at Circulation desk	Circulation staff	Alma (<i>Scan in Item</i>)
5. Place item on hold shelf	Circulation staff	N/A
6. Loan item to patron	Circulation staff	Alma (<i>Manage Patron Services</i>)

Fulfillment Workflow: Personal Delivery

Alma allows personal delivery of requested physical items to a user's office or home.



Create Request

Cancel Submit

Create Request

Title Update Order Automation

Institution Main Campus

Request Type* Patron physical item request

Requester* User, Super

Note

Pickup At*

Additional Request Attributes

No Campus

Education Library

Law Library

Main Library

Resource Sharing Library

Personal Delivery

Home Delivery

Office Delivery

Add Request Attributes

Material Type

User Details

Cancel Save

Name Pavarotti, Luciano Primary Identifier 48259 Record type Public

Account Type Internal User group Faculty

Manage fulfillment activities

General Information Contact Information Identifiers Notes Blocks Fines/Fees Statistics Attachments Proxy For

Addresses

Add Address

1 - 2 of 2 Records Tools

Preferred	Address	Created By	Creation Date	Type	Actions
	13 Washington Street Office 605	Bartels, Carrie	02/12/2014 13:31:43 EST	Work	Actions
✓	259 Roma Way	EX_LIBRIS	12/17/2011 14:05:48 EST	Home	Actions

Fulfillment Workflow: Personal Delivery Configuration

- Circulation Desk indication-personal delivery support
 - [Fulfillment Configuration menu > Circulation Desks](#)
Select circulation desk > edit > supports personal delivery checkbox
- Terms of Use indication-personal delivery allowed
 - [Fulfillment Configuration menu > Terms of use and policies](#)
 - filter by Request > select a Terms of use > select appropriate Personal Delivery policy from drop-down
 - Configure Personal delivery fee request policy if applicable.
- Home and/or office address required in user record
 - [Administration > Find and Manage Users](#)

II. Fulfillment Workflow : Booking Requests

- Reserves item(s) for patron for specified time frame
 - Requester knows exactly when resource is available to him/her
 - Limits amount of time item is available to requester
- Can be used for high-demand items with limited number of copies, equipment, study rooms, videos
- Can be submitted via Primo or Alma
- Requires policies, terms of use, and fulfillment unit rules for configuration

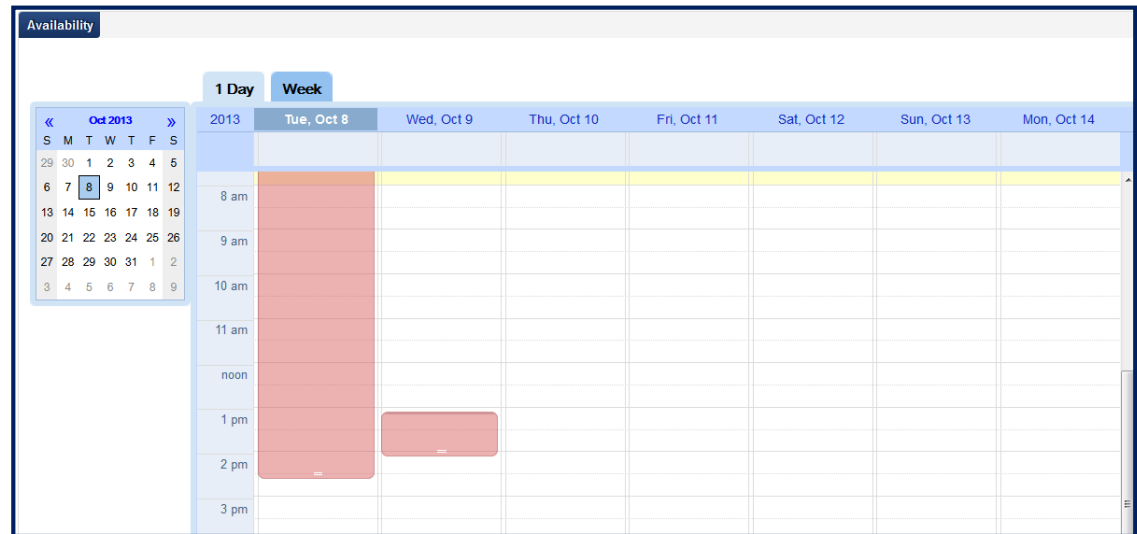
Booking Requests Workflow

Task	Who does task	System used
1. Create request	Patron or Library Staff	Primo or Alma (<i>Repository Search</i>)
2. Verify availability of item for requested time; request submitted	Alma	Alma
3. Loan item to patron at scheduled time	Circulation staff	Alma (<i>Manage Patron Services</i>)

Booking Requests: Availability

Item's availability displayed in calendar format in **Availability** section of request form in Primo:

- If multiple copies of an item: Calendar takes into account availability of all copies
- If item is on regular loan prior to booking request: Shows as unavailable during timeframe of loan





Booking Requests: Future Date

If booking request placed before *future limit* specified in policies, error message displays

Terms Of Use Booking Requests

Booking release time	30 minutes	-
Is item bookable	Item is bookable	Item is bookable
Maximum allowed booking length	3 hours max	-
Preview period	1 hour	1 hour preview period
Pickup Locations	Pickup only in owning library	Must pickup in owning library
Future limit	7 days	7 days future limit
Back to back booking	Back to Back booking - 4 hours	-

 **Create Request**

 No items available for the request due to policy.

Create Request

Title Peterson's annual guides to graduate study.

Institution Training - Sandbox

Request Type * Booking request

Requester * Brady, Marcia

Note

Start time * 10/31/2013 15:00

End time *

Pickup At *

Additional Request Attributes

No records were found.


Add Request Attributes


Material Type Refresh Values > Add Request Attribute

Availability

Booking Requests: Not Available

If booking request overlaps another booking request, message displays

 **Create Request**

 Failed to save the request: The request conflicts with other requests.

Create Request

Title Peterson's annual guides to graduate study.

Institution Training - Sandbox

Request Type * Booking request

Requester * Bartels, Carrie

Note

Start time * 10/09/2013 17:00

End time * 10/09/2013 18:00

Adjusted Start Time 10/09/2013 17:00:00 EDT

Adjusted End Time 10/09/2013 18:00:00 EDT

Pickup At * Main Library

Manage Booking Requests


Monitor Requests & Item Processes: Limit request/process type to *Booking request*

Search limited to: Request Type: **Booking request**

- Peterson's annual guides to graduate study.**
ID: 74546700000541 Requester: Brady, Marcia Queue: 1
Pickup Location: Main Library Request Date: 10/08/2013
Start time: 10/08/2013 17:45:00 EDT End time: 10/08/2013 18:30:00 EDT
[View Audit Trail](#) | [Edit Request](#) | [Cancel](#) | [Mark as missing](#)
- Art and nonart : reflections on an orange crate and a moose call /**
ID: 74541750000541 Requester: Braun, Connie Queue: 1
Pickup Location: Main Library Request Date: 10/08/2013
Call Number: N71 .E2 1983
Start time: 10/09/2013 13:00:00 EDT End time: 10/09/2013 14:00:00 EDT
[View Audit Trail](#) | [Edit Request](#) | [Cancel](#) | [Mark as missing](#)

Patron record: Requests tab

Patron Services Done

 Patron Brady, Marcia
ID 2626745
User group Undergraduate Student
Active balance 25.00 USD
[Edit Info](#) [Send Activity Report](#) [Send Return Receipt](#) [Send Loan Receipt](#)

Loans Returns **Requests**

Request Type All Task All Find: in: Title Go

1 - 1 of 1 Records Tools

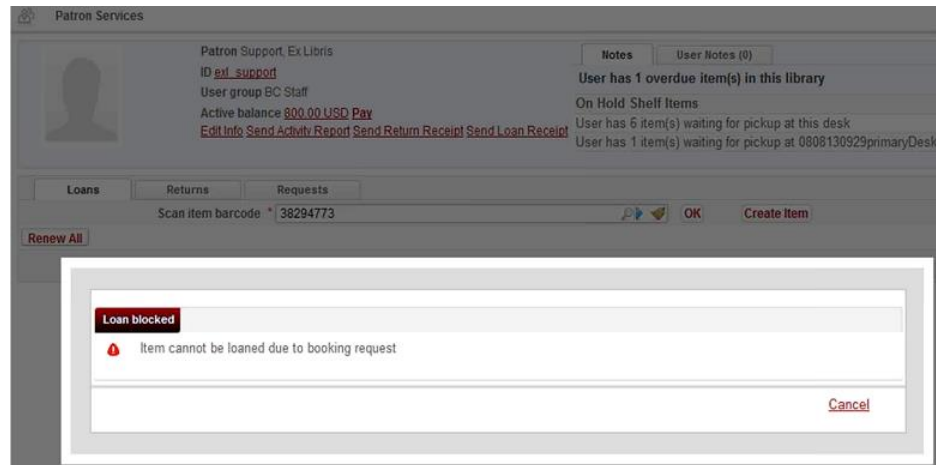
Title	Request Type	Request Date	Start Time	End Time	Expiry Date	Task	Process Date	Managed By	Queue	Resource Sharing Request	Actions
Peterson's annual guides to graduate study.	Booking request	10/08/2013	10/08/2013 17:45:00 EDT	10/08/2013 18:30:00 EDT	-	Not Started	-	-	0		Edit Request Cancel

Done

Loan Attempt During Booked Time

Regular loans for item will be blocked during booked timeframe:

- Loan attempt *during* booked timeframe:
 - *Item cannot be loaned due to booking request*



- Loan attempt *before* booking request time starts:
 - *The loan conflicts with a book request and the due date must be shortened*

Booking Request Configuration

Fulfillment > Fulfillment Configuration > Configuration Menu > Advanced Policy Configuration

Create **policies** for booking requests:


- Back-to-back booking
- Booking release time
- Future limit
- Is item bookable
- Maximum allowed booking length
- Preview period
- Pickup locations

The screenshot displays the ExLibris Alma Sandbox interface. At the top, the header includes the ExLibris logo, 'Alma Sandbox', a search bar, and 'Tasks' and 'An' links. Below the header, the main section is titled 'Select Fulfillment Policy Type'. A sub-header indicates 'You are configuring: Training - Sandbox'. A 'Choose Policy Type' button is visible. A list of policy options is shown, each with a radio button. The first option, 'Allow Resource Sharing Requesting', is selected and marked with a red asterisk. The list includes: Allow Resource Sharing Requesting, Back to back booking, Booking release time, Cancelled Recall Due Date, Card Renewal Fee, Closed Library Due Date Management, Direct Delivery Fee Fee (Under Construction), Due Date, Expiration Alert Period, Expiration Date Management (Under Construction), Future limit, Grace Period, Hold Shelf Period, Is Digitizeable, Is Loanable, Is Recallable, Is Renewable, Is Requestable, Is Requestable for Resource Sharing, and Is item bookable.

Booking Request Configuration: Terms of Use

Create booking terms of use to invoke configured booking policies:

Fulfillment > Fulfillment Configuration > Configuration Menu > Terms of Use and Policies

 **Select Fulfillment Terms of Use Type**

You are configuring: Training - Sandbox

Choose Terms of Use Type

☒ Booking


☐ Borrowing Request

☐ Lending Request

☐ Loan

☐ Request

☐ User Registration

 **Terms of Use Details**

You are configuring: Training - Sandbox

Terms of Use Details

Name *


Booking Requests

Description

Booking release time	30 minutes
Is item bookable	Item is bookable (Item is bookable)
Maximum allowed booking length	3 hours max
Preview period	1 hour (1 hour preview period)
Pickup Locations	Pickup only in owning library (Must pickup in owning library)
Future limit	7 days (7 days future limit)
Back to back booking	Back to Back booking - 4 hours

Booking Request Configuration: Fulfillment Units

Create rules that indicate which Booking TOU should be applied for specified fulfillment unit location(s)

 **Edit Fulfillment Unit** Cancel Save

You are configuring: Training - Sandbox

Fulfillment Unit Details Fulfillment Unit Locations Fulfillment Unit Rules

Fulfillment Unit


Code Short

Name Short Loan/Reserve


Loan/Reserve

Rule Type

Booking

Filter All 

Add Rule Tools

Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
			Booking requests - course reserves	-	Booking Requests	Implementer, Ex Libris	10/08/2013	Action

Default Rule

[Default booking rule](#)Default booking rule[Edit](#)

Booking Request Configuration: Set Request Limit

Number of permitted booking requests can be limited by patron type

Fulfillment Configuration Menu > Patron Configurations > **Patron Limits**

Mapping Table

Cancel

Save

You are configuring: Training - Sandbox

Organization Unit List

Table Information

Sub System

FULFILLMENT

Table Name

PatronLimits

Updated By

svetlana.smirnov

Last Updated

09/10/2013

Table Description

Patron Limits Definitions

Mapping Table Rows

Tools

Enabled	User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls	Updated By	Last Updated	
	Undergraduate Student	100	10	2	1	svetlana.smirnov	09/10/2013	Delete
	Graduate Student	100	10	2	1	svetlana.smirnov	09/10/2013	Delete
	Consortium Member	100	10	2	1	svetlana.smirnov	09/10/2013	Delete
	Part-time	100	10	2	1	svetlana.smirnov	09/10/2013	Delete
	Faculty	250	25	5	1	svetlana.smirnov	09/10/2013	Delete
	Academic Staff	250	25	3	1	exl_impl	09/10/2013	Delete
	Alumni	25	3	1	1	exl_impl	09/10/2013	Delete
	Guest	25	3	1	1	exl_impl	09/10/2013	Delete
	Staff	250	25	3	1	exl_impl	09/10/2013	Delete

III. Lost Loans Workflows



Mark Item as Lost:

- [Fulfillment > Manage Patron Services > \[user record\] > Title > Actions > Lost](#)

Advanced Search for All Lost Items:

- Physical Items where Physical items (Process type equals "Lost")

The screenshot shows the Alma Advanced Search interface. At the top, there is a 'Find' dropdown menu with 'Physical items' selected. Below this is an 'Add conditions' button. Underneath, the search criteria are displayed: 'Physical items' followed by a search icon, 'Find', 'Process type', 'Equals', and 'Lost'.

Lost items cannot be requested (by default in Alma)

Exclude lost items from repository search

- [Resource Configuration > Configuration Menu > Exclude Process Types from Publishing](#)

Configure Lost Loans Parameters:

- Add Lost Loan Fines, Replacement Fee, or Lost Item Replacement Fee Refund Ratio

Close Lost Loans

1. Create Lost Loan Fulfillment Set to display list of items Lost before a specific date:
 - i. [Fulfillment > Advanced Tools > Manage Fulfillment Sets](#)
 - ii. [Configure Loan status = Lost](#)
2. Run the **Close Lost Loans** process:
[Administration > Manage Jobs and Sets > Run a Job > Close lost loans](#)



Deal with a lost loan item:

1. Mark a user's loan as lost.
2. Create a set of all lost items
3. Run the Close Lost Loans process

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Resource Management Workflows



- I. Edit CZ Records
- II. Imports

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Summary and Resources

I. Edit Community Zone Records

- Community Cataloging standard defined at:
<http://www.exlibrisgroup.com/files/Products/Alma/AlmaCommunityCatalogCatalogingStandardsPolicies.pdf>
- Ability to add/contribute electronic portfolios and collections.
- Catalogers, Catalog Managers, and Catalog Administrators can edit CZ records.



Edit CZ Records

- From Community Zone repository search, click Edit for record you wish to edit.

Repository Search

Find where contains

Limit results to:

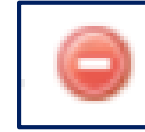
[Collection](#)
[Electronic title](#)
[Digital title](#)
[Physical title](#)

[Book \(431\)](#)

1 **Sports medicine**
Journal (Mairangi Bay, Auckland, N
ISSN: 0112-1642
Subject: Sports medicine Periodicals.
Availability: Electronic version at AdisO
Electronic version at Ingent
Electronic version at EBSCO
and others
[Order](#) | [Portfolio List](#) | [Edit](#)

Working on -Sports medicine (99954925-
LDR 07584nas##2200865#a#4500

001 99954925469303
005 20121022185230.0
006 m#####o##d#####
007 cr#mnu
008 970922c19849999nz#mr#pso##
010 \$\$a 2008233865
- 022 \$\$a 0112-1642
- 022 \$\$e 1179-2035
035 \$\$a (OCoLC)37663896



Note that the 022 field is not editable:

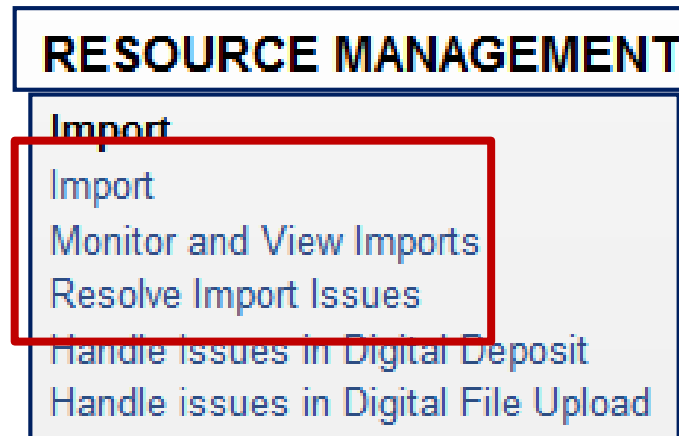
- Edits to 022 field can currently affect the link resolution that is dependent on the 022 field; restriction to be removed in a future release.

Save and release the record when editing is completed.

- Changes to CZ records is automatically reflected
- Validation using the CZ MD Registry, validation routines, and normalized routines.

II. Imports and Handling Issues

- Once import profiles are configured, run imports from:
 - Import Profile (Actions > Run Import) *or*
 - Resource Management > **Import**
- **Monitor and View Imports** to check if job ran successfully
- Use **Resolve Import Issues** to view records that failed and see specific issues



Resolve Import Issues

- **Matching Issues:** Imported record matches an existing record in the database
- **Validation Issues:** Imported records have invalid data per Validation Exception in import profile
 - e.g., mandatory fields missing, LDR missing, multiple occurrences of non-repeatable fields
 - Validation exception profiles: [Resource Management Configuration menu > Metadata Configuration > MARC21 Bibliographic > Validation Exception Profile List](#)
- **Errors:** Indicates something unexpected has happened which cannot be resolved
 - e.g., problems with file data not related to matching or validation of records



Agenda

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Introduction

2

Acquisitions Workflows

3

Fulfillment Workflows

4

Resource Management Workflows

5

Summary and Resources

Summary

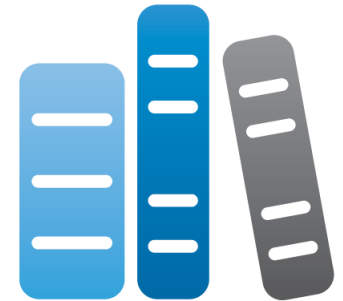
During this session, you learned how to:

- Conduct workflows within various functional areas of Alma
- Edit configurations that can impact workflows
- Apply best practices to workflows at your own institution



Available as online help in Alma or the [Ex Libris Knowledge Center](#):

- Alma Acquisitions Guide
- Integrating with External Systems Guide
- EDI Standard Supported in Alma
- Alma Resource Management Guide
- Alma Fulfillment Guide
- Alma Developers (in Alma Administration menu)



Additional support resources within the ExLibris Ecosystem:

- [Idea Exchange](#)
- System Status Pages: [Single Tenant ENV](#) / [Multi-Tenant ENV](#)
- [Developer Network](#)

[Technical Seminar Presentations](#)

(located in the Cross-Product section of the Ex Libris Knowledge Center)

Please enter the following link into your browser:

<https://www.surveymonkey.com/r/techsem2017>



Thank you!

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