

## April 2016 Release Notes

Alma April 2016 Release:  
**Great Inventions  
Around the Alma World**  
Great Britain – Joseph Fry  
The chocolate bar



The Alma April release provides numerous new features and enhancements. Some of these enhancements are a result of the NERS or Idea Exchange initiatives.



[Download a PDF of the Release Notes](#) - Note that the PDF includes the online help pages that describe the core functionality of the new features.

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## Make the Most of This Release

### Action Items

[Patron Purchase Requests](#) - Do you want your patrons to be able to request an item for purchase? If so, you can enable this feature for Primo users to submit a request. Even when not enabled in Primo, a librarian can enter purchase requests manually. An Alma user with the Selector role can view and edit the request, email a requester for more information, and approve or reject the request.

[Authority Control Task List](#) - Finding it hard to monitor changes to bibliographic headings performed by the authority control process? With the new Authority Control Task List, you can now monitor the changes in an efficient manner and perform changes to headings when manual intervention is needed.

[Control Global Authorities Displayed/Accessed in the MD Editor](#) - Is your MD Editor navigation pane cluttered with Community Zone global authority vocabularies that you are not using? You can now define which authority vocabularies can be viewed and/or accessed in the MD Editor.

[Expanding Booking Requests' Workflow](#) - Are your patrons using booking requests to reserve resources for a predetermined period of time? Were you interested in implementing this service but wanted more options included in it? Now you can implement a richer workflow with booking requests, including full pick up from shelf and hold shelf management options.

[Broker Notification for a Renew Request](#) and [Receive Renew Status Update from Broker](#) - If you are using a Relais system as your broker resource sharing system, you can now enjoy a fully integrated renew process with Alma. New NCIP-based features enable you to set up a fully integrated renew request process, from the time the patron requests a renewal until the lender approval is received.

[Automatic Rejection of New Lending Requests that Cannot be Fulfilled](#) - If you are a resource sharing lender and want to focus on fulfilling requests rather than on rejecting requests that cannot be fulfilled, this is what you've been waiting for. With this feature, you can set Alma to automatically reject any new lending request that cannot be fulfilled (for example, none of its inventory is available).

### What's new in each Alma functional area for the April 2016 Alma release?

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## Acquisitions

- [Patron Purchase Requests](#) - This new feature enables librarians using Alma and patrons using Primo to request that a library purchase an item.



[Watch the Patron Purchase Requests video](#)

- [Additional Invoice Charges](#) - You can now configure additional special invoice line types and add up to five of these line types to invoices.



[Watch the Additional Invoice Charges video](#)

- [Encumbrances Recalculated According to Current Exchange Rates](#) - Open encumbrances and disencumbrances based on PO lines with different currencies than their associated funds are now calculated according to the correct exchange rates.
- [Additional Acquisitions Enhancements](#)

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## Resource Management

- [Browsing Bibliographic Headings](#) - Alma now supports browse functionality for authors, subjects, series, and titles from within the MD Editor.
- [Authority Control Task List](#) - The new Authority Control Task List enables you to review authority control issues and manually handle headings corrections such as splits, ambiguous headings, and date period closures.



[Watch the Authority Control Task List video](#)

- [Control Global Authorities Displayed/Accessed in the MD Editor](#) - Support is now provided for controlling which global authorities can be viewed and/or accessed in the MD Editor.
- [Authority Control Based on Multiple Authority Identifiers in a Bibliographic Record](#) - With new Metadata Configuration options, you can identify how you want the system to handle matching and linking bibliographic to authority records when there are multiple authority identifiers in the bibliographic record.
- [Multilingual Authority Record Preferred Term Support](#) - Alma now supports authority control based on authority vocabularies that contain multilingual preferred terms in one authority record.



[Watch the Multilingual Authority Record Support video](#)

- [Electronic Resource Editing Improvements](#) - Several improvements to the electronic resource editors have been made with a focus on better visualization of group settings for different levels of electronic resources.



[Watch the E-Resource Editing Improvements video](#)



- [KORMARC Non-Filing Indication](#) - When working with KORMARC records, searching in the Alma repository and browsing headings has been enhanced to include logic for processing records with non-filing indicators and characters.

- [Enhance Primo Publishing of MARC Bibliographic Records to Include Linked Data URIs](#) - URIs may now be added to bibliographic information for Primo publishing. This enhancement requires Primo-side configuration that is available in Primo starting from the Primo May release.
  - [Additional Resource Management Enhancements](#)
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## Digital Resource Management

- [Enhancements for Handling of Special Representations](#)
    - Configuring Representation Label Templates - You can now configure a template that can be used to create a label for partial representations.
    - Auto Generate Labels - After you configure a representation label template, you can click the **Auto-Generate Label** button when editing a partial representation to create a label based on the template.
    - Sorting and Find Options Available for Multiple Representations List - You can sort and search a list of multiple representations.
  - [Additional Digital Resource Management Enhancements](#)
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## Fulfillment

- [Expanding Booking Requests' Workflow](#) - Booking requests now participate in the standard request workflows.  
 [Watch the Booking Requests' Workflow video](#)
- [Support for RFID Readers](#) - Scanning items with RFID readers is now supported.  
 [Watch the Support for RFID Readers video](#)
- [Sorting Citations in the Reading List](#) - New sorting options are now available for the citations in a reading list.
- [Filter Get It Holdings and Items by Library Based on Primo View](#) - Library mapping allows Primo views to be mapped to one or more Alma libraries to offer an initial view with only the mapped libraries.
- [Enhancements for Resource Locate](#) - A number of enhancements were added to the resource locate process for citations on the Edit Reading List page.
- [Additional Fulfillment Enhancements](#)

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## Resource Sharing

- [Disabling Borrowing Reject Action](#) - Libraries may now configure the borrower's ability to use the Reject action.
- [Automatic Rejection of New Lending Requests that Cannot be Fulfilled](#) - Alma now automatically rejects a lending request when the request cannot be fulfilled, or when the associated move request is canceled, which alleviates the need for an operator to manually reject the request.
- [Broker Notification for a Renew Request](#) - For Relais ILL and Relais D2D broker systems, Alma now notifies the broker when an item renewal is requested by sending a RenewItem message to the broker with item information and a desired due date.
- [Receive Renew Status Update from Broker](#) - A broker system may notify Alma about the status of the renew request.
- [New Fields in Resource Sharing Requests](#) - Other Standard ID, DOI, Remote Record ID, and Barcode fields have been added for resource sharing.
- [Add Contact Pop-up for Resource Sharing Partners](#) - When a scanned item's next step is to ship to a resource sharing partner, the partner's name shows in the Scan In, Shipping Items, or Return interfaces, and the link for the contact pop-up is now displayed.
- [Additional Resource Sharing Enhancements](#)

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## Collaborative Networks

- [Integrating with the Aleph Central Catalog](#) - Alma now supports the integration of Alma institutions with the Aleph Central Catalog.

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## Analytics

- [Owning Location Code and Owning Location Name Added to Requests](#) - The Owning Location Code and Owning Location Name fields have been added to the Owning Library dimension of the Requests subject area.
- [Level of Service and Copyright Status Added to Borrowing Requests](#) - The Level of Service and Copyright Status fields have been added to the Borrowing Requests Details dimension of the Borrowing Requests subject area.
- [Block Expiration Date and Block Expiration Date and Time Added to Users](#) - The Block Expiration Date and Block Expiration Date and Time fields have been added to the Block dimensions of the Users subject area.
- [Fine Fee Additional Transaction ID Added to Fines and Fees](#) - The Fine Fee Additional Transaction ID field has been added to the Fines and Fees Transactions dimension of the Fines and Fees subject area.

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**NOTE:** Due to an upgrade of the OBIEE used by Alma Analytics, the export option for reports from Alma Analytics to Excel 2003 will no longer be supported as of the Alma May release. Only export to an xlsx format will be supported and not export to an xls format.

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## Alma Infrastructure and Usability

- You can view the hidden columns (**Actions > View Hidden**) for a row in a table. For details, see [Customizing List Tables](#).



[Watch the Show Hidden Columns video](#)



- **A NERS Enhancement:** The maximum number of lines that can be exported to Excel was increased to 100,000.
- Right to left alignment (for Hebrew/Arabic letters) is now supported for most fields in Alma. Right to left support is also available whenever a Hebrew or Arabic character appears in the MD Editor.
- A new privilege **REGISTER\_NEW\_USER** was added to several roles, including Circulation Desk Manager, Circulation Desk Operator, Circulation Desk Operator - Limited, General System Administrator, Repository Manager, Trial Manager, Trial Operator, User Administrator, and User Manager. This privilege is required to add new users.
- Resource Management Usability Enhancements (see the Resource Management section above for more information):
  - User Information Details Provided in the MD Editor
  - Electronic Resource Editing Improvements
  - Control Global Authorities Displayed/Accessed in the MD Editor
- Fulfillment Usability Enhancements (see the Fulfillment section above for more information):
  - Expanding Booking Requests' Workflow
  - Sorting Citations in the Reading List
- Resource Sharing Enhancement (see Resource Sharing section above): Automatic Rejection of a Lending Request After a Move Request Cancellation

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## Alma APIs

- Alma API usage continues to grow as customers provide innovative services to their users. After careful review of usage reports in recent months, we've increased the concurrent API request threshold to 25 API calls per institution per second. The concurrent API request threshold applies to all API requests to the Ex Libris API gateways.

As part of our continuing efforts to enable and encourage creative use of the APIs while ensuring the Alma platform runs smoothly for all customers, API requests exceeding this threshold will receive an error message starting 1 July 2016. To help plan for this change, requests exceeding the threshold during the interim period will be marked with a warning message. It is recommended that you review your API applications in the coming months to ensure that your integrations are not receiving these warning/error messages. For more information, see <https://developers.exlibrisgroup.com/alma/apis#concurrent-threshold>

- Support for digital representations was added to the Request for Services OpenURL API. Alma now returns `<key id="available_services">viewit</key>` for bibliographic records that have only digital inventory. For detailed information, see [https://developers.exlibrisgroup.com/alma/integrations/discovery/services\\_page](https://developers.exlibrisgroup.com/alma/integrations/discovery/services_page).
- The tracking ID for an error was removed from the error message and placed in a separate property, as follows:

```
{
  "errorsExist":true,
  "errorList":{
    "error":[
      {
        "errorCode":"401690",
        "errorMessage":"Barcode is illegal.",
        "trackingId":"E01-1910124003-ETEJZ-AWAE585113571"
      }
    ]
  },
  "result":null
}
```

- Running `GET /bibs/{mms_id in the Network Zone}` on the Network Zone now retrieves an aggregate list of AVE fields from all member institutions, including a subfield with the the member institution's `mms_id`. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- The Create Bib API can now create bibliographic records in UNIMARC and KORMARC, in addition to MARC 21. For detailed information on this API, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.
- The `<renewable>` field was removed by default from `GET /users/ID/loans`, as it was causing system lag. If you require this field, set the new Fulfillment parameter `temp_add_renewable_to_get_loans_rest` to `true` (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**).

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## Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 \$a and 327 \$b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 \$a or the 327 \$b.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- When creating an OCLC Connexion import profile in a Network Zone member institution with the **Use NZ** option selected, the **Use NZ record** option is used upon finding a match. Currently, there is no possibility to select the **Merge**, **Overlay**, or **Do not import** options instead.
- When a record is deleted in Alma, the headings associated with the record are still available when browsing bibliographic headings.
- The **Total electronic portfolios imported** count in the MD import report does not take into account the portfolios imported in the first file that is imported when the import is split into several files.

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## Data Services

- Library of Congress Genre/Form Terms thesaurus records were added to the Alma Community Zone. The records will be updated weekly when updates are available. The following is an example of the way in which you should link to the authority record:

```
Title: Survivor: Thailand.  
655 #7 $a Survival television programs. $2 lcgft  
655 #7 $a Nonfiction television programs. $2 lcgft
```

- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- No new external search resources were added for this release

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## Acquisitions - April 2016 Enhancements

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### Patron Purchase Requests

Patron purchase requests is a feature that enables librarians using Alma and patrons using Primo to request that a library purchase an item. When enabled for display in Primo, a Primo user can request an item for any reason, for example:

- The library does not have a copy.
- The library does not have enough copies or in the right format or edition.
- The existing copy is damaged.

A librarian can enter a user's purchase request in Alma, even when the feature is not enabled in Primo. An Alma user with the Selector role (Selectors) can view the list of requests and assign them to a Selector. Selectors can edit a request, email a requester for more information, and approve or reject requests. Approved requests become purchase order lines.

For detailed information, see [Patron Purchase Requests](#).

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### Additional Invoice Charges

Until now, the special invoice lines **Shipment**, **Insurance**, **Overhead**, and **Discount** automatically appeared for each new invoice, and you could add additional lines of these types, as well as lines of type **Other** or **Regular**.

An administrator can now configure additional special invoice line types and then add up to five of these line types to invoices. For the list of types and how to configure them, see [Configuring Invoice Line Types](#).

To configure line types, you must enable the **invoice\_split\_additional\_charges** parameter on the Acquisitions customer parameters page. Note that this parameter also affects how additional charges are handled in incoming EDI invoices. For more information about both of these issues, see the [invoice\\_split\\_additional\\_charges](#) parameter.

After configuring additional line types, an invoice operator or invoice manager can add invoice lines of these types when creating or editing an invoice.

For example, if the administrator enabled **Sleeving** as a line type, **Sleeving** appears as an option in the **PO Line** dropdown box Add Invoice Dialog Box (click **Add Invoice Line** on the **Invoice Lines** tab of the Invoice Details page). The operator can then add **Sleeving** as an invoice line type.

Add Invoice Dialog Box

**To add the new additional charges to invoices:**

1. While creating or editing an invoice, click **Add Invoice Line** in the **Invoice Lines** tab of the Invoice Details page. The Add Invoice Line dialog box appears.
2. Select the line type from the **Type** drop down list. In this example, **Sleeving** is selected as the line type.
3. Enter any other required information, and click **Add and Close**. The line appears in the list of invoice lines.

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Not	PO Line #	Actions
1	Sleeving	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions
2	999991 Shipment	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions
3	999992 Discount	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions
4	999993 Overhead	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions
5	999994 Insurance	0.00 USD	0.00 USD	-	In-Review	-	-	-	-	Actions

Invoice Details, Invoice Lines Tab

You can add up to five special invoice line types in each invoice. Alternately, the operator can add additional charges using pro rata over all invoice lines.

**To add the new additional charges pro rata over all invoice lines:**

1. While creating or editing an invoice, click **Use Pro Rata** on the **Summary** tab of the Invoice Details page. The additional charges fields appear.

The screenshot shows the 'Invoice Details' page, 'Summary' tab. The 'Additional Charges' section is expanded, showing a 'Use Pro Rata' checkbox checked. Below it, there are fields for 'Shipment amount' (10.0), 'Insurance amount', 'Additional Charge' (Sleeving), and 'Amount' (10.0). The 'Additional Charges total amount' is 20.00 USD. Other fields include 'Invoice Number' (12346), 'Vendor' (0-3), 'Invoice Date' (01/06/2016), and 'Total amount' (100.00 USD). The 'VAT' section shows 'VAT %' (0.0) and 'VAT Type' (Inclusive). The 'Payment' section has a 'Prepaid' checkbox.

**Invoice Details, Summary Tab**

2. Select the type from the **Additional Charge** dropdown and enter the value in the **Amount** field. If you have enabled multiple additional line types, each time you select one of the line types from the **Additional Charge** drop down list, another **Additional Charge** drop down appears, up to the total number of additional line types that are enabled or until you have added five types of additional charges.
3. Make any other required changes and click **Save** or **Save and Continue**.

For more information on creating or editing invoice lines, see [Creating Invoices](#).

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## Encumbrances Recalculated According to Current Exchange Rates

Open encumbrances and disencumbrances based on PO lines with different currencies than their associated funds are now calculated according to the correct exchange rates. The exchange rate and date of open encumbrances is updated by a job every week; the exchange rates and dates of their associated disencumbrances are always the same as the encumbrances.

For detailed information and an example, see [Managing Funds and Ledgers](#). The new job is **Recalculate PO Line Encumbrances Based on Current Exchange Rates**; see [Viewing Scheduled Jobs](#).

## Additional Acquisitions Enhancements

- Alma configuration is now available only on the institution level.
- The **Owner** field was added to the top of the Invoice Details page.

The screenshot shows the 'Invoice Details' page. At the top, there are fields for 'Invoice Number' (12346), 'Unique Invoice Identifier' (151286620000301), 'Owner' (Biology Library (BIO)), and 'Vendor' (AAA). The 'Owner' field is highlighted with a red box. Below these fields are tabs for 'Summary', 'Alerts', 'Invoice Lines', 'History', 'Notes', and 'Attachments'. The 'Invoice Lines' tab is active, showing a table with one line item. The table has columns for Line #, Type, Price, Total Price, VAT Note, Status, Description, Funds, and Note/PO Line #. The first line item is '1 1 Regular 100.00 USD 100.00 USD - Ready - AutoFundAlloc\_0111...'. At the bottom right, there are 'Cancel', 'Save', and 'Save and Continue' buttons.

### Invoice Details Page - Invoice Lines Tab

- When attaching a PO line to an invoice line, the PO line owner appears in the list of PO lines and the list is restricted to PO lines relevant to the invoice owner.

The screenshot shows the 'Select PO Line' page. At the top, there are 'Filter' and 'Find' fields. The 'Find' field contains 'AAA' and the 'in' dropdown is set to 'Vendor code'. Below the search bar, there are three PO line entries. The second entry is highlighted, and its 'PO Line Owner' field is highlighted in red. The entries are:

- Melvil Dewey, by Fremont Rider., Chicago., American Library Association, 1944., American library pioneers; Emily M. Danton, editor. VI, 44004322
- Science., American Association for the Advancement of Science [etc.], v. 1-23, Feb. 9, 1883-Mar. 23, 1894; new ser., v. 1- (no. 1-); Jan. 4, 1895-, 17024346 //r54, ISSN
- Science., American Association for the Advancement of Science [etc.], v. 1-23, Feb. 9, 1883-Mar. 23, 1894; new ser., v. 1- (no. 1-); Jan. 4, 1895-, 17024346 //r54, ISSN

At the bottom right, there are 'Cancel' and 'Select' buttons.

### Invoice Details Page - Invoice Lines Tab

- When an EDI invoice is loaded, if all of the associated PO lines of an invoice are owned by a particular library, the invoice is also now owned by the library. Otherwise, the invoice is owned by the institution.

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## Resource Management - April 2016 Enhancements

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### Browsing Bibliographic Headings

Alma now supports browse functionality for authors, subjects, series, and titles from within the MD Editor. Subject searching also supports the option to choose a vocabulary, such as **Library of Congress Subject Headings** or **Medical Subject Headings**, and a source code (for example, **Genre/Form**)

For detailed information about browsing bibliographic headings, see [Browsing Bibliographic Headings](#).

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**NOTE:** Browsing by call number will be available in a future release.

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### Authority Control Task List

The Authority Control Task List provides more details regarding authority record updates and authority control processes that are relevant to the institution's bibliographic record headings. The Authority Control Task List makes it easier to manage cataloging maintenance tasks. Specifically, this list highlights authority headings updates that require manual intervention.

For detailed information, see [Using the Authority Control Task List](#).

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### Control Global Authorities Displayed/Accessed in the MD Editor

With the April release, support is provided for controlling which global authorities can be viewed and/or accessed in the MD Editor. Metadata configuration options in Resource Management have been enhanced to allow you to tailor the display of authority options when working in the MD Editor. With this new capability, you can limit the display of options to only the vocabularies that you commonly use as opposed to all that might be available. These same Metadata Configuration options also tailor the list of available **Vocabulary code** options that appear in the drop-down list on the Import Profile Details page for an Authority type of profile.

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**NOTE:** This capability is specific to institutions that have had their authority usage policy configured for local authorities.

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For detailed information, see [Controlling the Display and Access of Global Authorities in the MD Editor](#) located on the [Configuring Cataloging](#) page.

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## Authority Control Based on Multiple Authority Identifiers in a Bibliographic Record

With new Metadata Configuration options, you can identify how you want the system to handle matching and linking bibliographic to authority records when there are multiple authority identifiers in the bibliographic record.

For detailed information, see [Authority Control Based on Multiple Authority Identifiers in a Bibliographic Record](#) on the [Working with Authority Records](#) page.

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**NOTE:** After the Alma April 2016 release, GND customers affected by this change will be contacted individually to implement this new improvement.

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## Multilingual Authority Record Preferred Term Support

With a new option available in the Metadata Configuration, you can configure the system to handle preferred term support for multilingual authority records.

For detailed information, see [Working with Multilingual Authority Record Preferred Terms](#) on the [Working with Authority Records](#) page.

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## KORMARC Non-Filing Indication

When working with KORMARC records, searching in the Alma repository and browsing headings has been enhanced to include logic for processing records with non-filing indicators and characters. Sorted results lists ignore non-filing characters and when browsing headings, the non-filing characters are ignored. For example, articles such as a, an, and the can be ignored.

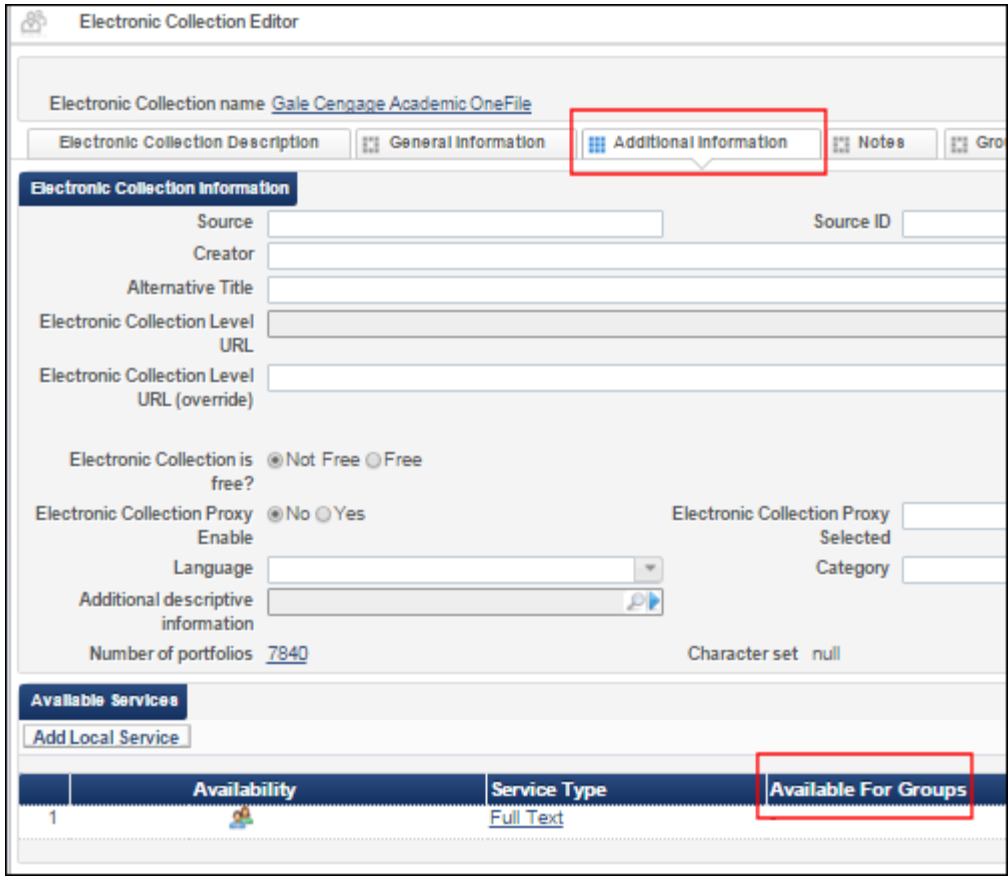
For detailed information, see [Using Non-Filing Indicators in KORMARC](#) located on [Navigating the MD Editor Page](#).

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## Electronic Resource Editing Improvements

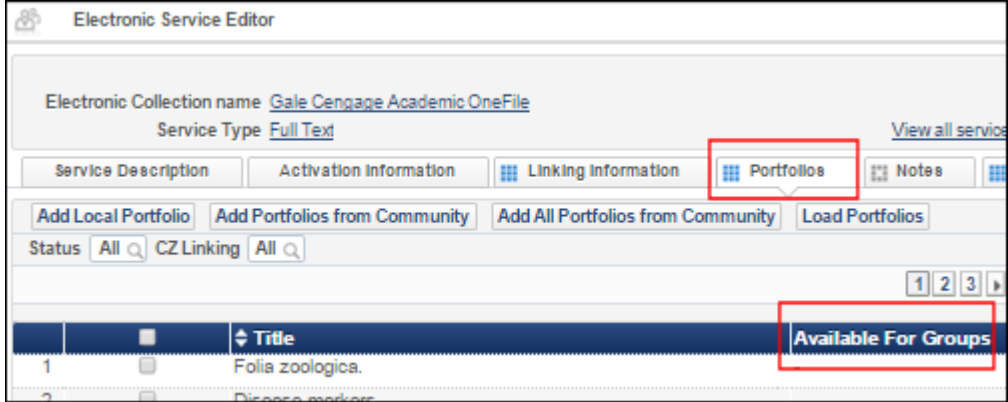
Several improvements to the electronic resource editors have been made with a focus on better visualization of group settings for different levels of electronic resources. The following list highlights the changes that have been made:

- For consortial and multicampus environments, a new column labeled **Available For Groups** has been added to the Available Services section of the Additional Information tab on the Electronic Collection Editor page.



**Available For Groups Column – Additional Information Tab**

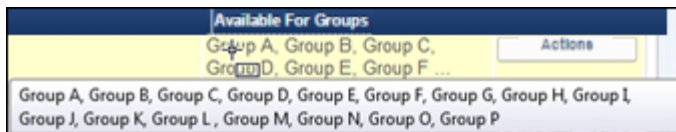
- For consortial and multicampus environments, a new column labeled **Available For Groups** has been added to the Portfolios tab on the Electronic Service Editor page.



**Available For Groups Column - Portfolios Tab**

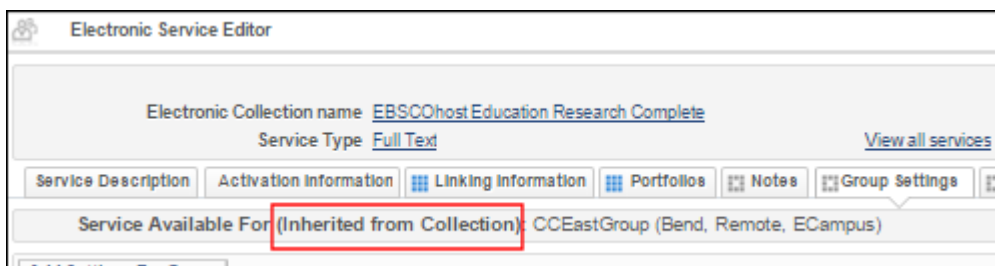
If the list of group names displayed in a row under the **Available For Groups** column requires more than two lines to display all of the groups, an ellipsis is added at the end of the content that can be displayed in those

two lines and the complete list can be displayed as a tooltip when you position your cursor in the two lines that are displayed.

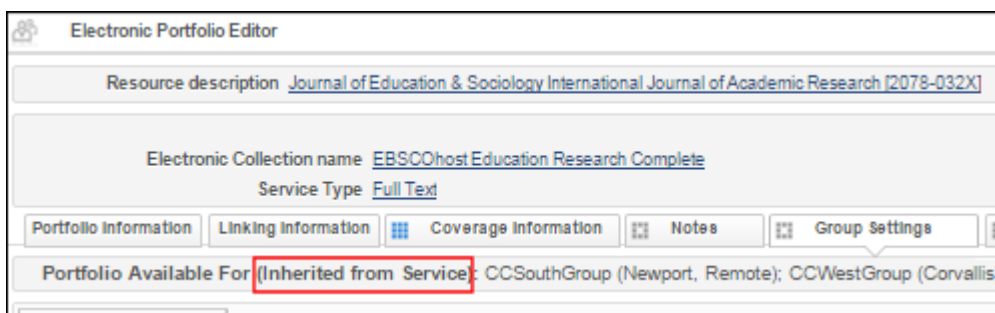


### Available For Groups Tooltip Display

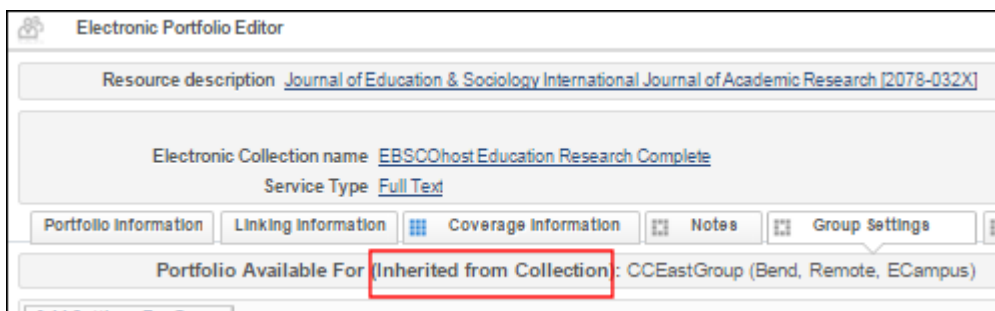
- For consortial and multicampus environments, group inheritance information from the collection and the service is provided in the Group Settings tab on the Electronic Service Editor page and the Electronic Portfolio Editor page, respectively. When there is a group setting for the collection and no group setting for the service, the collection-level group setting displays in the Group Settings tab on the Electronic Portfolio Editor page. If you add a group setting to a resource that has inherited group settings, a tooltip warning appears.



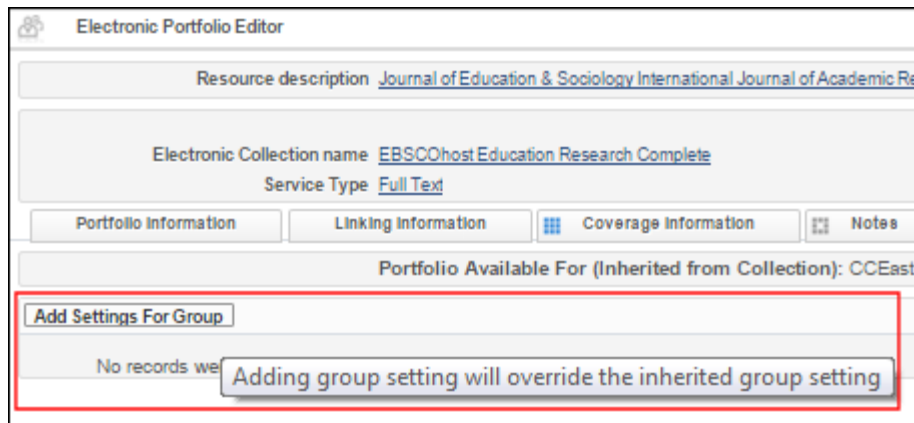
### Group Settings Inherited from the Collection on the Service Editor Page



### Group Settings Inherited from the Service

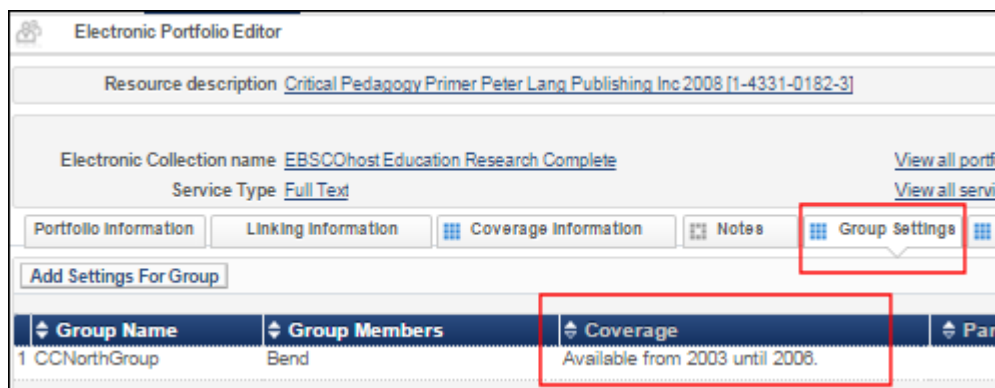


## Group Settings Inherited from the Collection on the Portfolio Editor Page

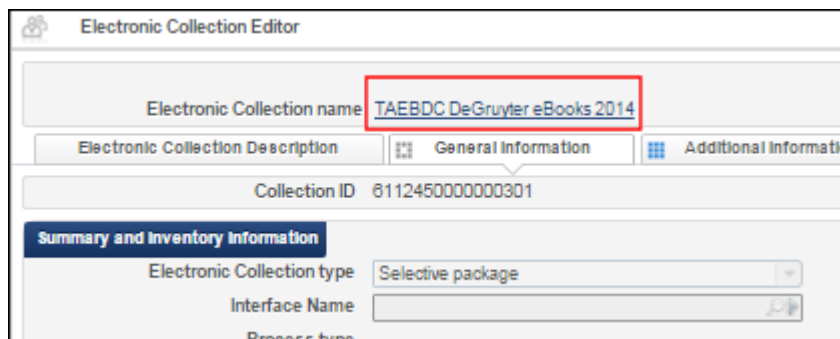


### Tooltip Warning When Inherited Group Settings Exist

- From the Group Settings tab on the Electronic Portfolio Editor page, the Coverage column now displays the details of the coverage information specified for the group.

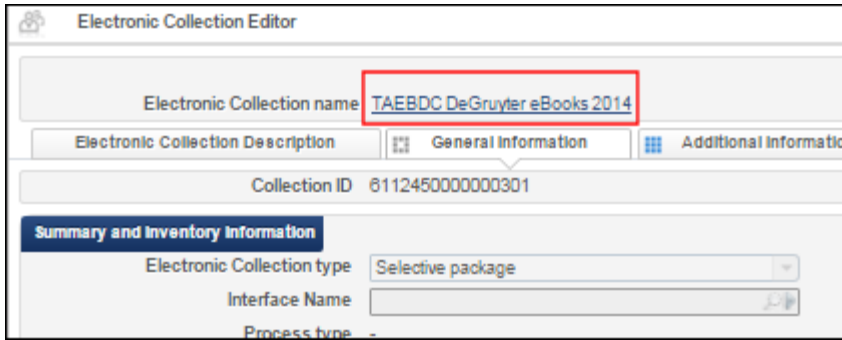


### Coverage Details in the Group Settings Tab on the Electronic Portfolio Editor Page

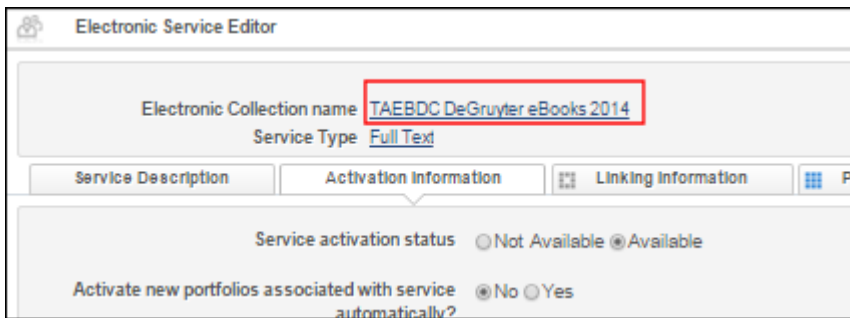


### Group Settings Coverage Details Entered

- The electronic collection name is now hyperlinked text in the header area of the Electronic Collection Editor page and the Electronic Service Editor page.



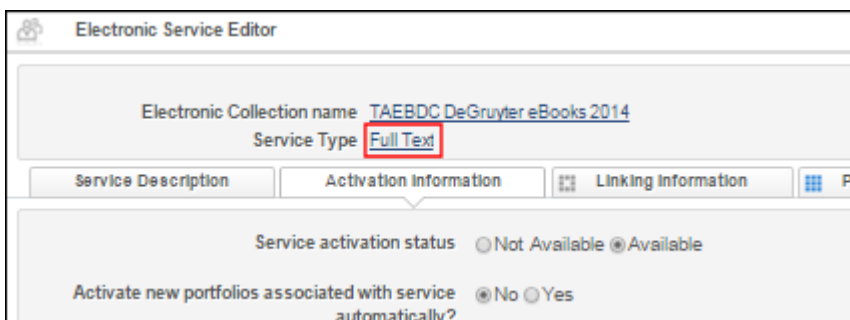
**Electronic Collection Editor Hyperlinked Name**



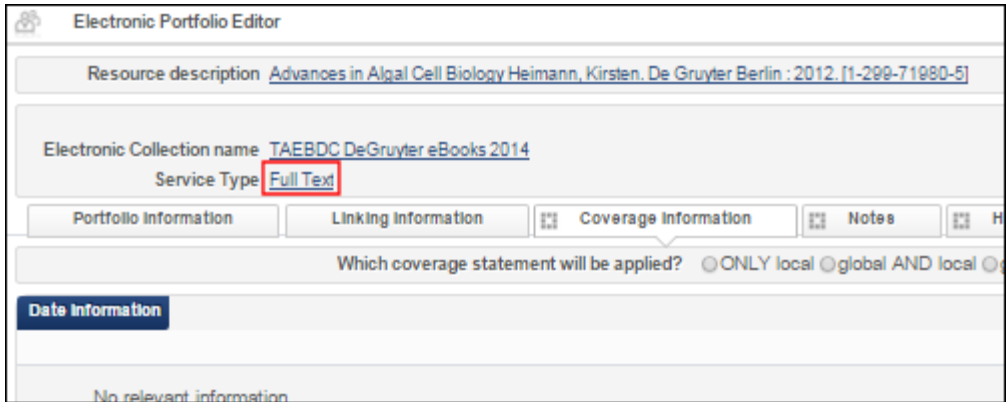
**Electronic Service Editor Hyperlinked Name**

When you use the hyperlink to move about and make changes from tab to tab, your changes are maintained but they are not permanently saved until you click the **Save** button in either the Electronic Collection Editor or the Electronic Service Editor.

- The service type is now hyperlinked text in the header area of the Electronic Service Editor and the Electronic Portfolio Editor page.

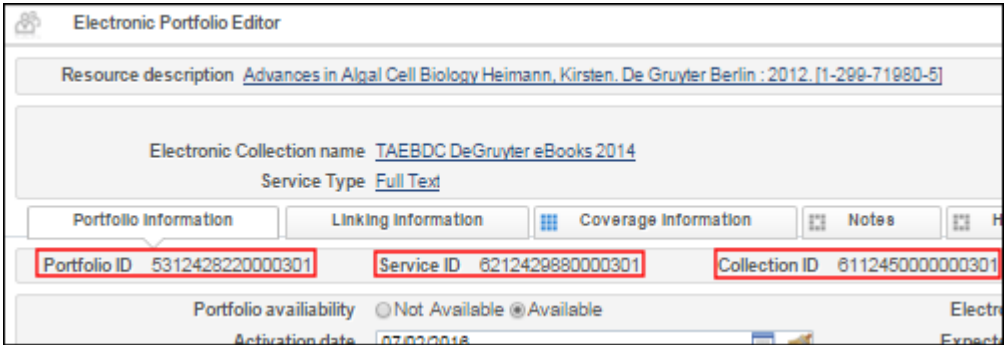


**Electronic Service Editor Hyperlinked Service Type**



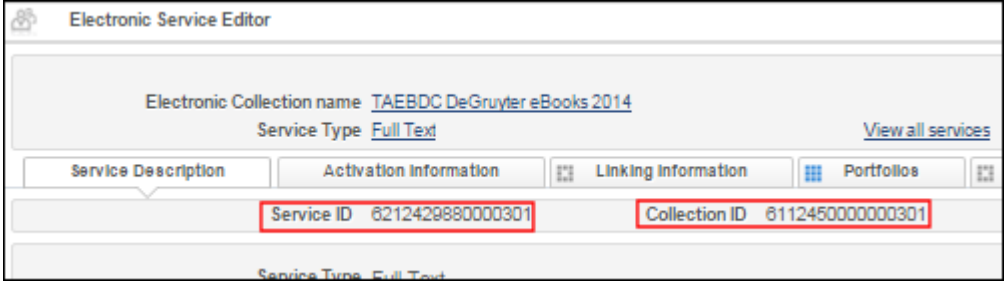
**Electronic Portfolio Editor Hyperlinked Service Type**

- From the electronic resource editor pages, the record ID for electronic resources has been added for information purposes in the following manner:
  - The portfolio record ID, service record ID, and electronic collection record ID appear in the Portfolio tab on the Electronic Portfolio Editor page.



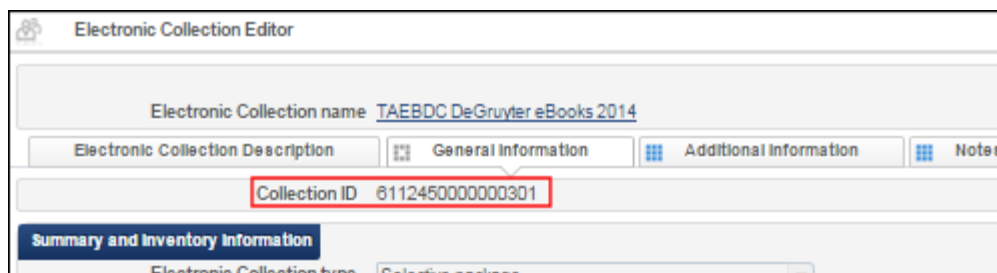
**Electronic Resource Record IDs in the Portfolio Information Tab on the Electronic Portfolio Editor Page**

- The service record ID and electronic collection record ID appear in the Service Description tab on the Electronic Service Editor page.



**Electronic Resource Record IDs in the Service Description Tab on the Electronic Service Editor Page**

- The electronic collection record ID appears in the General Information tab on the Electronic Collection Editor page.



Electronic Resource Record ID in the General Information Tab on the Electronic Collection Editor Page

## Enhance Primo Publishing of MARC Bibliographic Records to Include Linked Data URIs

Primo publishing may now include URIs in addition to the regular bibliographic information. The URIs are entered in the 0 subfield of the relevant fields.

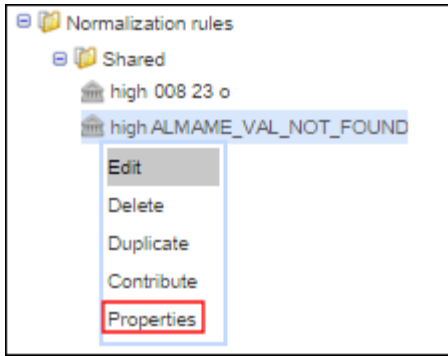
A sample of the enriched record follows:

```
700 1 |a Lockyer, Norman, |c Sir, |d 1836-1920.
      |0 (uri) http://id.loc.gov/authorities/names/n86860325
      |0 (uri) http://viaf.org/viaf/sourceID/LC/n86860325
650 0 |a Science |v Periodicals.
      |0 (uri) http://id.loc.gov/authorities/subjects/sh85118580
```

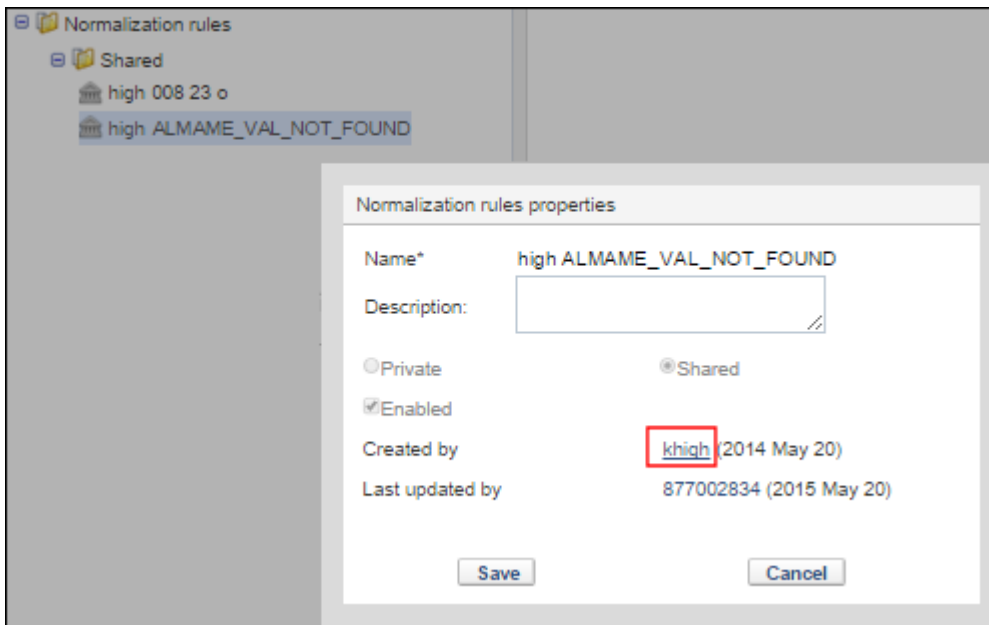
For information on configuring linked data enrichment, see [http://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Alma-Primo\\_Integration/Publishing\\_Alma\\_Data\\_to\\_Primo/Exporting\\_Alma\\_Records\\_to\\_Primo#ww1352217](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration/Publishing_Alma_Data_to_Primo/Exporting_Alma_Records_to_Primo#ww1352217)

## Additional Resource Management Enhancements

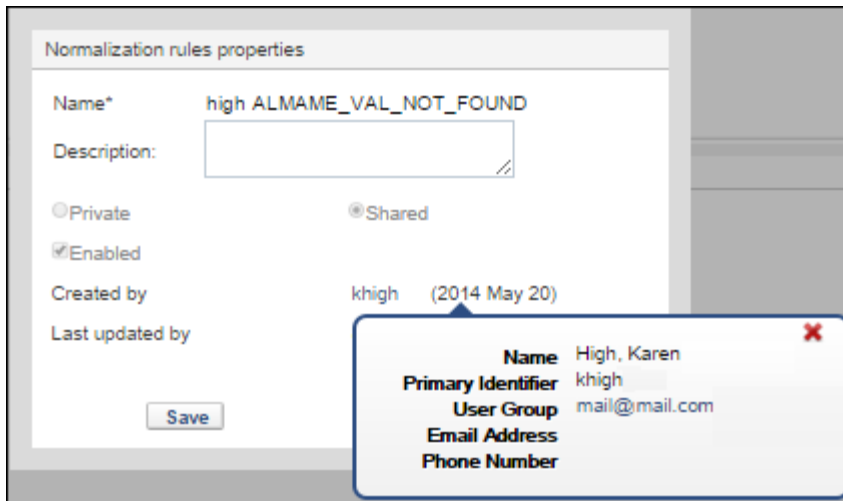
- User information details displayed in a pop-up window have been added to the Templates tab and the Rules tab in the MD Editor. Specifically, this has been added for Created by and Last updated by user information. When you view the properties for templates or normalization, merge, or indication rules and click the user ID link, the user information details appear. See the illustrations below.



**Properties Option**



**User ID Link**



### User Information Pop-Up

The user information link to display the user pop-up window is active for rules (or templates) that have been locally created in the Shared or Private folders. For rules (or templates) obtained from the Community, no user pop-up link is provided.

- With the March release of Alma, sharing rules (normalization, merge, and indication in the MD Editor) in the Community Zone was introduced. In April, several enhancements have been incorporated into this capability, such as filtering and a **Properties** option in the drop-down list of the Community folder. For more information about these enhancements that have been added, see [Contributing to the Community Zone - Normalization, Merge, and Indication Rules](#).



[Watch the Contributing Normalization Rules to the Community Zone video](#)

- In order to start maintaining URLs in the Community Zone, the ability to locally override the URL value of an activated Community Zone collection has been added. URLs will be added to the Community Zone collections in upcoming releases.
- A new drool **combineFields** can be used to combine all fields of the specified number. All subfields of the second and subsequent lines will be combined into the first line unless excluded (only the first occurrences of excluded subfields are copied into the first line, and only if they don't already exist in the first line). For more information, see [Working with Normalization Rules](#).

---

## Fulfillment - April 2016 Enhancements

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### Expanding Booking Requests' Workflow

The workflow for booking requests was expanded to include steps for picking up booked items from the shelf, for putting them in transit to the required pickup location, and for placing them on the hold shelf. This greatly expands the booking services a library can offer to its patrons.

For detailed information about the booking requests' workflow, see [Booking Workflow](#).

---

### Support for RFID Readers

Alma now supports using 3M RFID readers (model 896) for scanning items and for their check-in and check-out.

For detailed information about RFID and the integration profile setup, see [RFID Support](#).

---

### Sorting Citations in the Reading List

You now sort citations in a reading list using the new **reading\_list\_citation\_sorting** configuration parameter with one of the following values: **Title**, **Author**, **Call Number**, and **Create Date**. The default sort is by title. If you select call number, and the citation contains more than one call number, only the first number is considered.

---

**NOTE:** Items that start with special characters (i.e. “, (, ), \$, etc.) affect the sorting. These items appear at the top of the listing.

---

For information about configuring citation sorting, see the Other Settings Options table in [Configuring Fulfillment Jobs](#).

---

### Filter Get It Holdings and Items by Library based on Primo View

Primo views of the GetIt tab may now be mapped to one or more Alma libraries. When this is configured, the initial GetIt tab view is filtered to view only libraries which have been mapped to the Primo view. A message indicates that a filter is in place and includes the option to switch back to a view showing all libraries. If there is no such configuration, the filter text does not appear.

Thomas More,  
Christopher Hollis 1902-1977. c1934  
● Click Find it in Library for availability TML Stacks (DA334.M8 H6 )

Find it in Library Locations Details Reviews & Tags Virtual Browse

QAC01\_01BC\_INST Sign-in for more options Actions

Request Options: [Interlibrary Loan](#) | [Scanned Book Chapter](#) | [Scanned Journal Article](#) |

This view may be filtered. [Click here to unfilter](#)

Location	Availability	Location Map
Law Archives No Loan More DA334.M8 H64 1934	(2 copies, 2 available, 0 requests)	
Theology and Ministry Library Stacks DA334.M8 H6	(2 copies, 2 available, 0 requests)	
Law General Collection DA334.M8 H64 1934	(1 copy, 1 available, 0 requests)	<a href="#">Locate</a>

[Back to results list](#) Result 1

### Primo Filtered View

For information on mapping a Primo view to Alma libraries, see [Mapping Primo Views to Libraries](#).

## Enhancements for Resource Locate

A number of enhancements were added to the resource locate process for citations on the Edit Reading List page.

- When you create a citation that is not attached to an inventory item, or when you click **Resource Locate** beneath a citation that is not attached to an inventory item, Alma tries to find a single inventory item to which to attach the citation. If it succeeds, the citation is automatically attached to the inventory item. This matching is controlled in the new Match by Fields code table. The search automatically uses the tag "suppressed=false" to avoid returning suppressed items.
- When there are multiple matches, Alma now displays a repository search page enabling you to select a match or edit the search criteria
- When there are no matches, Alma now displays a repository search page enabling you to edit the search criteria.

For more information, see [Managing Citations](#).

## Additional Fulfillment Enhancements

- Click **Purchase Request** beneath a citation on the [Edit Reading List page](#) to add a patron purchase request for the citation. For more information, see [Patron Purchase Requests](#).

The screenshot displays the 'Edit Reading List' interface. At the top, there are navigation buttons: Back, Print Slip, Being Prepared, Change Status, Print Slip Report, Place Request, Remove Alerts, Remove Citations, Change Copyright Status, and Save. Course details include Course Code: ART 212, Section: -, Course Name: Neoclassicism to Impressionism, Processing: Course Unit, Instructors: -, Number of participants: 0, and Department: .

**Reading List Information**

Code: \* 1005  
Name: \* ART 212  
Owners: -  
Status: Complete  
Due Back Date: 01/27/2013

Alerts: All Citation/Locate Status All Citation Type All

Buttons: Add Repository Citation, Add Non-Repository Citation, Add Brief, Tools

Select All

1  [Nineteenth-century European art / Petra ten-Doesschate Chu, Book \(Book - Physical\)](#) By Chu, Petra ten-Doesschate. (Upper Saddle River, NJ : Pearson Prentice Hall c2012.) ISBN: 9780205707997 (pbk. : alk. paper) and others  
Subject: Art, European 19th century.  
Availability: Physical version at sa: sar; N6757 .C484 2012q (2 copies, 2 available)  
Physical version at sa: sa; N6757 .C484 2012q  
Physical version at sa: sa; N6757 .C484 2012q  
Request Status: Complete  
Resource Locate Status: Resource Located  
Copyrights Status: Not Determined  
Edit | Resource Locate | Set Complete | Manage Fulfillment Options | **Purchase Request** | Items | Remove | Duplicate | Print Slip | Detach from Repository | Citation Details | More Info

Bottom navigation: Back, Print Slip, Being Prepared, Change Status, Print Slip Report, Place Request, Remove Alerts, Remove Citations, Change Copyright Status, Save

### Edit Reading List Page

- You can now associate a reading list with a course (or remove the association) from the Reading List Task List page.

Reading Lists Task List

Assigned to Me Unassigned Assigned to Others

Status All Alerts All Find: in: All Go

1 2 3 Go 1 - 20 of 373 Records Columns Tools

Code	Name	Status	Assignee	Owner/s	Alerts	Actions
1 COMD 7379	Seminar in Autism	Complete	-	-		Actions
2 Df14seeger	ECON 6344	Being Prepared	-	-		View
3 f13alexander3	EPPS 6346	Being Prepared	-	-		Work On
4 f13berardi	BA 1100	Being Prepared	-	-		View in Leganto
5 f13birch	CRIM 3301	Being Prepared	-	-		Reassign
6 f13bortz	ACCT 3332	Being Prepared	-	-		Duplicate
7 f13bradbury	MIS 6378	Being Prepared	-	-		Delete
8 f13brikowski2	f13brikowski2	Being Prepared	-	-		Associate this list with a course Remove associated course
9 f13brussolo2	OPRE 3333	Being Prepared	-	-		Actions
10 f13bunte	POEC 6301	Being Prepared	-	-		Actions
11 f13chabal	f13 chabal	Being Prepared	-	-		Actions
12 f13cogan	MATH 1306	Being Prepared	-	-		Actions
13 f13_cooper	CS 6301	Being Prepared	-	-		Actions
14 f13defrias	PSY 4386	Being Prepared	-	-		Actions
15 f13farmer	HIST 3312	Being Prepared	-	-		Actions
16 f13files	ACCT 3331	Being Prepared	-	-		Actions
17 f13files2	ACCT 6330	Being Prepared	-	-		Actions
18 F13gans	F13gans	Being Prepared	-	-		Actions
19 f13goodrich1	ACCT 6203	Being Prepared	-	-		Actions
20 f13gossin	LIT 3311	Being Prepared	-	-		Actions

1 2 3 Go 1 - 20 of 373 Records Tools

### Reading List Task List Page

To associate a reading list with a course, or to change the reading list's course association, select **Actions > Associate this list with a course**, select or search for the new course in the pop-up window, and click **Change Course Association**.

This Reading List is Associated with course COMD 7379

Course \*

### Course Association Pane

To remove a course association, select **Actions > Remove associated course**.

- The tab-separated file to be read by the course loader integration profile can now end in `.txt` as well as `.csv` (the format of the file has not changed).
- Request fields for partial digitization requests are now displayed in the **Notes** field on Manage In Process Items and Approval Request List pages.

### Approval Requests List

- The user information pop-up was added to the Loan Audit Trail page for:
  - Borrower
  - Requester Name (for recalled loans)
  - Operator
- The new user parameter, **hide\_single\_holding\_getit\_details** controls the Get It display when a single holdings' items are shown. The parameter, when set to `True`, opens the single holdings' items page with the details hidden, with an option to show details. The default is `False`, which opens the page with the holdings' item already expanded.
- In the Change Item Information tab of the scan-in Interface, a new value, **None**, was added to the **Item policy** drop-down list. Selecting **None** removes the value previously selected.
- The Personal Delivery pickup options labels in the Get It tab can now be customized in **Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Labels**. The labels are:
  - **personal\_delivery**
  - **personal\_delivery.home\_address**
  - **personal\_delivery.work\_address**
- For cases in which an item was marked as missing and is then scanned in, a pop-up confirmation message was added to notify the operator that the missing label was removed from this item. The message appears in the following interfaces:
  - Scan In Items
  - Manage Item Returns
  - Manage Patron Services - Returns tab



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## Resource Sharing - April 2016 Enhancements

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### Disabling Borrowing Reject Action

The borrower's ability to use the Reject action for borrowing requests may now be configured by the library. This is particularly useful for ISO requests, where the rejection is expected to be received as a message sent by the lender.

This function introduces a new workflow option, Reject, which is turned on by default. When a workflow profile is selected and the workflow step is disabled, the Reject action disappears from the borrowing request and from the Rota tab of the request. The option still exists in the list of actions in the drop-down list at the top of the borrowing requests. If the reject action is selected from the list, the reject action is not executed and an alert appears at the top of the list. If a workflow profile is not selected, the Reject action is enabled. If the request does not have a partner, the reject option is unavailable.

To configure the workflow option, see the Workflow Profile Steps table in [Adding Workflow Profiles](#).

---

### Automatic Rejection of New Lending Requests that Cannot be Fulfilled

Lending requests for ISO partners can now be automatically rejected if the request cannot be fulfilled. This may also be relevant for SLNP and NCIP P2P partners. The new options for automatic rejection are:

- Reject a request when the locate process did not find any matches
- Reject a request when there are no items that are available in place and requestable for resource sharing, per policy
- Reject a request when only an electronic resource is available

To configure the resource sharing library for these new options, see [Configuring Libraries](#).

Alma now also automatically rejects a lending request when the associated move request is canceled, which alleviates the need for an operator to manually reject the request. No configuration is necessary. If there is more than one partner on a borrowing request and the partners are of type ISO, once the move request has been canceled and the lending request rejected, the borrowing request moves on to the next partner. If there are no further partners, the borrowing request status is set to **Rejected by partner**.

The lending request and borrowing request both contain notes to indicate when an automatic rejection has occurred.

Resource Sharing Lending Request				
General Information				
Find : <input type="text"/> in : Created by <input type="text"/> <a href="#">Go</a> <a href="#">Advanced Search</a>				
1 - 3 of 3 Records Columns <input type="text"/> <a href="#">Tools</a>				
	Created On	Updated On	Updated By	Note
1	12/16/2015	12/16/2015	exl_impl	[GFOX_RES_SHARE] Unfilled reason: Other
2	12/16/2015	12/16/2015	exl_impl	Locate failed - automatically rejected lending request
3	12/16/2015	12/16/2015	exl_impl	[Reject][GFOX_RES_SHARE] Note:Request cannot be fulfilled

### Lending Request Notes After an Automatic Rejection

Notes				
General Information				
Find : <input type="text"/> in : Created by <input type="text"/> <a href="#">Go</a> <a href="#">Advanced Search</a>				
1 - 2 of 2 Records Columns <input type="text"/> <a href="#">Tools</a>				
	Created On	Updated On	Updated By	Note
1	12/16/2015	12/16/2015	System	[GFOX_RES_SHARE] Unfilled reason: Other
2	12/16/2015	12/16/2015	System	[Reject][GFOX_RES_SHARE] Note:Request cannot be fulfilled

### Borrowing Request Notes After an Automatic Rejection

This enhancement is applicable only for ISO, SLNP, NCIP P2P, and email partners. Other partners are not affected.

## Broker Notification for a Renew Request

For Relais ILL and Relais D2D broker systems, Alma will now notify the broker when an item renewal is requested by sending a RenewItem message to the broker with item information and a desired due date. The broker responds with a pending status and possibly a DateOfExpectedReply. This means that a fully integrated process is now possible when using a Relais system with Alma. The patron (from Primo) or the staff (from Alma) can request a renewal without that renewal request requiring re-entering into the Relais system. Instead, the Relais system is automatically updated by the RenewItem message sent from Alma.

The partner record now contains a URL to indicate where the message is sent. This must be entered in order to send the notifications to the broker system.

To configure the resource sharing partner, see [Resource Sharing Requests](#).

---

## Receive Renew Status Update from Broker

A broker system may notify Alma about the status of the renew request. Alma then receives an NCIP **CirculationStatusUpdated** message with a circulation status of:

- **Renew Still Pending** - Marks the request as **Renew Requested**.
- **Item Not Renewed** - Manages the request as it does when a renew request is rejected.

These messages have been implemented by the Relais systems. Together with the 'Broker Notification for Renew Request' feature, Alma now supports a fully integrated renew workflow with the Relais system.

For more information on NCIP messages, see the developer network: [https://developers.exlibrisgroup.com/alma/integrations/resource\\_sharing/broker/ncip](https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker/ncip)

---

## New Fields in Resource Sharing Requests

**Other Standard ID**, **Remote Record ID** and **Barcode** fields were added to the Alma lending and borrowing request forms. The fields were not added to the Primo forms.

**Other Standard ID**, **DOI**, **Remote Record ID** and **Barcode** were added to the **Locate By** field options of the Locate Profile.

For more information on the locate by process, see [Locating Items](#).

---

## Add Contact Pop-up for Resource Sharing Partners

When a scanned item's next step is to ship to a resource sharing partner, the partner's name shows in the Scan In, Shipping Items, or Return interfaces. The link for the contact pop-up is now displayed, containing the partner's emails and address. For the address to show in the pop-up, the partner must have an address with the address type of Shipping.

Scan In Items Exit

Scan in Items    Change Item Information

**Scan in Items**

Automatically print slip  Yes  No

Register in-house use

Scan item barcode\*

Scan request ID

Columns ▾

Activat	Title	Destination	Barcode	Request/Proce Type	Requeste ID	Requeste ID	Place in Queue	Checked In	Partner	
1	✓ Planet earth /	System - Auto_Partner_Defa... Request 66446	66446	-	-	-	0		Auto_Partner_Default_NCIP	<input type="button" value="Actions"/>

Exit

**Scan In Items**

Shipping Items Cancel

**Shipping Items**

Ship to 1802131125\_NCIP

Automatically print slip  Yes  No

Shipping format  Physical  Digital  Physical non-returnable

Shipping cost  USD

Internal note

Note to partner

Complete the request

Scan request ID AutoExternalID1802131204

No records were found.

Cancel

**Shipping Items**

Return

Return to Alma University

Internal note

Note to partner

Cancel Ok

Returns

---

## Additional Resource Sharing Enhancements

- **ILL SBN** has been added as an option for **System type** when selecting the **ISO** profile type.
- A new customer parameter, **rs\_external\_id\_prefix**, was created to configure the external identifier format. Possible values are `code` or `id`. If set to `code`, the external ID is created as {institution code + a generated number} (as it has been up until now). If set to `id`, the external ID is created as {customer Id + institution id + a generated number}.

---

## Digital Resource Management - April 2016 Enhancements

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### Configuring Representation Label Templates

You can create a template that can be used to create a label for partial representations. These representations are used when a bibliographic record is not fully represented by a single representation. For detailed information about creating such templates, see [Configuring Representation Label Templates](#).

---


### Auto-Generate Labels

After you configure a representation label template, you can click the **Auto-Generate Label** button when editing a partial representation to create a label based on the template. For more information, see [Editing Representation Metadata and Content](#).

---

### Sorting and Find Options Available for Multiple Representations List

When clicking **View It** and **More...** for a bibliographic record with multiple representations, the complete list of representations appears with sort and find options. For example:



Multiple representations on bib  
2014

Sort results by  Find  in

6-16, 1995 available at: [DigiTool Repository](#)  
Accessible to All

8-9, 1988 available at: [DigiTool Repository](#)  
Accessible to All

11-9, 1988 available at: [DigiTool Repository](#)  
Accessible to All

10-8, 1987 available at: [DigiTool Repository](#)  
Accessible to All

7-1, 1980 available at: [DigiTool Repository](#)  
Accessible to All

#### Sort and Find for Multiple Representations List

You can sort the results by:

- Volume
- Issue
- Date

For more information, see [Viewing Digital Representations](#).

---

## Additional Digital Resource Management Enhancements

- Various issues associated with the creation and editing of Dublin Core records in the MD Editor were fixed. Additionally, documentation has been added describing how to create Dublin Core records in the MD Editor. [to be added within the next few days]
- It is now possible to remove the Dublin Core options from the MD Editor. For more information, contact Ex Libris Support.



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## Collaborative Networks - April 2016 Enhancements

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### Integrating with the Aleph Central Catalog

Alma supports the use of the Aleph Central Catalog to allow Alma institutions to perform the following functions:

- Copy cataloging from the central catalog
- Contribute changes to the central catalog from Alma
- Publish inventory to the central catalog from Alma
- Import changes from the central catalog to Alma

For detailed information, see [Integration of the Aleph Central Catalog](#).

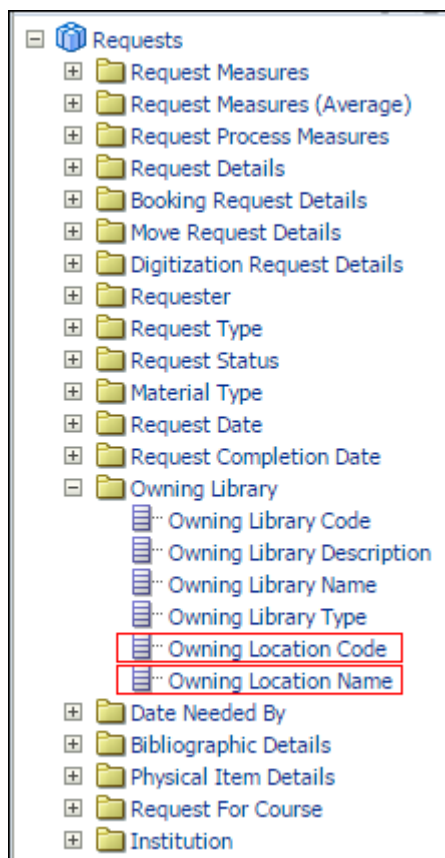
---

## Analytics - April 2016 Enhancements

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### Owning Location Code and Owning Location Name Added to Requests

The **Owning Location Code** and **Owning Location Name** fields have been added to the Owning Library dimension of the Requests subject area. These fields allow you to create Analytics reports according to the location of the requested item—for example, the number of patron physical item requests from an offsite location during a specified request date period.



#### Owning Location Code and Owning Location Name Fields

The following is an example of a report using the new fields:

# of requests	Owning Library Code	Owning Library Name	Owning Location Code	Owning Location Name
5	RES_SHARE	Resource Sharing Library	IN_RS_REQ	Lending Resource Sharing Requests
1			OUT_RS_REQ	Borrowing Resource Sharing Requests
112			SShort3	Summit 3 Short
4,612			Slong3	Summit 3 Long
1,112			illong	ILL Long Loan
67			slong	Summit Long Loan
4			sshort	Summit Short
18			art	Art Library
291	ardsk	Desk		
2	arfol	Horizontal Folios		
77	armed	Media		
9	arovr	Oversize		
50	arref	Reference		
1	arres	Reserve Desk		
2	arstr	Reserve in Stacks		
19,729	arstx	Stacks		
3	arwkm	Workroom		

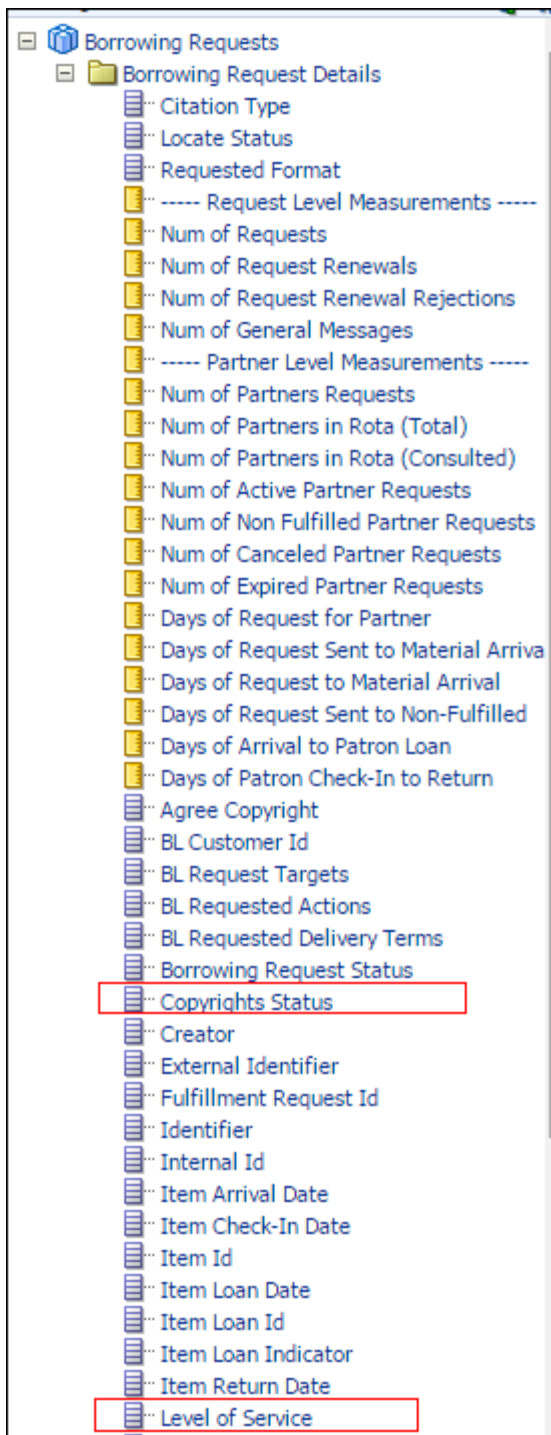
#### Owning Location Code and Owning Location Name Fields Report

For more information, see [Owning Library](#).

## Level of Service and Copyright Status Added to Borrowing Requests

The following fields have been added to the Borrowing Requests Details dimension of the Borrowing Requests subject area.

- **Level of Service** - Allows you to create reports with the borrowing request level of service, to more deeply analyze the nature and workflow of the borrowing request.
- **Copyright Status** - Allows you to filter reports by copyright status to display which requests have a copyright that may need further processing.



### Copyright Status and Level of Service Fields

The following is an example of a report using the **Copyright Status** field:

Num of Req	Copyrights Status	Requested Format	Borrowing Creation Year
1	Copyright approved	Digital	2016
2	Copyright not approved	Digital	2016
1	No copyrights restriction	Digital	2016
213	None	Digital	2015
44			2016
19,410		Physical	2013
40,938			2014
53,956			2015
8,800	2016		

#### Copyright Status Field Report

The following is an example of a report using the **Level of Service** field:

Borrowing Creation Year	Level of Service	Num of Requests
2013	None	19,410
2014	None	40,938
2015	None	54,169
2016	Express (Local)	1
	None	8,838
	Normal (Full)	2
	Normal (Local)	2
	Priority (Extended)	2
	Rush (Extended)	1
	Rush (Local)	1
	When Convenient	1

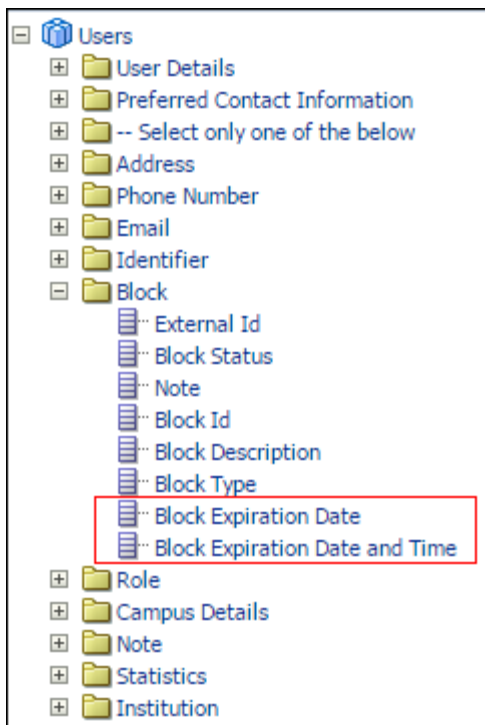
#### Level of Service Field Report

For more information, see [Borrowing Request Details](#).

---

## Block Expiration Date and Block Expiration Date and Time Added to Users

The **Block Expiration Date** and **Block Expiration Date and Time** fields have been added to the Block dimension of the Users subject area. These fields allow you to create reports according to the block expiration date and the block expiration date and time.



#### Block Expiration Date and Block Expiration Date and Time Fields

The following is an example of a report using the new fields:

User Id	First Name	Last Name	Block Expiration Date ▲▼	Block Expiration Date and Time
7164301850001452	STEPHANIE	ARAIZA	1/30/2014	1/30/2014 3:33:21 PM
9295786330001452	Kevin	Barker	1/12/2015	1/12/2015 2:57:45 PM
7180579580001452	Iden	Ferdos	1/29/2015	1/29/2015 11:01:29 AM

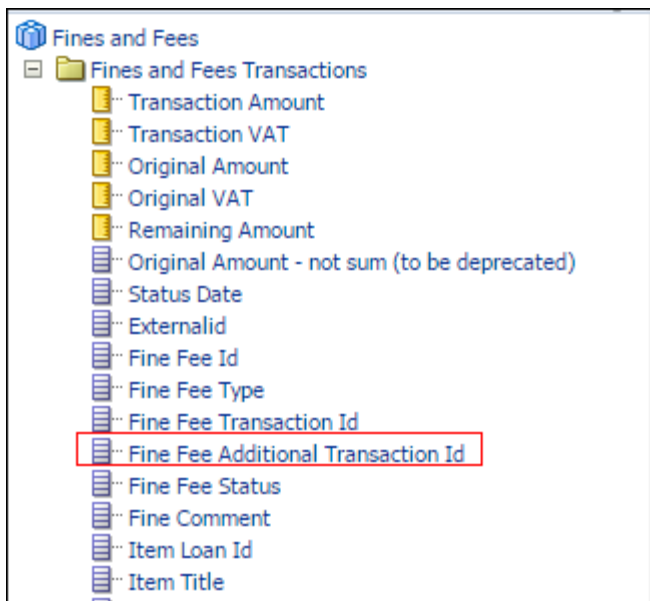
#### Block Expiration Date and Block Expiration Date and Time Fields Report

For more information, see [Block](#).

---

## Fine Fee Additional Transaction ID Added to Fines and Fees

The Fine Fee Additional Transaction ID field has been added to the Fines and Fees Transactions dimension of the Fines and Fees subject area. (This is in addition to the existing Fine Fee Transaction ID field, which stores the unique identifier of the fine or fee transaction.) The new Fine Fee Additional Transaction ID field is useful, for example, in identifying fine and fee transactions that are handled via the APIs.



**Fine Fee Additional Transaction ID**

The following is an example of a report using the new field:

Original Amount	Transaction Amount	Date Key ▲▼	Fine Fee Id	Fine Fee Transaction Id	Fine Fee Additional Transaction Id
100	400	3/16/2016	15956752030001021	15974853270001021	39040001021
50	200		15956754770001021	15974853260001021	38020001021
-100	-100		15974825660001021	15974859540001021	39020001021
36	36	3/15/2016	15974837070001021	15974853330001021	39030001021
168	84		15974840840001021	15974855940001021	39020001021
168	84		15974840840001021	15974856610001021	39050001021

**Fine Fee Additional Transaction ID Report**

For more information, see [Fines and Fees Transactions](#).

## Data Services - April 2016

The Alma March Central KnowledgeBase and Community Zone package was applied to the Alma environments.

---

### Library of Congress Authorities Community Zone Updates

The following are the Library of Congress Subject authority updates for the period of February 25th through March 23rd

- Number of records updated: 78
- Number of records added: 238
- Number of records deleted: 14

The following are the Library of Congress Name authority updates for the period of February 25th through March 23rd:

- Number of records updated: 12477
- Number of records added: 18671
- Number of records deleted: 285

The following are the Canada name authority file updates for the period of February 25th through March 23rd:

- Number of records added: 1151
- 

### New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone during February 29, 2016 through and March 27, 2016:

- De Gruyter eBooks Arts Architecture and Design 2015
- De Gruyter eBooks Classical and Ancient Near Eastern Studies 2015
- De Gruyter eBooks Economics 2015 De Gruyter eBooks Engineering, Computer Sciences 2015
- De Gruyter eBooks History 2015 De Gruyter eBooks Law 2015
- De Gruyter eBooks Library and Information Science 2015

- De Gruyter eBooks Linguistics 2015
- De Gruyter eBooks Literary Cultural and Area Studies 2015
- De Gruyter eBooks Mathematics 2015
- De Gruyter eBooks Medicine and Life Sciences 2015
- De Gruyter eBooks Philosophy 2015
- De Gruyter eBooks Physics, Chemistry, Industrial Chemistry, Materials Sciences, Geosciences 2015
- De Gruyter eBooks Social Sciences 2015
- De Gruyter eBooks Theology and Religious Studies, Jewish Studies 2015
- ebrary Social Sciences Subscription
- JUSTICE Oxford University Press 2016
- Medical\*Online E-Books Library (買切り制)
- Project Muse eBooks 2016
- ProQuest British Periodicals - British Periodicals Collection IV
- ProQuest Harper's Bazaar Archive
- ProQuest Historical Newspapers: Chinese Newspapers Collection
- ProQuest Historical Newspapers: The American Israelite
- ProQuest PAO Periodicals Online Foundation Collection 2
- ProQuest Periodicals Archive Online Jisc Collection 2
- ProQuest Periodicals Archive Online JSTOR Titles
- ProQuest Women's Magazine Archive
- ProQuest Women's Magazine Archive I
- Scientific.net Materials Science Foundations
- TAEBDC ABC-Clio eBooks 2008
- TAEBDC ABC-Clio eBooks 2009
- TAEBDC ABC-Clio eBooks 2010
- TAEBDC ABC-Clio eBooks 2011
- TAEBDC ABC-Clio eBooks 2012
- TAEBDC AiritiBooks 2011
- TAEBDC AiritiBooks 2012
- TAEBDC Books@Ovid 2009
- TAEBDC Books@Ovid 2010
- TAEBDC Books@Ovid 2011

- TAEBDC Books@Ovid 2012
- TAEBDC Cambridge Books Online (CBO) 2008
- TAEBDC Cambridge Books Online (CBO) 2009
- TAEBDC Cambridge Books Online (CBO) 2010
- TAEBDC Cambridge Books Online (CBO) 2011
- TAEBDC Columbia University Press eBooks 2009
- TAEBDC CRC netBase eBooks 2008
- TAEBDC CRC netBase eBooks 2012
- TAEBDC Ebrary eBooks 2009
- TAEBDC Ebrary eBooks 2010
- TAEBDC Ebrary eBooks 2011
- TAEBDC Ebrary eBooks 2012
- TAEBDC Elsevier ScienceDirect eBooks 2009
- TAEBDC Elsevier ScienceDirect eBooks 2010
- TAEBDC Elsevier ScienceDirect eBooks 2011
- TAEBDC Elsevier ScienceDirect eBooks 2012
- TAEBDC Emerald eBooks 2011
- TAEBDC Gale eBooks 2009
- TAEBDC Gale eBooks 2010
- TAEBDC HyRead eBooks 2011
- TAEBDC HyRead eBooks 2012
- TAEBDC IGI Global InfoSci Books 2011
- TAEBDC IGI Global InfoSci Books 2012
- TAEBDC Informa Healthcare eBooks 2011
- TAEBDC Informa Healthcare eBooks 2012
- TAEBDC IOS eBooks 2008
- TAEBDC IOS eBooks 2009
- TAEBDC IOS eBooks 2010
- TAEBDC IOS eBooks 2011
- TAEBDC IOS eBooks 2012
- TAEBDC Karger eBooks 2011
- TAEBDC Karger eBooks 2012

- TAEBDC L&B eBooks 2011
- TAEBDC L&B eBooks 2012
- TAEBDC McGraw-Hill Chinese eBooks 2011
- TAEBDC McGraw-Hill eBooks 2010
- TAEBDC McGraw-Hill eBooks 2011
- TAEBDC McGraw-Hill eBooks 2012
- TAEBDC MyiLibrary eBooks 2008
- TAEBDC MyiLibrary eBooks 2009
- TAEBDC NetLibrary eBooks 2008
- TAEBDC NetLibrary eBooks 2009
- TAEBDC NetLibrary eBooks 2010
- TAEBDC Oxford Scholarship Online (OSO) eBooks 2008
- TAEBDC Oxford Scholarship Online (OSO) eBooks 2009
- TAEBDC Oxford Scholarship Online (OSO) eBooks 2010
- TAEBDC Oxford Scholarship Online (OSO) eBooks 2012
- TAEBDC Palgrave Connect eBooks 2010
- TAEBDC Palgrave Connect eBooks 2012
- TAEBDC Sage eBooks 2008
- TAEBDC Siam eBooks 2008
- TAEBDC Siam eBooks 2012
- TAEBDC Springer eBooks 2008
- TAEBDC Springer eBooks 2009
- TAEBDC Springer eBooks 2010
- TAEBDC Springer eBooks 2011
- TAEBDC Springer eBooks 2012
- TAEBDC Taylor & Francis eBooks 2010
- TAEBDC Taylor & Francis eBooks 2011
- TAEBDC World Scientific eBooks 2012

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## New External Search Resources

No new external search resources were added for this release.

---

## Patron Purchase Requests

### New for April!

---

**PERMISSIONS:** The following roles are required to perform patron purchase request tasks:

- Creating requests: Any role
- Managing requests: Selector
- Delete rejected requests: Selector + Selector Extended

---

Patron purchase requests enables librarians using Alma and patrons using Primo to request that a library purchase an item. The requester can request an item for any reason, for example: the library does not have a copy, or the library does not have enough copies or in the right format or edition, or the existing copy is damaged. The requester (or a librarian on behalf of a requester) fills in as many details of the item as possible and then sends the request to Alma for review.

An Alma user with the **Selector** role (Selectors) can view the list of requests and assign each one to himself/herself or to another user. Selectors can edit a request, email a requester for more information, and approve or reject requests. Approved requests become purchase order lines.

To support this feature, two new letters were added to Alma:

- **Purchase Request Status Letter** – Sent to requester when the request is approved or rejected.
- **Query to Requester** – Sent to the requester when the librarian queries him or her for more information.



For more information, watch the [Patron Purchase Requests video](#) (3:46)

---

**NOTE:** Patron purchase requests are a service exposed from Alma to Primo.

---

**The hero's quest**  
 Bernard Schweizer 1962-; Robert Alan Segal  
 Ipswich, Mass. : Salem Press c2013  
 ● Online access. The library also has physical copies.

View It **Find it in Library** Details Reviews & Tags Virtual Browse

**Boston College Libraries** Actions

Request Options: Request | Digitization | Interlibrary Loan(bla) | Resource sharing request | keren\_June\_2015 | Scanned Book Chapter | **Purchase Request**

Location: O'Neill Stacks (STACK) PN56.5.H45 H53 2013 Locate Hide Details

Availability: (1 copy, 1 available)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
39031032022923	Book	14 Days		Item in place

**Patron Purchase Request Link in Primo**

Like any other service, it can be hidden from groups of users using Alma's Display Logic Rules. This service is currently hidden from all users by default with the rule **Hide Service Purchase Request**.

- To enable the service for all Primo users, remove this rule.
- To hide the service only for specific groups, remove this rule and then add a rule/rules to hide the service for those groups.
- You can also configure all labels used for this feature.

For more information about configuring display logic rules and configuring labels, see [Discovery Interface Display Logic](#).

## Creating a Purchase Request


A patron can create a purchase request in Primo. Requests made by patrons in Primo are submitted to Alma with the status **In Review**. A brief bibliographic record is created for the requested item, if required.

You can also create a patron purchase request on behalf of a user in Alma. You can do this:

- One way to do this is when managing citations in a reading list (see [Managing Citations](#)).
- On the Purchase Request page (see below).

**To create a patron purchase request on the Purchase Request page:**

1. On the Purchase Request page (**Acquisitions > Purchase Requests > Create Purchase Request**), fill in as much information as you can.

 Purchase Request

General Information
Notes

Resource Information

Citation type  Book  Journal

Title \*

Author

Edition

ISBN

LCCN

OCLC number

Publisher

Publication year




Place of publication

Note


Volume


Request Attributes



Requested format  Electronic  Physical



Requester \*    

Request status

Owning Library  

Estimated cost   


Fund   

Vendor/Account   



Approved by -

Requester note

Rejection reason -



Quick Add

Quantity	Library/Location
<input type="text" value="1"/>	<input type="text"/>  
<input type="button" value="Add"/>	

## Alma: Purchase Request Page

For a description of the fields in the Resource Information area, see [Adding a New Book or Journal Article](#). The fields in the **Request Attributes** area are as follows:

- **Requested Format** – Whether the item should be acquired in electronic or physical format
- **Requester** – The user who is making the request
- **Request Status** – The initial status of the request, which is always **In Review**
- **Owning Library** – The library that should receive the item
- **Estimated Cost** – An estimated cost for the item, including the currency
- **Fund** – The fund from which to purchase the item. This field is only active after a library is selected.
- **Vendor/Account** – The vendor and vendor account from which to purchase the item
- **Approved By** – This field is initially empty. It will later contain the name of the user who approved the item, if any.
- **Requester Note** – Any note to send to the user who will be approving or rejecting the request.
- **Rejection Reason** – This field is initially empty. This field will later contain the reason the request was rejected, if any.

The fields **Title** and **Requester** are mandatory.

Instead of entering the information manually, you can click **Locate**, search for and select an item in the repository, and click **Select**. The item's information is pre-filled in the page's fields.

2. If you enter a **Library**, you can add locations and the number of requested copies for each location in the **Quick Add** area. If you do not specify quantities and locations, one copy in the default Acquisitions location is assumed.
3. Add any notes in the **Notes** tab, as required.
4. When you are done, click **Save**.

The request is submitted with the status **In Review**. A brief bibliographic record is created for the requested item, if required.

---

## Managing Patron Purchase Requests

The following tasks are available to manage patron purchase requests:

- [Viewing Pending Purchase Requests](#)
- [Assigning a Patron Purchase Request](#)

- [Editing a Patron Purchase Request](#)
- [Emailing a Patron Purchase Request](#)
- [Approving or Rejecting a Patron Purchase Request](#)

## Viewing Pending Purchase Requests

To view pending purchase requests, select **Acquisitions > Purchase Requests > Manage Purchase Requests** from the Alma Main Menu. Alternately, if there are any unassigned requests, or there are any requests assigned to you, select one of the following tasks from the Tasks List in the persistent menu:

- Purchase requests - assigned to you
- Purchase requests - unassigned

**Manage Purchase Requests** Reject Selected

Limit results to:

- Status
  - Approved (8)
  - In Review (9)
  - Rejected (2)
- Citation type
  - Book (16)
  - Journal (3)
- Request format
  - Physical (19)
- Owning library
  - Main Library (3)
  - Main Reading Room (2)
  - Law Library (1)
  - Art Library (2)
  - Music Library (1)
- Owning library
  - Law Library (1)
  - Main Library (1)
  - Main Reading Room (1)
- Requester
  - API, Ex Libris (1)
  - Aadland, Dustin (1)
  - Implementor, Ex Libris (9)
- Requester
  - Aadland, Dustin (1)
  - Implementor, Ex Libris (4)
  - API, Ex Libris (1)
  - Implementor, Ex Libris (5)

Assigned to Me | Unassigned | Assigned to Others

Find:  in: All

0 rows selected 1 - 19 of 19 Records Columns Tools

Select All

- [War in history](#)  
Citation type: Book  
Request status: In Review  
Requester: Implementor, Ex Libris   
Created on: 14/03/2016  
Updated on: 14/03/2016  
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)
- [Reading Harry Potter Critical Essays](#)  
Citation type: Book  
Request status: In Review  
Requester: Implementor, Ex Libris   
Created on: 14/03/2016  
Updated on: 14/03/2016  
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)
- [sssssssssss](#)  
Citation type: Book  
Request status: In Review  
Requester: Implementor, Ex Libris   
Created on: 13/03/2016  
Updated on: 13/03/2016  
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)
- [tests](#)  
Citation type: Book  
Request status: In Review  
Requester: Implementor, Ex Libris   
Created on: 13/03/2016  
Updated on: 13/03/2016  
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)
- [ooooooooooooo](#)  
Citation type: Book  
Request status: In Review  
Requester: Implementor, Ex Libris   
Created on: 13/03/2016  
Updated on: 13/03/2016  
[Edit](#) | [Approve and Order](#) | [Reject](#) | [Send query to requester](#) | [Assign to](#)
- [lalalalalalal](#)  
Citation type: Book

### Manage Purchase Requests Page

Use the tabs to see requests assigned to you or to others, or to view unassigned requests. Use the facets and the **Find** tool to filter the list of requests on the page.

**To view more details about the requested item:**

- Click a request title to view the request in the MARC Record Simple View page.
- In the **Unassigned** or **Assigned to Other** tab, click **View** beneath a request to view the request details. The **View** link only appears in the **Unassigned** tab if the request was ordered or rejected.

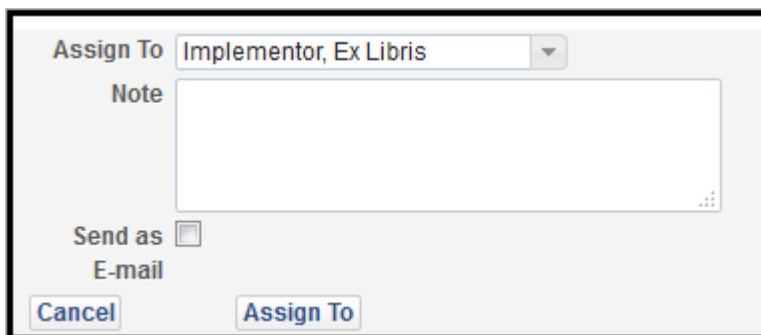
---

## Assigning a Patron Purchase Request

You can assign a patron purchase request to a user or release an assignment. The user to which the request is assigned should approve or reject the request.

**To assign requests to a user:**

1. Click **Assign** to beneath a request. A dialog box appears.



**Assign To Dialog Box**

2. Select the user to whom to assign the request. Only users with the relevant role appear in the dropdown list.
3. Optionally add a note and select whether to send an email to the user.
4. Click **Assign To**.

The request is assigned to the selected user.

**To move a request back to unassigned:**

In the **Assigned to Me** or **Assigned to Others** tab, click **Release Assignment** beneath a request. The request is moved back to the **Unassigned** tab.

---

## Editing a Patron Purchase Request

You can edit a patron purchase request.

### To edit a request:

1. In the **Assigned to Me** or **Unassigned** tab, click **Edit** beneath a request. The Purchase Request page appears. For more information, see [Creating a Patron Purchase Request](#).
2. Change any fields, as required. When you are done, click **Save**.

---

**NOTE:** If the request was not already assigned to you, it is now assigned to you.

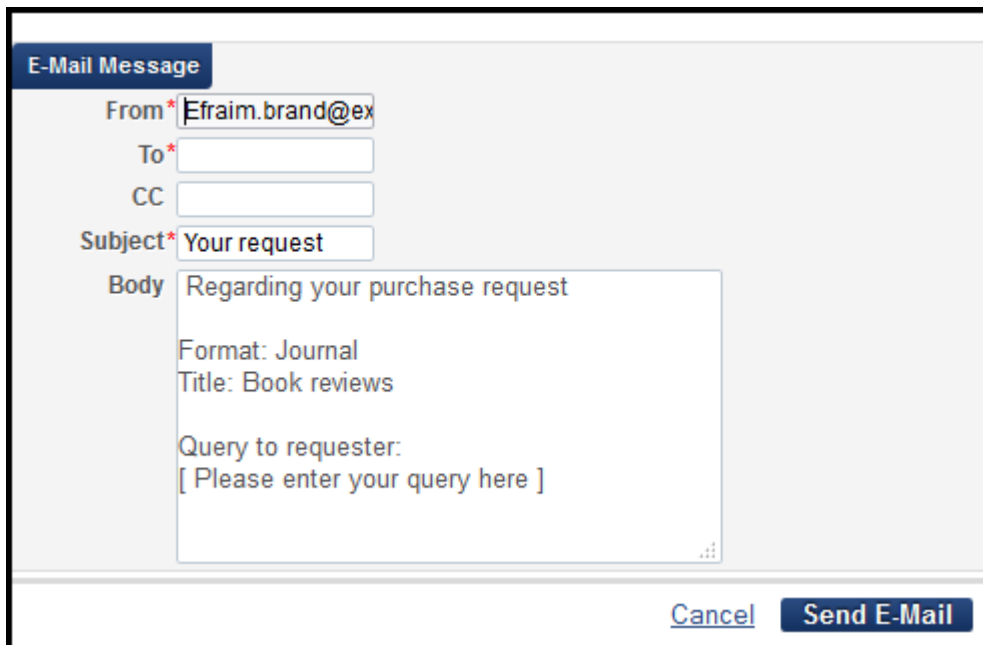
---

## Emailing a Patron Purchase Requester

You can email the requester for more information about a patron purchase request.

### To send email to the requester:

1. Click **Send Query to Requester** beneath any request. An Email Message dialog box appears.



The screenshot shows an "E-Mail Message" dialog box with the following fields and content:

- From\***: Efrain.brand@ex
- To\***: (empty)
- CC**: (empty)
- Subject\***: Your request
- Body**:
  - Regarding your purchase request
  - Format: Journal
  - Title: Book reviews
  - Query to requester:  
[ Please enter your query here ]

At the bottom right, there are two buttons: "Cancel" and "Send E-Mail".

### E-Mail Message Dialog Box

2. Enter information in the fields. The **From**, **To**, and **Subject** fields are mandatory. Note that if the requester's email is not prefilled, you must enter it manually.
3. When you are done, click **Send E-Mail**. An email (**Query to Requester**) is sent to the requester.

---

## Approving or Rejecting a Patron Purchase Request

Approving a patron purchase request creates a purchase order line. Whether you approve or reject the request, Alma sends an email to the requester.

### To create a purchase order line for the request:

Before ordering the item, ensure that a library and/or location is selected in the request. If one is not selected, edit the request; see [Editing a Patron Purchase Request](#).

Click **Approve and Order** beneath a request. A PO line is created. The PO line number appears in the confirmation message at the top of the page. Alma sends the requester a confirmation letter (**Purchase Request Status Letter**).

### To reject a request:

1. Click **Reject** beneath any request. A confirmation dialog box appears.

Alternately, you can reject multiple reasons at once: Select the check boxes next to the reasons that you want to reject and click **Reject Selected** at the top or bottom of the page. You can select all the requests on the page by clicking **Select All** at the top of the list of requests.

2. Click **Confirm** in the confirmation dialog box. A reject reason dialog box appears.

A screenshot of a dialog box titled "Reject Reason Dialog Box". The dialog box has a light gray header with the text "Reject reason" and a dropdown menu showing "Cost". Below the header is a large white area for selecting a reason. At the bottom right of the dialog box are two buttons: "Cancel" and "Reject".

**Reject Reason Dialog Box**

This list of reasons can be configured by an administrator.

3. Select the reason for the rejection and click **Reject**. The request is rejected. If the request created a brief bibliographic record, it is also deleted. Alma sends the requester a confirmation letter (**Purchase Request Status Letter**).

After a request is rejected, it appears in the list of requests with the option to delete the request. To delete the request, click **Delete** beneath the request.

---

**NOTE:** To delete a patron purchase request, you must have the **Selector Extended** role.

---

## Configuring Invoice Line Types

### New for April!

---

**PERMISSIONS:** The following roles can configure which additional charges are available to add to invoices:

- Acquisitions Administrator
  - General System Administrator
- 

Out of the box, the special invoice lines **Shipment**, **Insurance**, **Overhead**, and **Discount** automatically appear for each new invoice, and you can enable additional lines of these types, as well as lines of type **Other** or **Regular**.

You can enable additional line types that can be added to invoices on the new Invoice Line Types code table ([Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Invoice Line Types](#)). This link appears only after enabling a parameter in the Customer Parameters mapping table (see below).

---

**NOTE:** You can enable as many line types as you like. However, each invoice can only contain up to five types of invoice line.

---

Code Table Cancel Customize

You are configuring: University of Texas at Dallas

**Table Information**

Sub System ACQUISITION      Table Name Invoice Line Types  
 Updated By -      Updated on -  
 Patron Facing No      Table Description Invoice Line Types  
 Table code InvoiceLinesTypes

**Invoice Line Types**

Filter: English

Tools

	Enabled	Code	Description	Translation	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	ALL	All	All	-	-	Customize
2	<input checked="" type="checkbox"/>	REGULAR	Regular	Regular	-	-	Customize
3	<input checked="" type="checkbox"/>	OTHER	Other	Other	-	-	Customize
4	<input checked="" type="checkbox"/>	ADDITIONAL_CHARGES	Additional Charges	Additional Charges	-	-	Customize
5	<input checked="" type="checkbox"/>	SHIPMENT	Shipment	Shipment	-	-	Customize
6	<input checked="" type="checkbox"/>	INSURANCE	Insurance	Insurance	-	-	Customize
7	<input checked="" type="checkbox"/>	DISCOUNT	Discount	Discount	-	-	Customize
8	<input checked="" type="checkbox"/>	OVERHEAD	Overhead	Overhead	-	-	Customize
9	<input checked="" type="checkbox"/>	ADJUSTMENT	Adjustment	Adjustment	-	-	Customize
10	<input checked="" type="checkbox"/>	BA	Supply of approvals/book collections	Supply of approvals/book collections	-	-	Customize
11	<input checked="" type="checkbox"/>	BB	Barcode labelling	Barcode labelling	-	-	Customize
12	<input checked="" type="checkbox"/>	BC	Classification	Classification	-	-	Customize
13	<input checked="" type="checkbox"/>	BG	General servicing by library bookseller	General servicing by library bookseller	-	-	Customize
14	<input checked="" type="checkbox"/>	BI	Binding	Binding	-	-	Customize
15	<input checked="" type="checkbox"/>	BJ	Sleeving	Sleeving	-	-	Customize
16	<input checked="" type="checkbox"/>	BM	Data communication	Data communication	-	-	Customize
17	<input checked="" type="checkbox"/>	BN	Miscellaneous servicing	Miscellaneous servicing	-	-	Customize
18	<input checked="" type="checkbox"/>	BP	Audio/CD-ROM packaging	Audio/CD-ROM packaging	-	-	Customize
19	<input checked="" type="checkbox"/>	BS	Security fitting	Security fitting	-	-	Customize
20	<input checked="" type="checkbox"/>	CA	Cataloguing services	Cataloguing services	-	-	Customize
21	<input checked="" type="checkbox"/>	CB	Commission	Commission	-	-	Customize
22	<input checked="" type="checkbox"/>	DL	Delivery	Delivery	-	-	Customize
23	<input checked="" type="checkbox"/>	ER	Exchange rate guarantee charge	Exchange rate guarantee charge	-	-	Customize
24	<input checked="" type="checkbox"/>	HD	Handling charge	Handling charge	-	-	Customize

### Invoice Line Types Code Table



For more information, watch the [Additional Invoice Charges video](#) (2:36)

The lines that can be made available for invoices include:

- All
- Regular
- Other
- Additional Charges
- Shipment
- Insurance

- Discount
- Overhead
- Supply of approvals/book collections
- Barcode labelling
- Classification
- General servicing by library bookseller
- Binding
- Sleevings
- Data communication
- Miscellaneous servicing
- Audio/CD-ROM packaging
- Security fitting
- Cataloguing services
- Commission
- Delivery
- Exchange rate guarantee charge
- Handling charge
- Small order surcharge
- Insurance charge
- Posting charge
- Packing charge
- Postage and packing charge
- Special handling
- Miscellaneous credit adjustment
- Miscellaneous charge

After you enable a line type, you can add it as an invoice line to the invoice on the Add Invoice Line dialog box. Alternately, you can specify its value as a pro rata **Additional Charge** if you check **Use Pro Rata** in the **Additional Charges** area on the **Summary** tab of the Invoice Details page (see below). For more information, see [Creating Invoices](#).

Enabled line types can also be read from incoming EDI invoices. Any EDI additional charges that do not match enabled types are added to an invoice line **Overhead**.

**To configure which additional charges are available to add to invoices:**

1. Enable [invoice\\_split\\_additional\\_charges](#) in the Customer Parameters mapping table.
2. On the Invoice Line Types code table, click **Customize** next to the line type.
3. Select the checkbox in the **Enabled** column to enable/disable the invoice line type.
4. To change the text that appears for a line type on the invoice, enter new text in the **Description** column. In this example, **Sleeving** is enabled.

The screenshot shows the 'Code Table' configuration page for 'Invoice Line Types'. The table below is a representation of the data shown in the interface.

	Enabled	Code	Description	Translation	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	ALL	All	All	-	-	Customize
2	<input checked="" type="checkbox"/>	REGULAR	Regular	Regular	-	-	Customize
3	<input checked="" type="checkbox"/>	OTHER	Other	Other	-	-	Customize
4	<input checked="" type="checkbox"/>	ADDITIONAL_CHARGES	Additional Charges	Additional Charges	-	-	Customize
5	<input checked="" type="checkbox"/>	SHIPMENT	Shipment	Shipment	-	-	Customize
6	<input checked="" type="checkbox"/>	INSURANCE	Insurance	Insurance	-	-	Customize
7	<input checked="" type="checkbox"/>	DISCOUNT	Discount	Discount	-	-	Customize
8	<input checked="" type="checkbox"/>	OVERHEAD	Overhead	Overhead	-	-	Customize
9	<input checked="" type="checkbox"/>	ADJUSTMENT	Adjustment	Adjustment	-	-	Customize
10	<input checked="" type="checkbox"/>	BA	Supply of approvals/book collections	Supply of approvals/book collections	-	-	Customize
11	<input checked="" type="checkbox"/>	BB	Barcode labelling	Barcode labelling	-	-	Customize
12	<input checked="" type="checkbox"/>	BC	Classification	Classification	-	-	Customize
13	<input checked="" type="checkbox"/>	BG	General servicing by library bookseller	General servicing by library bookseller	-	-	Customize
14	<input checked="" type="checkbox"/>	BI	Binding	Binding	-	-	Customize
15	<input checked="" type="checkbox"/>	BJ	Sleeving	Sleeving	exl_impl	01/05/2016	Restore
16	<input checked="" type="checkbox"/>	BM	Data communication	Data communication	-	-	Customize
17	<input checked="" type="checkbox"/>	BN	Miscellaneous servicing	Miscellaneous servicing	-	-	Customize
18	<input checked="" type="checkbox"/>	BP	Audio/CD-ROM packaging	Audio/CD-ROM packaging	-	-	Customize
19	<input checked="" type="checkbox"/>	BS	Security fitting	Security fitting	-	-	Customize
20	<input checked="" type="checkbox"/>	CA	Cataloguing services	Cataloguing services	-	-	Customize
21	<input checked="" type="checkbox"/>	CB	Commission	Commission	-	-	Customize

**Invoice Line Types Code Table**

5. When you are done, click **Customize** at the top or bottom of the page.

---

**NOTE:** You can enable up to five additional line types

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---

## Managing Funds and Ledgers

---

**PERMISSIONS:** To manage funds, you must have the following role:

- Fund Manager

To manage ledgers, you must have the following role:

- Ledger Manager
- 

You manage funds and ledgers from the Funds and Ledgers page ([Acquisitions > Acquisitions Infrastructure > Funds and Ledgers](#)).

You can add funds only to ledgers that have already been defined. You can add encumbrances to the fiscal period of a fund or ledger only if:

- The fiscal period is **Active**
- The date range of the fiscal period includes the current date

Alternatively, you can add encumbrances to a fund's fiscal period prior to or after the actual fiscal period, provided the relevant fields are configured in the **Rules** section of the Summary Details page ([Acquisitions > Acquisitions Infrastructure > Funds and Ledgers](#), click **Add Ledger**). For details on the fields in the **Rules** section, see [Ledger Rules](#).

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## Fund Transaction Terminology

- A fund can be allocated or summary.
  - A *summary* fund is not used for ordering and invoicing, but provides aggregate reporting on subordinate funds. You can add other funds to this type of fund.
  - An *allocated* fund contains money that has been paid out or has been reserved for an open purchase.
- A *transaction* can be an allocation, encumbrance, disencumbrance, or expenditure:
  - An *allocation* adds money to the fund, increasing its available balance.
  - An *encumbrance* indicates money that is expected to be paid out, as the result of a PO line. This decreases its available balance. The encumbrance is closed if there is an equal disencumbrance linked to the same PO line.

- An *expenditure* subtracts money from the fund, decreasing its available balance. Adding an expenditure lined to a PO line increases the value of the disencumbrance linked to that PO line.
- A *disencumbrance* is added or increased when adding an expenditure linked to the same PO line as an encumbrance. There is never more than one disencumbrance for any encumbrance. For example:
  - If a fund has a \$100 encumbrance for a PO line. An invoice for \$50 linked to that PO line is received. The encumbrance remains \$100, an expenditure of \$50 is added, and a disencumbrance of \$50 is added.
  - After receiving another \$50 invoice for the PO line, there are now two expenditures (each for \$50), an encumbrance of \$100, and a disencumbrance of \$100. The encumbrance is now considered fully paid and is closed.
- A fund's *available balance* is its allocated balance, less encumbrances and expenditures.

## New for April!

### Exchange Rate Handling in Funds

When a PO line creates an encumbrance in a currency that is different than the fund's currency, the available balance is calculated based on the exchange rate between the two currencies. The exchange rates and calculated values of open encumbrances in a foreign currency are recalculated weekly by the **Recalculate Exchange Rate Based on Current Date** job (see [Viewing Scheduled Jobs](#)). The exchange rate and date of a disencumbrance are always the same as its related encumbrance.

In the following example, a purchase is made in USD on Thursday, and the invoices are received on Sunday and Tuesday.

Exchange Rate Recalculation Example

Date	Events	Exchange Rate EUR/USD	Encumbrance	Expenditures	Disencumbrance
Thursday	A USD 100 PO Line is sent, to be paid from a EUR fund	0.91	Value: 100 USD Calculated: EUR 91 Exchange Rate Date: Thursday Status: Open		

Date	Events	Exchange Rate EUR/USD	Encumbrance	Expenditures	Disencumbrance
Friday		0.92	Value: 100 USD Calculated: EUR 91 Exchange Rate Date: Thursday Status: Open		
Saturday	The recalculation job runs	0.93	Value: 100 USD Calculated: EUR 93 Exchange Rate Date: Saturday Status: Open		
Sunday	An invoice for \$50 associated with this PO line arrives	0.94	Value: 100 USD Calculated: EUR 93 Exchange Rate Date: Saturday Status: Open	1: 47 EUR (50 USD based on Sunday's exchange rate date)	Value: 50 USD Calculated: EUR 46.50 Exchange Rate Date: Saturday
Monday		0.92	Value: 100 USD Calculated: EUR 93 Exchange Rate Date: Saturday Status: Open	1: 47 EUR	Value: 50 USD Calculated: EUR 46.50 Exchange Rate Date: Saturday
Tuesday	An invoice for \$50 associated with this PO line arrives The PO line is fully paid and the encumbrance is closed.	0.90	Value: 100 USD Calculated: EUR 93 Exchange Rate Date: Saturday Status: Closed	1: 47 EUR 2: 45 EUR (50 USD based on Tuesday's exchange rate date)	Value: 100 USD Calculated: EUR 93 Exchange Rate Date: Saturday

## Browsing Bibliographic Headings

**New for April!**

**PERMISSIONS:** To configure metadata, you must have one of the following roles:

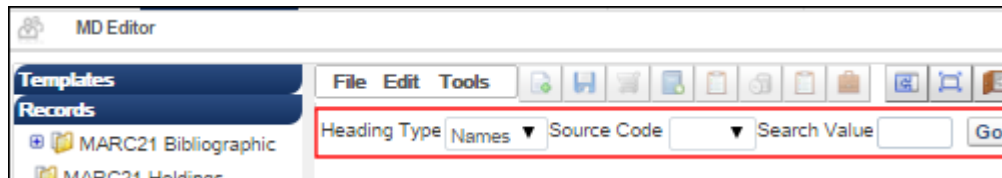
- Cataloger
- Catalog Manager
- Catalog Administrator

Alma provides better cataloging management utilities in the form of bibliographic headings browsing for supporting various cataloging workflows. With this feature, you can now browse by author name, subject, series, and title.

**NOTE:** There is a known issue that when a record is deleted in Alma, the headings associated with that record are still available when browsing bibliographic headings. This will be fixed in a future release.

### To browse bibliographic headings:

1. Open the bibliographic headings browsing options in the MD Editor using one of the following methods:
  - a. Click Browse Bibliographic Headings (**Resource Management > Cataloging**). The MD Editor page appears with the bibliographic headings browsing options.



#### Bibliographic Headings Browse in the MD Editor

- b. Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**), and click **Browse Bib Headings** in the Tools menu.
2. Select the type of headings to browse from the following options:
  - Names (the default option)
  - Series
  - Subject

- Title

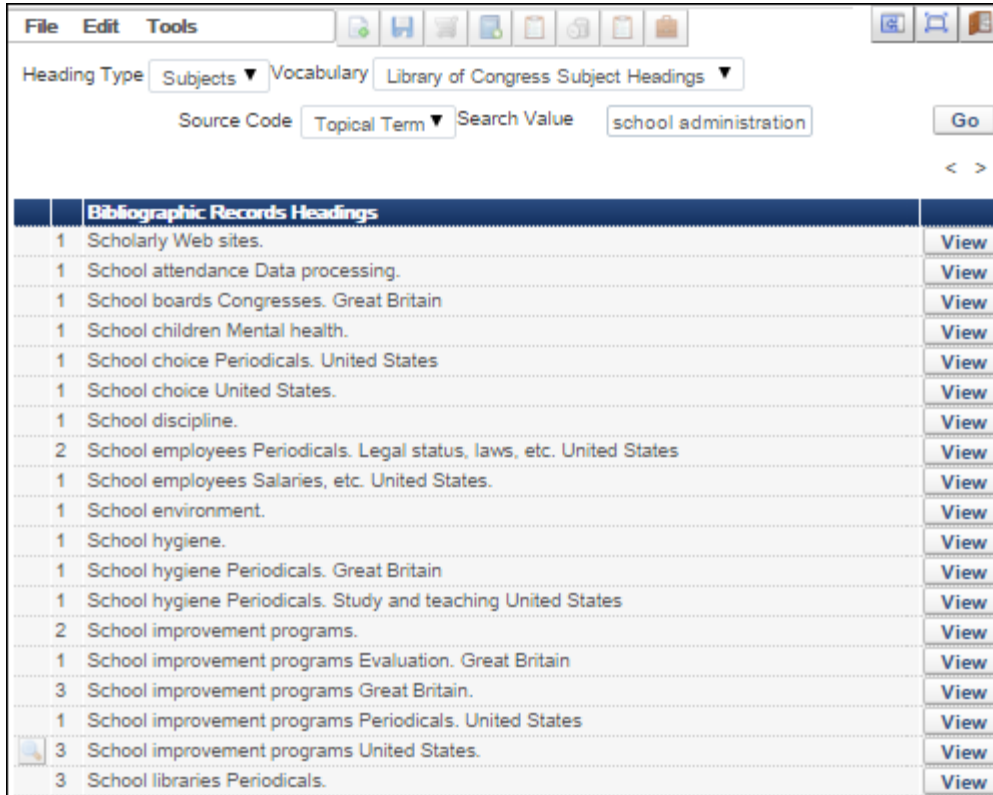
When you select a headings type option other than the default (Names), the page refreshes to display the appropriate options for the headings type selected.

3. Complete the browsing options for the action you want to perform. See the table below for a description of these options.

Headings Type	Options
Names	Source Code – Select one of the following options: <ul style="list-style-type: none"> <li>■ Corporate Name</li> <li>■ Meeting Name</li> <li>■ Personal Name</li> <li>■ Uniform Title</li> </ul> Search Value – Enter a names value for which you want to search.
Series	Source Code – Select one of the following options: <ul style="list-style-type: none"> <li>■ Corporate Name</li> <li>■ Meeting Name</li> <li>■ Personal Name</li> <li>■ Uniform Title</li> </ul> Search Value – Enter a names value for which you want to search.
Subjects	Vocabulary – Select one of the vocabularies from the available options in the <b>Library of Medicine, Medical Subject Headings</b> . The options that appear vary.           Source Code – Select one of the following options: <ul style="list-style-type: none"> <li>■ Chronological Term</li> <li>■ Genre/Form</li> <li>■ Geographic Name</li> <li>■ Medium of Performance</li> <li>■ Topical Term</li> </ul> Search Value – Enter a names value for which you want to search.
Title	Search Value – Enter a names value for which you want to search.

4. Click **Go**. The browsing results appear. The results appear in the following columns:
  - Column 1 – An icon to indicate whether the bibliographic subject heading is connected to an authority record.

- Column 2 – The number of bibliographic record headings found for a particular subject, name, series, or title headings row. If there are more than 20 headings found for a particular row, this column displays 20+.
- Column 3 – The bibliographic record headings subject, name, series, or title found.
- Column 4 – A **View** button for viewing the complete bibliographic record.



#### Bibliographic Headings Browse Results for a Subjects Browse

5. Use the less than/greater than symbols (< >) to browse the list backward and forward. As you page backward and forward, the first row of the page you are viewing appears as the last row of the previous page.
6. When you have located a headings record that you want to view in more detail, click **View** for that row. The MD Editor opens in split-screen mode to display the additional information. For bibliographic headings records identified with the authority icon, the detail in the split-screen view displays both an **Authority** tab and a **Bibliographic Records** tab. The **Authority** tab presents the authority record that is associated with the bibliographic headings record. The **Bibliographic Records** tab shows the total number of records found in parentheses. In the example below, 3 records have been identified. When there are more than 20 records (that are identified by 20+ in the initial results list), the exact total of bibliographic records displays in parentheses on the Bibliographic Records tab.

Authority(98170396060000041) Bibliographic Records(3)

School improvement programs United States (98170396060000041)

LDR 00421nz##a2200133n##4500  
005 20080312080657.0  
008 080311||#anannbabn#####|n#ana#####  
001 98170396060000041  
010 \$\$a sh2008111248  
040 \$\$a DLC \$\$b eng \$\$c DLC  
150 \$\$a School improvement programs \$\$z United States  
667 \$\$a Record generated for validation purposes.  
670 \$\$a Work cat.: 7 steps for developing a proactive schoolwide discipline plan, c2007  
035 # # \$\$a (DLC) sh2008111248

View Headings Record Detail in Split-Screen Mode – Authority Tab

Authority(9817039606000041) Bibliographic Records(3) 1 - 3 of 3 Records

- 1 [Learning to teach in urban schools the transition from preparation to practice /\(9924965300121\)](#)  
By Hollins, Etta R., (Book Routledge, London :, 2011.)  
ISBN: 0-415-89386-0  
Subjects: Electronic books., Education., School improvement programs United States. ...  
Other System Number: (StDuBDS)AH24073050, (CKB)2670000000148482  
[View](#)
- 2 [Critical voices in school reform students living through change /\(9922781500121\)](#)  
By Rubin, Beth C. (Book RoutledgeFalmer, London :, 2003.)  
ISBN: 0-415-30267-6  
Subjects: Electronic books., Education., Educational sociology United States. ...  
Other System Number: (StDuBDS)AH3710716, (CKB)1000000000248958  
[View](#)
- 3 [A creative approach to common core standards : the Da Vinci curriculum /\(991408550000121\)](#)  
By Chaucer, Harry. (Book Rowman & Littlefield Education, Lanham, Md. :, c2012.)  
ISBN: 1610486749 (electronic)  
Subjects: School improvement programs United States., Curriculum change United States., Education, Secondary Standards United States. ...  
Other System Number: (OCoLC)ocn769990502, (OCoLC)769990502  
[View](#)

View Headings Record Detail in Split-Screen Mode – Bibliographic Records Tab

File Edit Tools Vocabulary Library of Cong Source Top Search latin Go Authority(9817016947000041) Bibliographic Records(54)

Heading Type	Source Code	Search Value
<b>Bibliographic Records Headings</b>		
1	Feminism and art Latin America.	<a href="#">View</a>
1	Feminism and art New York (State) New York.	<a href="#">View</a>
2	Feminism and art Periodicals.	<a href="#">View</a>
1	Feminism and art United States.	<a href="#">View</a>
1	Feminism and dance.	<a href="#">View</a>
1	Feminism and dance History 20th century. United States	<a href="#">View</a>
20+	Feminism and education.	<a href="#">View</a>
2	Feminism and education Canada.	<a href="#">View</a>
3	Feminism and education Case studies. United States	<a href="#">View</a>
3	Feminism and education Congresses.	<a href="#">View</a>

Feminism and education (9817016947000041)

LDR 00436nz##a2200169n##4500  
005 19930113093509.6  
008 921130#anannbab#\*\*\*\*\*#anann#  
001 9817016947000041  
010 \$\$a sh 92006402  
040 \$\$a DLC \$\$c DLC  
053 \$\$a LC197  
150 0 \$\$a Feminism and education  
450 0 \$\$a Education and feminism

20+ Records Example

From the Bibliographic Records tab, you can click **View** (or the title link) to display the MARC record for a particular bibliographic record. While viewing the MARC record, you can page forward and backward through the bibliographic records when there is more than one using the list number or greater than/less than symbols.

```
1 2 > >>
----- Learning to teach in urban schools the transition from preparation to practice / B
LDR      03416nam#a2200361#a#4500
001      992670000000148482
005      20120527213916.0
007      cr|||||||||
008      110712s2011####enk####fs####000#0#eng|d
020      $$e 1-283-46074-2
020      $$e 9786613460745
020      $$e 1-136-71555-X
```

**Paging Forward and Backward When There are Multiple Bibliographic Records**

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## Using the Authority Control Task List

### New for April!

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**PERMISSIONS:** To use the Authority Control Task List, you must have one of the following roles:

- Cataloger
- Catalog Manager
- Catalog Administrator

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The Authority Control Task List provides more details regarding authority record updates and the authority control process that are relevant to the institution's bibliographic record headings.

The Authority Control Task List makes it easier to manage cataloging maintenance tasks. Specifically, this list highlights authority headings updates that require manual intervention. The following is a list of changes highlighted in the Authority Control Task List, some of which may require manual intervention due to a linking issue, a preferred-term correction issue, or deleted/updated authority record:

- Linking – Bibliographic heading found no matching authority heading
- Linking – Bibliographic heading found multiple matching authority headings

This issue may occur as a result of times, for example, when the Library of Congress splits one subject heading into two subject headings such as **Nurses and nursing** is split and replaced with **Nurses** and **Nursing**. It may also occur when the system finds a Community Zone authority record and a local authority record match.

- Linking – Bibliographic heading linked to an authority record
- Preferred term correction – Bibliographic heading updated
- Preferred term correction – Bibliographic heading found no authorized term
- Authority record deleted – Unlinked the bibliographic heading
- Authority record updated

From the Authority Control Task List page, you can choose to view the tasks from the **Review** tab or the **All** tab. The **Review** tab contains a list of all the tasks that require some action, and the **All** tab displays all the tasks that have not yet been dismissed.

These lists can be filtered by date or by the type of action/change.



For more information, see the [Authority Control Task List](#) video (1:37 min.).

### To process changes with the Authority Control Task List:

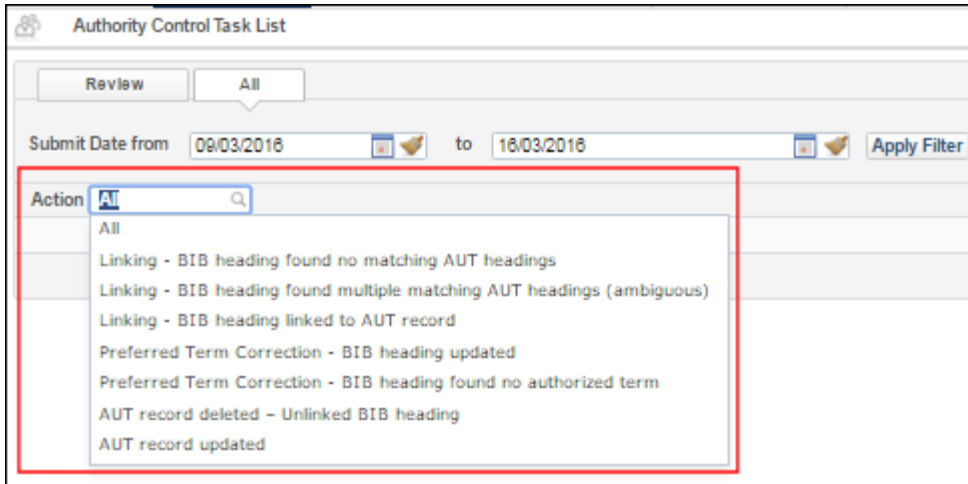
1. Open the Authority Control Task List page ([Resource Management](#) > [Cataloging](#) > [Authority Control Task List](#)).

Authority Control Task List Page

2. Filter by **Submit Date** or **Action** to view the tasks upon which you want to focus.

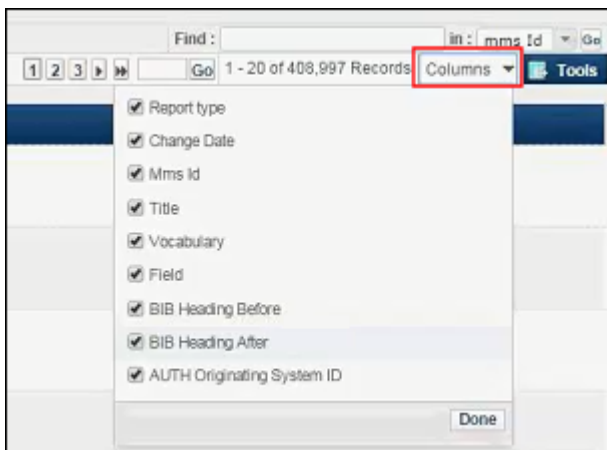
Authority Control Task List Page – Filtering

Review Tab Action Filter



### All Tab Action Filter

3. On the **All** tab, you can also choose to limit your view to certain columns by using the **Columns** drop-down list to make selections.



### Columns Filter

4. From the list, click a title link (from the Title column) to view a record that you want to process.

Authority Control Task List									
<input type="button" value="Cancel"/> <input type="button" value="Dismiss Selected"/> <input type="button" value="Execute"/> <input type="button" value="Back"/>									
<input type="button" value="Review"/> <input type="button" value="All"/>									
Submit Date from <input type="text" value="09/03/2016"/> to <input type="text" value="16/03/2016"/> <input type="button" value="Apply Filter"/>									
Action <input type="text" value="All"/> Find: <input type="text"/> in: <input type="text" value="mms Id"/> <input type="button" value="Go"/>									
<input type="button" value="Go"/> 69,561 - 69,580 of 148,208 Records <input type="button" value="Columns"/> <input type="button" value="Tools"/>									
Report type	Change Date	Mms Id	Title	Vocabulary	Field	BIB Heading			
81 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991186800000541	<a href="#">People in power : forging a gras...</a>	UNAME	100	Ruchwarger, Gary.	<input type="button" value="Dismiss"/>		
82 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991489850000541	<a href="#">People &amp; events of the America...</a>	LCSH	851	United States History Biography. Revolution, 1775-1783	<input type="button" value="Dismiss"/>		
83 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991489850000541	<a href="#">People &amp; events of the America...</a>	UNAME	700	Hammerman, Gay M.	<input type="button" value="Dismiss"/>		
84 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991489850000541	<a href="#">People &amp; events of the America...</a>	UNAME	100	Dupuy, Trevor Nevitt, 1916-	<input type="button" value="Dismiss"/>		
85 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991489850000541	<a href="#">People &amp; events of the America...</a>	LCSH	851	United States History Chronology. Revolution, 1775-1783	<input type="button" value="Dismiss"/>		
86 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991375440000541	<a href="#">People, church, and state in mo...</a>	UNAME	100	Anderson, Paul B., 1894-	<input type="button" value="Dismiss"/>		
87 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991128840000541	<a href="#">People behave like ballads /</a>	UNAME	100	Coffin, Robert Peter Tristram, 1892-1955.	<input type="button" value="Dismiss"/>		
88 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	999886600000541	<a href="#">People and their environment; te...</a>	UNAME	700	Brennan, Matthew J. 1937- (Matthew John),	<input type="button" value="Dismiss"/>		
89 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	999357500000541	<a href="#">People and profits : the ethics o...</a>	UNAME	100	Steidlmeier, Paul, 1942-	<input type="button" value="Dismiss"/>		
70 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991485750000541	<a href="#">People and power : electricity s...</a>	UNAME	830	Directions in development (Washington, D.C.). Energy and mining.	<input type="button" value="Dismiss"/>		
71 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991485750000541	<a href="#">People and power : electricity s...</a>	UNAME	700	Banerjee, Sudeshna Ghosh, 1973-	<input type="button" value="Dismiss"/>		
72 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991485750000541	<a href="#">People and power : electricity s...</a>	UNAME	700	Branczik, Amelia, 1978-	<input type="button" value="Dismiss"/>		
73 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991485750000541	<a href="#">People and power : electricity s...</a>	UNAME	100	Lampietti, Julian A.	<input type="button" value="Dismiss"/>		
74 <input type="checkbox"/> Linking - BIB heading found no matching AUT headings	10/03/2016	991485750000541	<a href="#">People and power : electricity s...</a>	UNAME	710	Energy Sector Management Assistance Programme.	<input type="button" value="Dismiss"/>		

### Authority Control Task List Page - Title Link

While reviewing the list, sometimes you may notice that the same record (MMS ID) may be identified with two different errors. This may be caused by the system checking the Community Zone authority records and also checking local authority records for a match.

The title opens in the MARC Record Simple View page from which you can click **Edit** to make any changes.

MARC Record Simple View [Back](#) [Edit](#)

Title People in power : forging a grassroots democracy in Nicaragua /  
MMS ID 99116880000541

Originating system ILS      Originating system ID 36477-train20072\_c2db      Originating System Version -  
Suppress from publishing No      Export to WorldCat Don't publish      Brief record No  
Export to Libraries No      Record Format marc21  
Australia

[Tools](#)

LDR 00842pam a2200253 a 4500

001 36477

008 870504s1987 maub b 001 0 eng

010 \_\_ |a 87012623

020 \_\_ |a 0897891295 (alk. paper) : |c \$34.95

020 \_\_ |a 0897891309 (pbk. : alk. paper) : |c \$16.95

035 \_\_ |a ocm15695630

035 \_\_ |a (TrN)36477-train20072\_c2db

040 \_\_ |a DLC |c DLC |d SHC

043 \_\_ |a ncnq--

049 \_\_ |a SHCM

050 0\_ |a JL1616 |b .R82 1987

082 0\_ |a 324/.097285 |2 19

100 1\_ |a Ruchwarger, Gary.

245 10 |a People in power : |b forging a grassroots democracy in Nicaragua / |c Gary Ruchwarger.

260 \_\_ |a South Hadley, Mass. : |b Bergin & Garvey Publishers, |c 1987.

300 \_\_ |a xi, 340 p. : |b map ; |c 24 cm.

500 \_\_ |a Includes index.

504 \_\_ |a Bibliography: p. 328-334.

650 \_0 |a Political participation |z Nicaragua.

651 \_0 |a Nicaragua |x Politics and government |y 1979-1990.

OWN \_\_ |a Training Master DB

### MARC Record Simple View Page

**NOTE:** In a future release, edit options will be provided from the Authority Control Task List page.

- When you have completed your review and/or change, select the **Dismiss** action button. You may also choose to work with multiple records by selecting the row check box in the check box column, choosing **Dismiss Selected**, and clicking **Execute**.

The screenshot shows a 'Profile Details' window with the following information:

Profile	MARC21 Bibliographic	Family	MARC
Type	Bibliographic	Usage	BIB_MMS
Tag	856	Repeatable	Yes
Subfield	a	Repeatable	Yes

Below the table, there is a 'Choose Controlled Vocabulary' dropdown menu set to 'Locally Defined'. A message states 'No records were found'. At the bottom, there is a 'Create New CV Value' button and a form with 'Code' and 'Description' input fields and an 'Add' button.

### Assign Controlled Vocabulary

- Select a controlled vocabulary (CV) from the drop-down list and click **Assign**. The options in this list are configured in [Configuring Controlled Vocabulary Registry](#).
- For your convenience, you may use the **Create New CV Value** section to add controlled vocabulary terms. The terms that you add here only apply to the field that you are editing. If you want to use these terms with another/different field, use the Controlled Vocabulary Registry (refer to [Configuring Controlled Vocabulary Registry](#)) to create a CV that may be used for more than one field.

To add a new controlled vocabulary value in the **Create New CV Value** section, enter a code and description and click **Add**. When you are finished adding terms, click **Assign**.

- First Indicator – Make any required changes.
  - Second Indicator – Make any required changes.
5. Click **Save**. The field changes are saved in the metadata profile.
  6. Click **Deploy**.

## New for April!

### *Controlling the Display and Access of Global Authorities in the MD Editor*

Support is provided for controlling which global authorities can be viewed and/or accessed in the MD Editor. Metadata configuration options in Resource Management allow you the capability to tailor the display of authority options when working in the MD Editor. With this capability, you can limit the display of options to only the vocabularies that you commonly use versus all that might be available.

---

**NOTE:** This capability is specific to institutions that have had their authority usage policy configured for local authorities.

---


#### To change global authority display/access in the MD Editor:

1. Open the Metadata Configuration List page ([Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration](#)). The Metadata Configuration List page appears.


Metadata Configuration List [Back](#)

---

**Active Profiles**


Columns ▾  Tools

Profile	Family	Type
1 MARC21 Authority	MARC21	Authority
2 MARC21 Bibliographic	MARC21	Bibliographic
3 MARC21 Holding	MARC21	Holding
4 Qualified Dublin Core	DCMI	Bibliographic
5 UNIMARC Authority	UNIMARC	Authority
6 UNIMARC Bibliographic	UNIMARC	Bibliographic


 Tools

---

**Authority Vocabularies**

Add local Authority Columns ▾  Tools

	Vocabulary Name	Managed Locally	Managed in Community	
1	BARE			<a href="#">View hidden</a>
2	CC Lincoln			<a href="#">Actions</a>
3	CSH			<a href="#">View hidden</a>
4	German Classification Method			<a href="#">View hidden</a>
5	German National Library Names and Subjec			<a href="#">View hidden</a>
6	lacnaf			<a href="#">View hidden</a>
7	lcmpt			<a href="#">View hidden</a>
8	Library of Congress name authority recor...			<a href="#">View hidden</a>
9	Library of Congress Subject Headings			<a href="#">View hidden</a>
10	ML_ID			<a href="#">Actions</a>
11	NLI			<a href="#">View hidden</a>
12	REO			<a href="#">View hidden</a>
13	U.S. National Library of Medicine, Medic...			<a href="#">View hidden</a>
14	UNAME			<a href="#">Actions</a>

Add local Authority  Tools

[Back](#)

### Metadata Configuration List Page

The Metadata Configuration List page has the following sections:

- Active Profiles
- Authority Vocabularies

Each section contains a Columns drop-down list to filter the columns that display on this page. When columns have been filtered from view, the **View Hidden** actions button appears. For rows with local vocabularies, the button is labeled **Actions** and, in addition to the **View Hidden** options, contains other actions that you can perform.

Key to this capability is the **Managed Locally** column that allows you to identify which vocabularies are locally managed and activate them for display in the MD Editor (and the Import profile). To supplement this column, is the **Managed in Community** column that identifies the vocabularies that are maintained in the Community

Zone and updated automatically using the existing harvesting process. This column is for informational purposes only; there is no option to activate/deactivate the check marks.

2. Select the check marks in the Managed Locally column to identify the vocabularies that you want displayed in the MD Editor (and the Import profile). The vocabularies that you select display in the **Templates** and **Records** tabs in the MD Editor and the **File > New** record options. These selections also determine which vocabularies appear in the drop-down list for the **Vocabulary code** parameter on the Import Profile Details page.

## Editing MARC-Based Profiles with Extension Packs

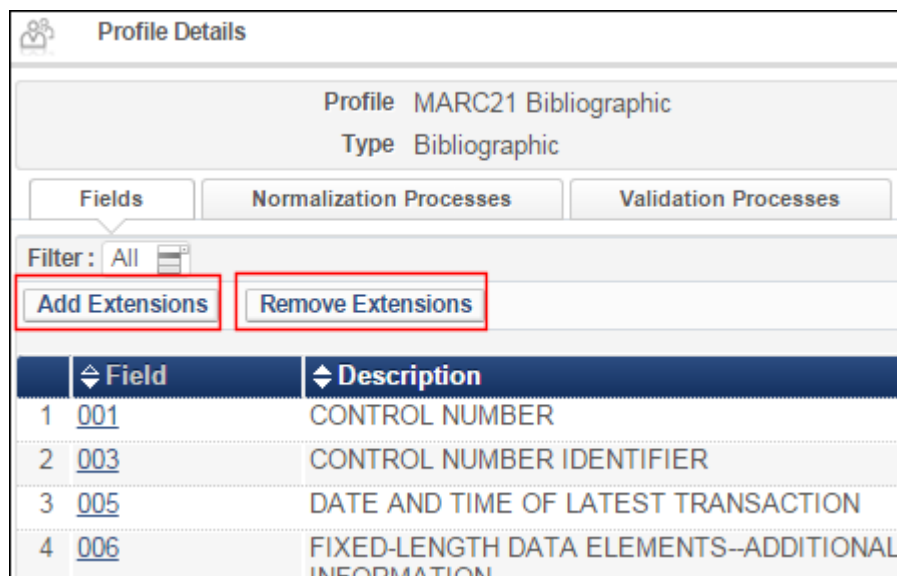
Extension packs for the metadata profiles enable you to adapt MARC-based bibliographic, holdings, and authority profiles with additional fields, subfields, and indicator values, repeating/nonrepeating and mandatory/nonmandatory specifications and URLs for online help for regional needs. This includes the MARC 21, UNIMARC, and KORMARC profiles (but not Dublin Core). With these MARC profile extension packs, you can load and use regional adaptations to the MARC standard.

See [Extension Pack .xsd](#) for the extension pack schema and the [Extension Pack .xml File Example](#) for additional information and an example .xml file.

### To add an extension pack:

1. Create a .xml extension file (see [Extension Pack .xml File Example](#) for more information).
2. Click the link for the profile you want to extend on the Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration**).

For this example, the **MARC21 Bibliographic** link is used. The Profile Details page appears with the **Add Extensions** and **Remove Extensions** buttons.



Profile Details

Profile MARC21 Bibliographic  
Type Bibliographic

Fields   Normalization Processes   Validation Processes

Filter: All

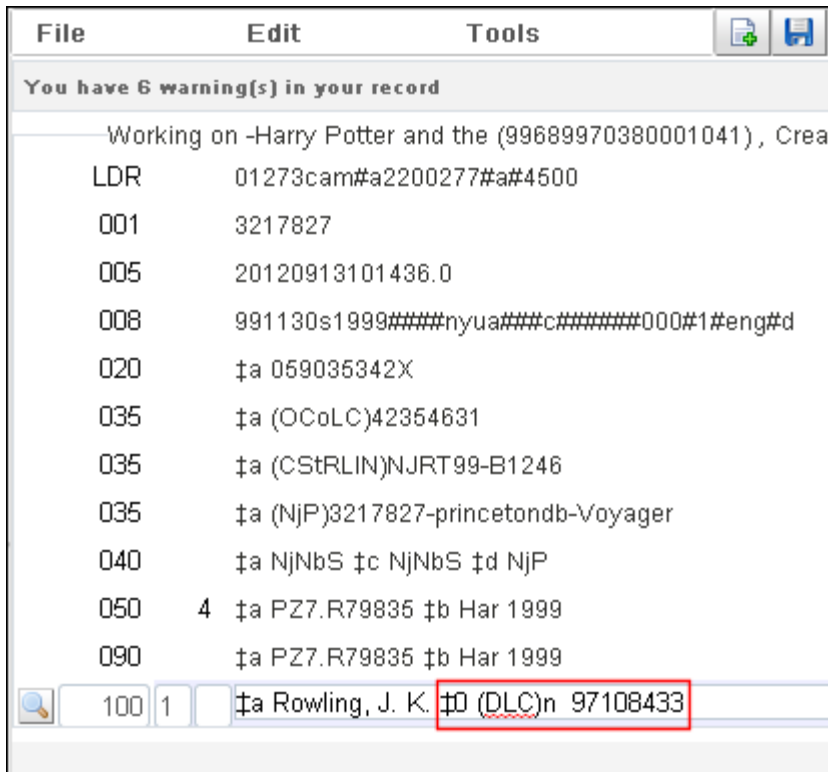
**Add Extensions**   **Remove Extensions**

Field	Description
1 <a href="#">001</a>	CONTROL NUMBER
2 <a href="#">003</a>	CONTROL NUMBER IDENTIFIER
3 <a href="#">005</a>	DATE AND TIME OF LATEST TRANSACTION
4 <a href="#">006</a>	FIXED-LENGTH DATA ELEMENTS--ADDITIONAL INFORMATION

Profile Details Page with Add/Remove Extensions Buttons

3. Click **Add Extensions**. The Add Extensions File page appears.

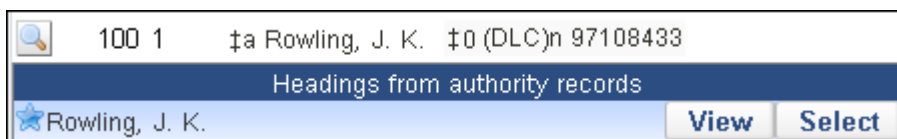
\$0 is automatically added to the control field from which you initiated this process with the originating system ID pulled from the authority record's 035 \$a.



**\$0 Created**

5. Save your bibliographic record.

Now that this control field contains \$0, pressing F3 displays only the authority record with the originating ID that is stored in \$0.



**Only the Authority Record with the Originating ID stored in \$0 is Displayed**

## New for April!

### Authority Control Based on Multiple Authority Identifiers in a Bibliographic Record

For institutions that require the ability to link bibliographic to authority headings using a direct ID that is not necessarily the originating system ID and with multiple system IDs specified, Alma provides support to accomplish

this with the **Direct ID Prefix** in the Metadata Configuration (**Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration**).

For more information about configuring the **Direct ID Prefix**, see [Adding a Local Authority Definition](#) on this page.

Specifically, this is designed for bibliographic records with the linking record ID identified in \$0 of the 650 field (see the illustration below) and the matching ID located in the 035 \$a of the authority record (see the illustration below). This capability provides support for instances where the 650 field may contain more than one \$0 where the intent is to specify linking system IDs for different systems.

650 07 |a Finanzwirtschaft. |0 (DE-588)4017214-4. |2 gnd

#### Bibliographic Record with 650 \$0

Title	Finanzwirtschaft
MMS ID	98233387020000041
Originating system	GND
Originating system ID	040172147
Export to Libraries	No
Australia	
LDR	01722nz a2200373n 4500
001	98233387020000041
005	20141126145231.0
008	880701n  azznnaabn   ana  c
024	7_  a http://d-nb.info/gnd/4017214-4  2 uri
035	__  a (DE-101)040172147
035	__  a (DE-588)4017214-4
035	__  z (DE-588c)4017214-4  9 v:zg
035	__  a (DE-101)040172147

#### Authority Record with 035 Matching System ID to the Bibliographic 650 \$0 ID Above

Based on the **Direct ID Prefix** that you specified in the Metadata Configuration, the system looks for a prefix match and then looks for an originating system ID match. In the above illustrations, the bibliographic record 650 \$0 prefix/originating system ID, (DE-588)4017214-4, matches the authority record 035 \$a (the second 035 entry).

When you are working with bibliographic records in the MD Editor and you enter 650 \$0 with a valid prefix and record ID and click the **Save** icon, the system looks for an authority record that has a matching 035 \$a. When a match is found, it displays a linking icon (to the left of the 650 record) indicating that it has linked to an authority record. Click the linking icon to open the authority record in the split screen.

Alma has attempted to link the bib headings to authority records while loading the record. Loading the record was therefore slower. You have 1 warning(s) in your record

Working on -Test Multiple id (99257297384101671) , Created by exl\_impl (03/15/2016 05:04:40 PDT)

LDR	00335nam#a2200121#u#4500
001	99257297384101671
005	20160315074436.0
008	160315s2013###xx#####r#####000#0#eng#d
100	⌘a David ⌘0 no2009124422
245	1 0 ⌘a Test Multiple id
650	7 ⌘a txt ⌘2 MV ⌘0 (INV)1234 ⌘0 11111 ⌘0 22222 ⌘0 (EXL)5678
650	7 ⌘a Direct
650	7 ⌘a text ⌘2 GND ⌘0 (DE-588)4828986-3

Authority(98234196700000041) Bibliographic Records(1)

Captcha (98234196700000041)

LDR	00875nz##a2200241n##4500
001	98234196700000041
005	20160315143156.0
008	050531n  jazznnaabn##### ana#### c
024	7 ⌘a http://d-nb.info/gnd/4828986-3 ⌘2 un
035	⌘a (DE-101)975086057
035	⌘a (DE-588)4828986-3
035	⌘z (DE-588c)4828986-3 ⌘9 v:zg
035	⌘a (DE-101)975086057
040	⌘a DE-101 ⌘9 r:DE-101 ⌘b ger ⌘d 1150 ⌘e rakv
065	⌘a 30 ⌘2 sswd
079	⌘a g ⌘b s ⌘c 1 ⌘q s ⌘u w
083	0 4 ⌘a 006.3 ⌘9 d:1 ⌘9 t:2010-06-08 ⌘2 22/ger
150	⌘a Captcha
450	⌘a Completely automated public Turing-Test to
550	⌘0 (DE-101)970512546 ⌘0 (DE-588)4770569-3
	allgemein
670	⌘a Wikipedia
679	⌘a Vollautomatischer Turing-Test, um Compute
913	⌘S swd ⌘i s ⌘a Captcha ⌘0 (DE-588c)4828986-

**Bibliographic 650 \$0 Matching/Linking to the Authority 035 When Saved (Click Linking Icon to View Authority)**

When you are working with bibliographic records in the MD Editor, you can also press F3 from the active 650 field that has no \$0 specified, and the system presents any headings matches that it finds. From the authority headings list, **View** and/or **Select** a headings record (see below).

You have 1 warning(s) in your record - Draft auto-saved at 16:45:21.

Working on -Test Multiple id (99257297384101671) , Created by exl\_impl (03/15/2016 05:04:40 PDT)

650 7 ⌘a Direct id ⌘2 MV Create Authority Record

Headings from authority records

- Direct id linking (Local) View Select

Authority(98257297384001671) Bibliographic Records(1)

Direct id linking (98257297384001671)

LDR	00224nz##a2200097n##4500
008	160315   ac nnbabsn       a na   #d
001	98257297384001671
005	20160315053643.0
035	⌘a (INV)1234
035	⌘a (EXL)5678
150	⌘a Direct id linking

**View the Authority Headings Record**

You have 1 warning(s) in your record - Draft auto-saved at 16:45:21.

Working on -Test Multiple id (99257297384101671) , Created by exl\_impl (03/15/2016 05:04:40 PDT)

650 7 ⌘a Direct id ⌘2 MV Create Authority Record

Headings from authority records

- Direct id linking (Local) View Select

**Select the Authority Headings Record**

When you Select a headings record, the matching authority record 035 \$a value is copied to the bibliographic record's 650 \$0. If there is no 035 \$a value, the system copies the standard record ID number to \$0.

Field	Value
LDR	00335nam#a2200121#u#4500
001	99257297384101671
005	20160315074436.0
008	160315s2013###xx#####r#####000#0#eng#d
100	1a David \$0 no2009124422
245	1 0 1a Test Multiple id
650	7 1a txt \$2 MV \$0 (INV)1234 \$0 11111 \$0 22222 \$0 (EXL)5678
650	7 1a Direct id linking 10 (EXL)5678 \$2 MV
650	7 1a text \$2 GND \$0 (DE-588)4828986-3

Authority Headings Record 035 \$a Value Copied to 650 \$0

## New for April!

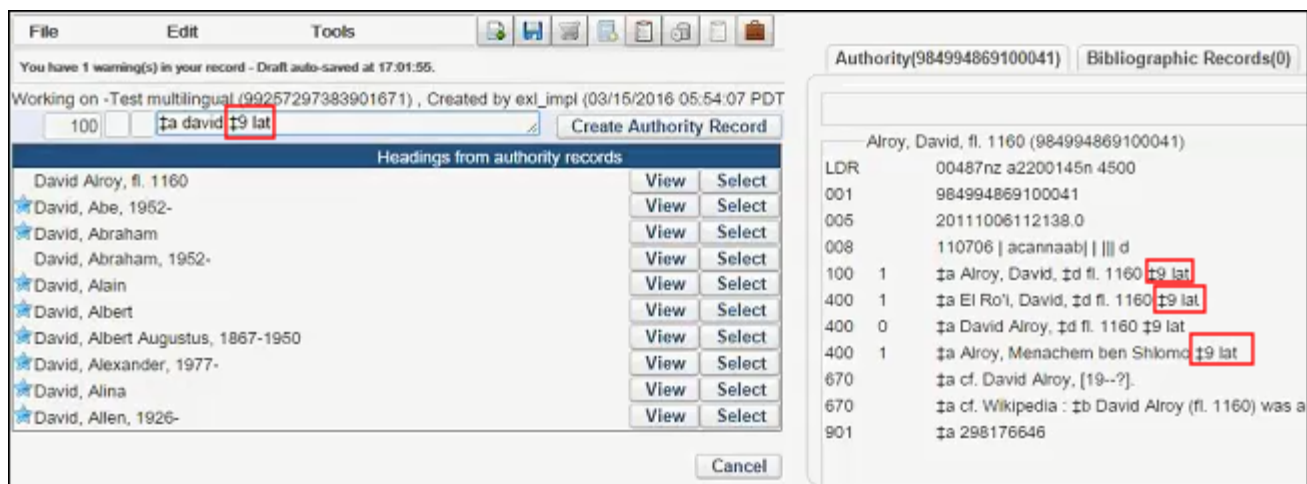
### Working with Multilingual Authority Record Preferred Terms

Alma provides the capability for institutions to work with authority records that have preferred, non-preferred, and related terms in more than one language. This has been implemented in the following manner:

- The **Multilingual** parameter needs to be set to **Yes** for authority records. For local authority records, you need to specify this parameter in the Metadata Configuration. For Community Zone managed authority records, this setting needs to be configured by Ex Libris at the Community Zone level. For more information, see [Adding a Local Authority Definition](#) on this page.
- For MARC 21 records, the language code (such as lat, heb, ara, and so forth) for all preferred, non-preferred, and related terms is entered in \$9.

Field	Value
LDR	00172nam#a2200073#u#4500
001	99257297383901671
005	20160315055407.0
008	160315s2013###xx#####r#####000#0#eng#d
245	1 0 1a Test multilingual
100	1a david \$9 lat
650	7 1a david \$2 NLI \$9 lat
650	7 heb \$2 NLI \$2 תי א

\$9 lat Record Entry



### \$9 lat Headings Display

- For UNIMARC records, the language code for all preferred, non-preferred, and related terms is entered in \$7. Specifically, the system uses positions 5 and 6 of \$7.

200	1	\$\$6 a01 \$7 ba0yga\$y \$8 fregre \$9 0 \$\$a B
200	1	\$\$6 a01 \$7 ba0yba\$y \$8 fregre \$\$a Valaoritis

### Positions 5 and 6 in \$7

- In a multilingual authority record, the preferred term is duplicated for each language. Non-preferred terms are entered as necessary for each language.

```

$$aMaimonides, Moses,$$d1135-1204$$9lat
$$aמִיָּמּוֹן מֹשֶׁה בֶּן מַיְמוֹן,$$d1138-1204$$9heb
$$aموسى بن ميمون,$$9ara
$$aМоше Бен Маймон,$$d1135-1204$$9cyr

```

### Multiple \$9 Entries with Duplicated Terms for Each Language

- When a non-preferred term is used in a bibliographic record, Alma updates the bibliographic record using the preferred term of the same language.
- When F3 is used (from the appropriate bibliographic fields) in the MD Editor to display a list of headings, the headings list is displayed as follows:
  - If there is a language code (specified in the MARC 21 \$9 or the UNIMARC \$7) in the bibliographic record, only the headings that match the language are displayed.
  - If there is no language code specified in the bibliographic record, all of the matching headings in all languages are displayed. The language code in the authority/bibliographic headings records is ignored.
- Validation of records is handled in the following manner:

- For authority records, Alma checks for the **Multilingual** setting. If the **Multilingual** setting is **No**, only one preferred field is allowed in the MARC 21 1XX or the UNIMARC 2XX. If the **Multilingual** setting is **Yes** and there is more than one preferred term, Alma checks for a language indication in the MARC 21 \$9 or the UNIMARC \$7, positions 5 and 6.
- For bibliographic records, validation of \$9 has been enhanced to include \$9 in the fields specified in the table below.

MARC 21 Bibliographic Fields	KORMARC Bibliographic Fields
084	084
382	100-199
440	382
490	440
648	490
650-651	600
654-655	610-619
748	630
751	648
810-819	650-651
830	654-655
	700
	710-719
	730
	748
	751
	800
	810-819

MARC 21 Bibliographic Fields	KORMARC Bibliographic Fields
	830

- Publishing to Primo enriches the bibliographic records with the preferred, non-preferred, and related terms of all languages.



For more information, see the [Multilingual Authority Record Support](#) video (0:48 mins).

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- MD Editor – In the MD Editor, the angle brackets and the text within the brackets appear in the area where cataloging records are entered. However, where text such as a title appears in the MD Editor, the angle brackets are removed (see the examples below).

File	Edit	Tools
Record saved at 15:03:43. You have 14 warning(s) in your record		
Working on <Gli Traducibilit? e (99169029101801081) , Created by exl_in		
LDR		00752nam##2200217###4500
001		99169029101801081
005		20151110080343.0
010		\$\$a 88-7715-715-1
035		\$\$a 000270000
035		\$\$a 000270000
100		\$\$a 20041004d2004----km-y0itay50-----ba
101	0	\$\$a ita
200	1	\$\$a <<Gli>> Traducibilit? e processi traduttivi \$\$a Derek Boothman
210		\$\$a Perugia \$\$c Guerra \$\$d c2004
215		\$\$a 197 p. \$\$d 24 cm

#### Handling of Non-Filing Indicators in the MD Editor (Cataloging and Display)

1	<u>Gli Traducibilit? e processi traduttivi / Derek Boothman</u>
	<b>Book</b> By Adamo,, Stefano. (Perugia Guerra c2004)
	ISBN: 88-7715-715-1
	Subject: Espace a?rien (droit international) -- global -- test1 -- te

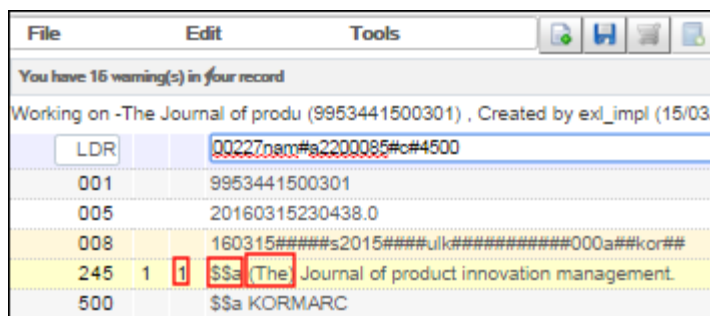
#### Handling of Non-Filing Indicators in Search Results

## New for April!

### Using Non-Filing Indicators in KORMARC

When working with KORMARC records, searching in the Alma repository and browsing headings has been enhanced to include logic for processing records with non-filing indicators and characters. Sorted results lists ignore non-filing characters and when browsing headings, the non-filing characters are ignored. For example, articles such as a, an, and the can be ignored.

In KORMARC, non-filing characters are identified by surrounding the non-filing text in parentheses at the beginning of \$a and an indicator value of 1 in either the first or second indicator position as identified in the table below.

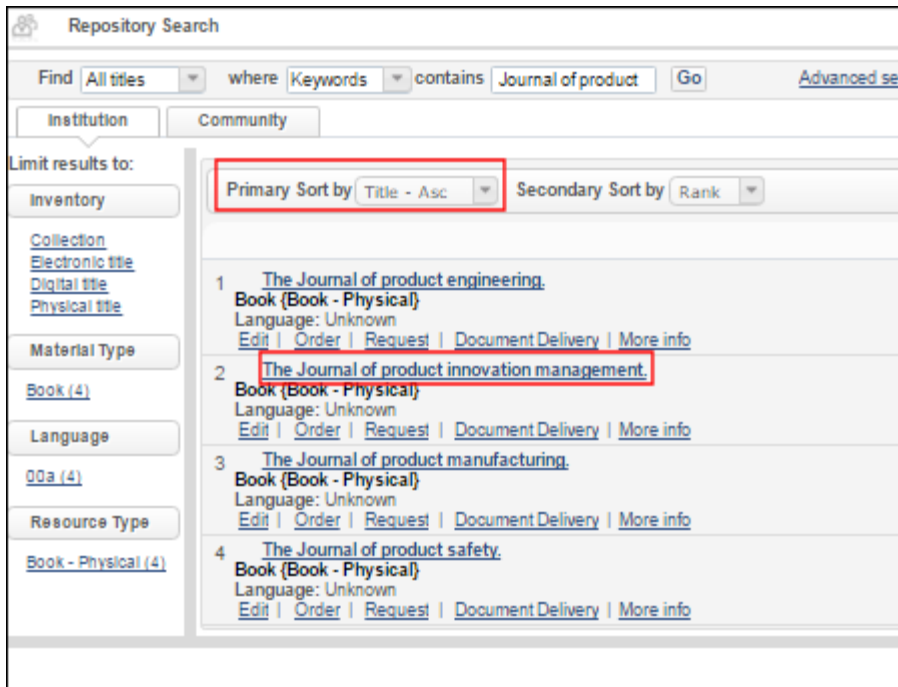


#### KORMARC Bibliographic Record with Non-Filing Characters

Indicator Position	KORMARC Field
1	630, 740
2	130, 222, 240, 242, 243, 245, 440, 490, 730, 830

Even though the non-filing characters are ignored for sorting purposes, the system displays the complete entry. For example:

- Record: 245 11 \$\$a (The) Journal of product innovation management.
- Sort: Journal of product innovation management.
- Display: The Journal of product innovation management.



#### Sorted KORMARC Results with Non-Filing Characters

Using the same KORMARC record example above, the result **The Journal of product innovation management.** is returned when any of the following searches have been specified:

- Keyword search contains **the** or **journal**
- Search phrase contains **the journal of product** or **journal of product**
- Search starting with contains **the journal of product** or **journal of product**

■

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## Contributing to the Community Zone - Normalization, Merge, and Indication Rules

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**PERMISSIONS:** To share rules in the Community Zone, you must have one of the following roles:

- Cataloger
- Cataloger Extended
- Catalog Manager
- Catalog Administrator

### New for April!

Contribution privileges that can be activated by Support have been added for the cataloging roles identified above. Contact Support to have the **Contributor** privilege activated for these roles per your requirements.

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In the Alma Community Zone, a dedicated area is provided for sharing normalization, indication, and merge rules between institutions. From the Rules tab in the MD Editor, private or shared rules can be contributed to the Community Zone.



For more information, see [Contributing Normalization Rules to the Community Zone](#) (3:09 min.).

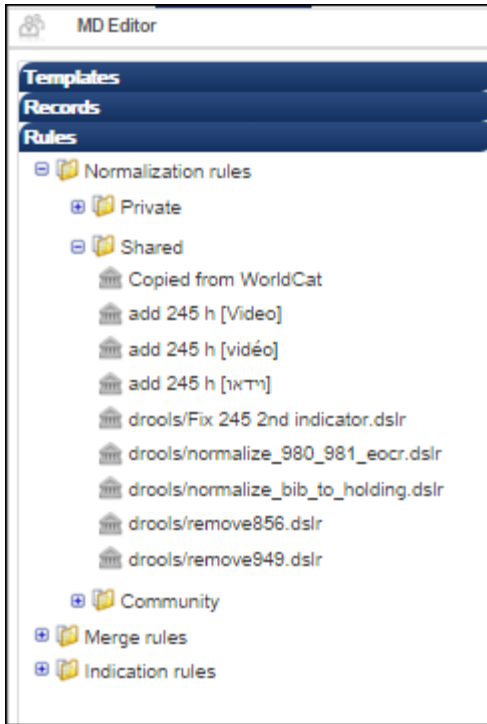
---

## Sharing Rules in the Community Zone

This section describes how to share normalization rules in the Community Zone. These same steps can be applied to merge rules and indication rules since they are shared in a similar manner.

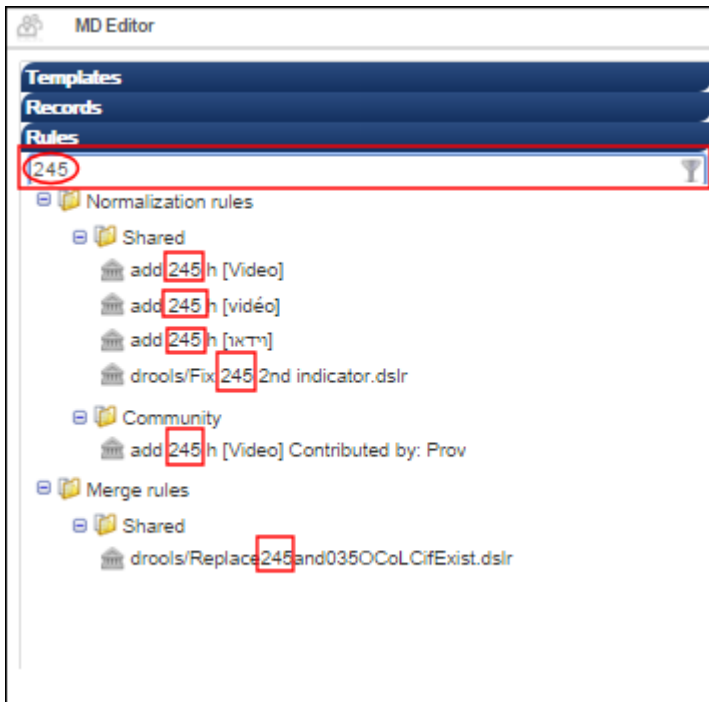
### To share normalization rules in the Community Zone:

1. Open the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).
2. Select the **Rules** tab, expand the **Normalization rules** folder, and expand the **Private** or **Shared** folder where the rule that you want to share in the Community Zone is located.



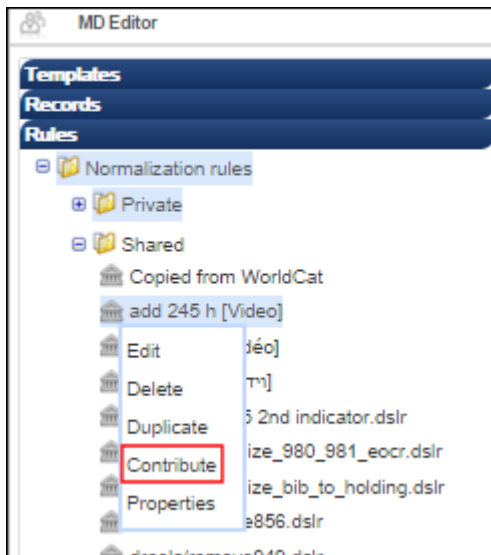
**MD Editor Rules Tab with Expanded Normalization Rules Folder**

3. Locate the rule that you want to contribute. Use the filtering capability to display a shorter list of rules from which to choose.



## New for April! Filtering Rules

4. Select the rule to be shared in the Community Zone. The list of actions that can be performed appears.



### Rules Actions

5. Select **Contribute** to share the rule in the Community Zone. The Rule Sharing dialog box appears.

The **Name** parameter is required and needs to be unique. If the system finds another rule by the same name in the Community Zone, it will apply a numeric suffix (Contributed 1, Contributed 2, Contributed 3 and so forth) to make the name unique.

Even though the following parameters are optional, they provide key pieces of information that enable the most effective use of the shared rule and should be completed as part of your best practices for rule sharing:

- Description
- Contact name
- Contact email

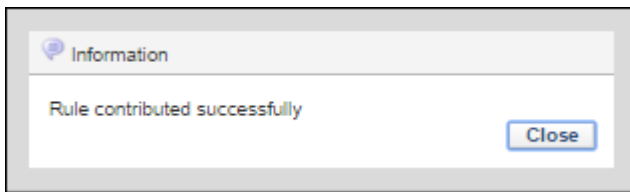
The **Contact name** and **Contact email** parameters are automatically prefilled in the Rule Sharing dialog box with the user's information (or you can manually override this with other contact name/email information)

**New for April!** Contact Name and Contact Email Automatically Filled In

When rules are stored in the Community Zone, other users can see this information. A full, detailed description can enable interested users in determining/confirming whether a rule meets their needs without having to open and review the rule details. The Description parameter can be a maximum of 4,000 characters in length.

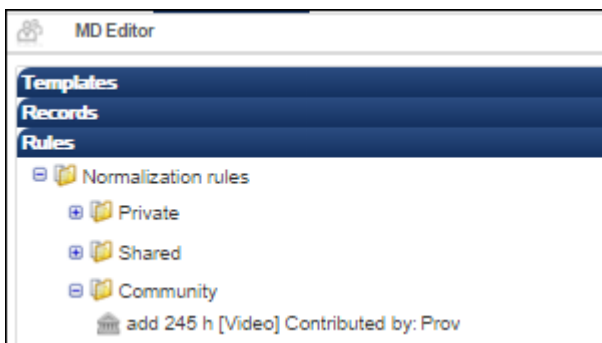
Providing contact information enables users to collaborate, perhaps, to develop extensions to a rule or provide notification if a rule becomes broken.

6. Click **OK**. A confirmation message appears when a rule is successfully contributed.



**New for April!** Confirmation Message of Successful Contribution

The rule is copied to the Community Zone and appears in the Community folder when you expand it.



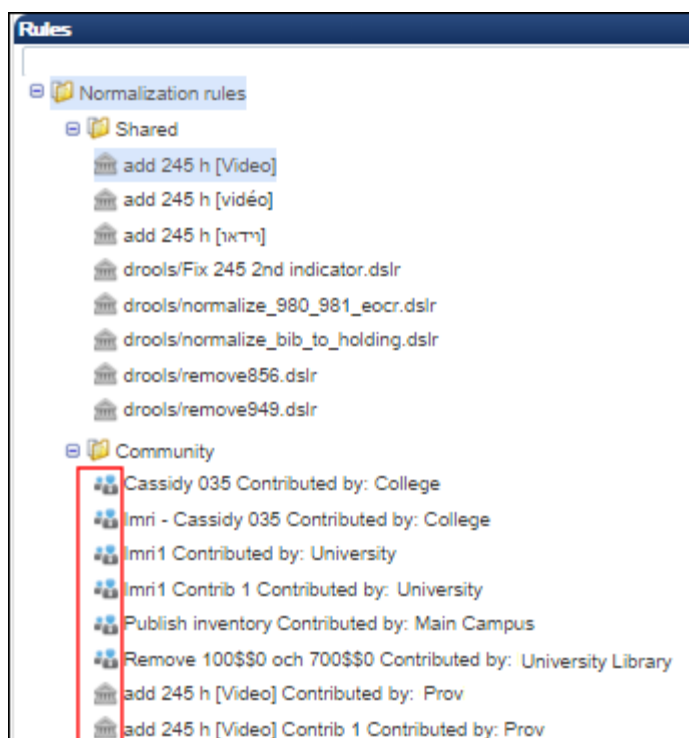
**Shared Rule Appears in the Community Folder**

In the Community folder, the rule is identified with the following components:

- Rule name
- Contrib <numeric suffix>, if required to make the name unique
- Contributed by: <institution name> (For rules contributed by Ex Libris, it displays **Contributed by: Alma Community Zone.**)

### To copy a shared normalization rule from the Community Zone:

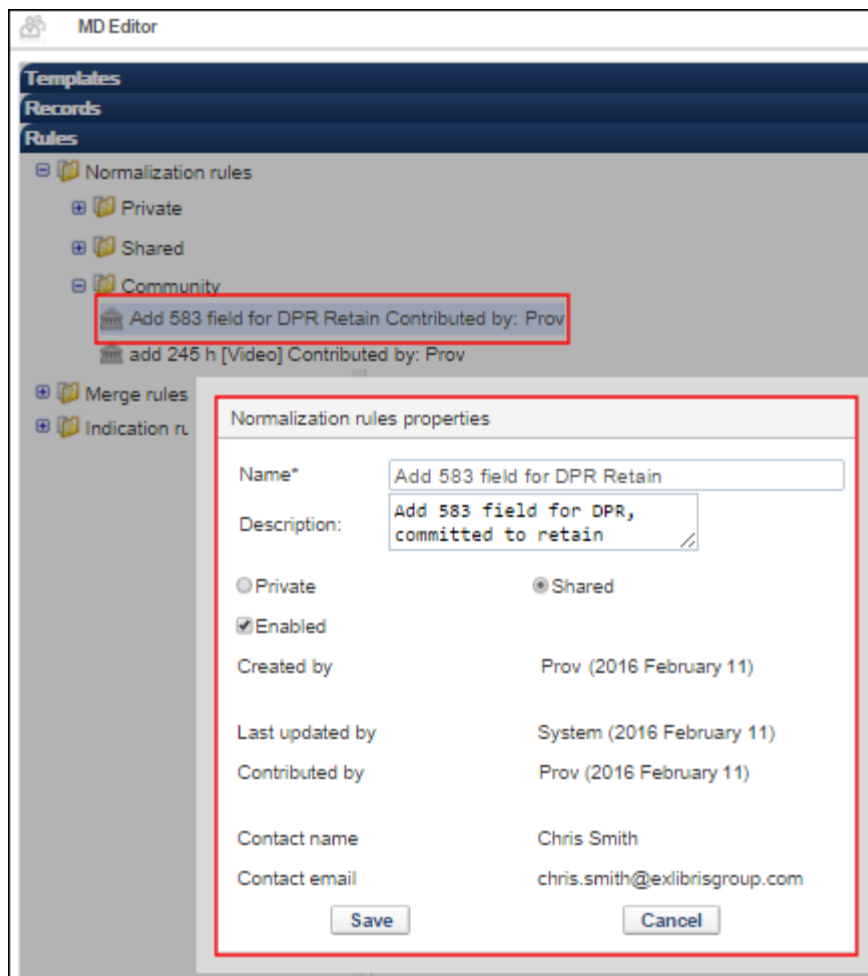
1. Expand the **Community** folder in the **Normalization rules** folder under the **Rules** tab in the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).
2. Select the rule that you want to use. When you point to the rule, the Description for the Rule appears. This provides additional information to help you identify the rule that you want to copy. The system also uses distinguishing icons to help you identify which rules displaying in the Community folder were created locally by your institution or are rules from the Community Zone created by a different institution.



## New for April! Community and Institution Icons

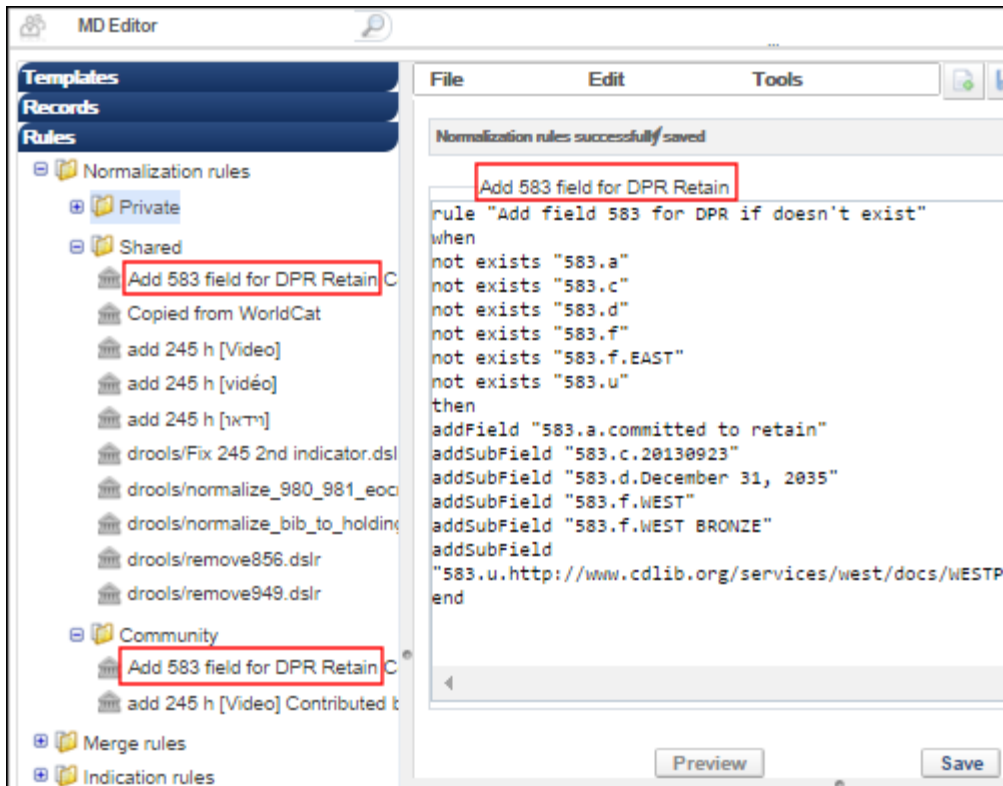
3. Click **Copy** from the list of actions. The Normalization Rules Properties dialog box appears. In addition to the rule name and description, the properties provide the following information:
  - Name of the institution that created and contributed the rule
  - Contact name and email address for the contributed rule

- Date that the rule was last updated



**Copy Normalization Rule from the Community Zone**

4. Select from the **Private**, **Shared**, and **Enabled** options to identify the attributes for the rule after it is copied from the Community Zone to your institution.
5. Click **Save**. The rule opens in the MD Editor working space.



Copy of the Normalization Rule from the Community Zone Opens in the MD Editor

6. Click **Save**.

In addition to the **Copy** action:

- If you are the contributing institution, you have the option to **Delete** the rule from the Community Zone

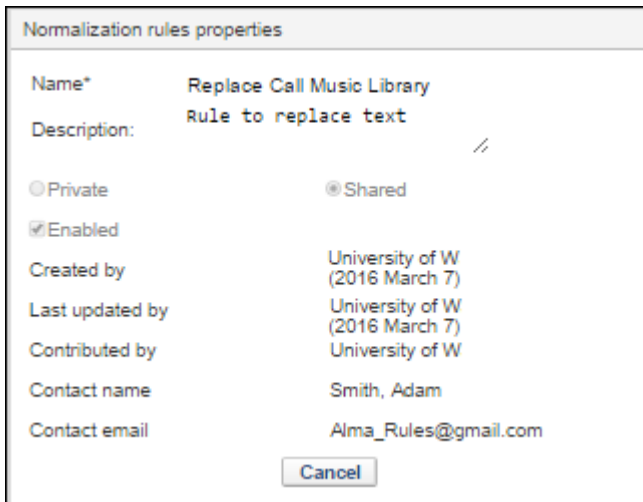
If you try to delete a contributed normalization rule from the Community Zone and it is being used by any other process, import profile, and so forth, there is a validation check that prevents it from being deleted and a pop-up message appears indicating that the normalization rule cannot be deleted and that you need to remove the related process first.

For institutions that have a copy of a rule that is subsequently deleted from the Community Zone, the copy may continue to be used as if it was one created by the institution.

- All institutions have the **View** action option
- **New for April!** A **Properties** action is available for viewing a rule's properties from the Community Zone.



**Properties Option for the Community Folder**



**Community Folder Rule Properties**

In a collaborative environment, if you would like to copy normalization rules from the Community Zone to the Network Zone and not the Institution Zone, copying should be done in the Network. That is, from the Network system, you need to perform the **Copy** action and copy from the Community folder to the Shared folder in that system. When copied in this manner, the Network copy appears in the Shared folder of the member institutions.

## New for April!

Other miscellaneous enhancements provided in the April 2016 release are:

- Tooltips include **Contributed by** information in addition to the rule name
- Unneeded labels (**Contributed by**, **Contact name**, and **Contact email**) have been removed from the new rule dialog box in the MD Editor (**File > New > Normalization rules**, **File > New > Merge rules**, and **File > New > Indication rules**)

## Configuring Representation Label Templates

### New for April!

You can create a template that can be used to create a label for partial representations. These representations are used when a bibliographic record is not fully represented by a single representation. For more information, see [Editing Representation Metadata and Content](#).

#### To create representation label templates:

1. From the Representation Label Template Rules page (**Resource Management > Resource Configuration > Configuration Menu > General > Representation Label Templates**), click **Add Rule**. The following appears:

Representation Label Template Setup Editor
Cancel Save

**Representation Label Template Setup**

Name \*

Description

Created By Ex Libris Created On 10/03/2016

Updated By Ex Libris Updated On 10/03/2016

**Input Parameters**

No records were found.

Name	Operator	Value	
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add Parameter

**Output Parameters**

Prefix1	<input type="text"/>	Field1	<input type="text"/>	Suffix1	<input type="text"/>
Prefix2	<input type="text"/>	Field2	<input type="text"/>	Suffix2	<input type="text"/>
Prefix3	<input type="text"/>	Field3	<input type="text"/>	Suffix3	<input type="text"/>
Prefix4	<input type="text"/>	Field4	<input type="text"/>	Suffix4	<input type="text"/>
Prefix5	<input type="text"/>	Field5	<input type="text"/>	Suffix5	<input type="text"/>
Prefix6	<input type="text"/>	Field6	<input type="text"/>	Suffix6	<input type="text"/>
Prefix7	<input type="text"/>	Field7	<input type="text"/>	Suffix7	<input type="text"/>
Prefix8	<input type="text"/>	Field8	<input type="text"/>	Suffix8	<input type="text"/>

Show template

Cancel
Save

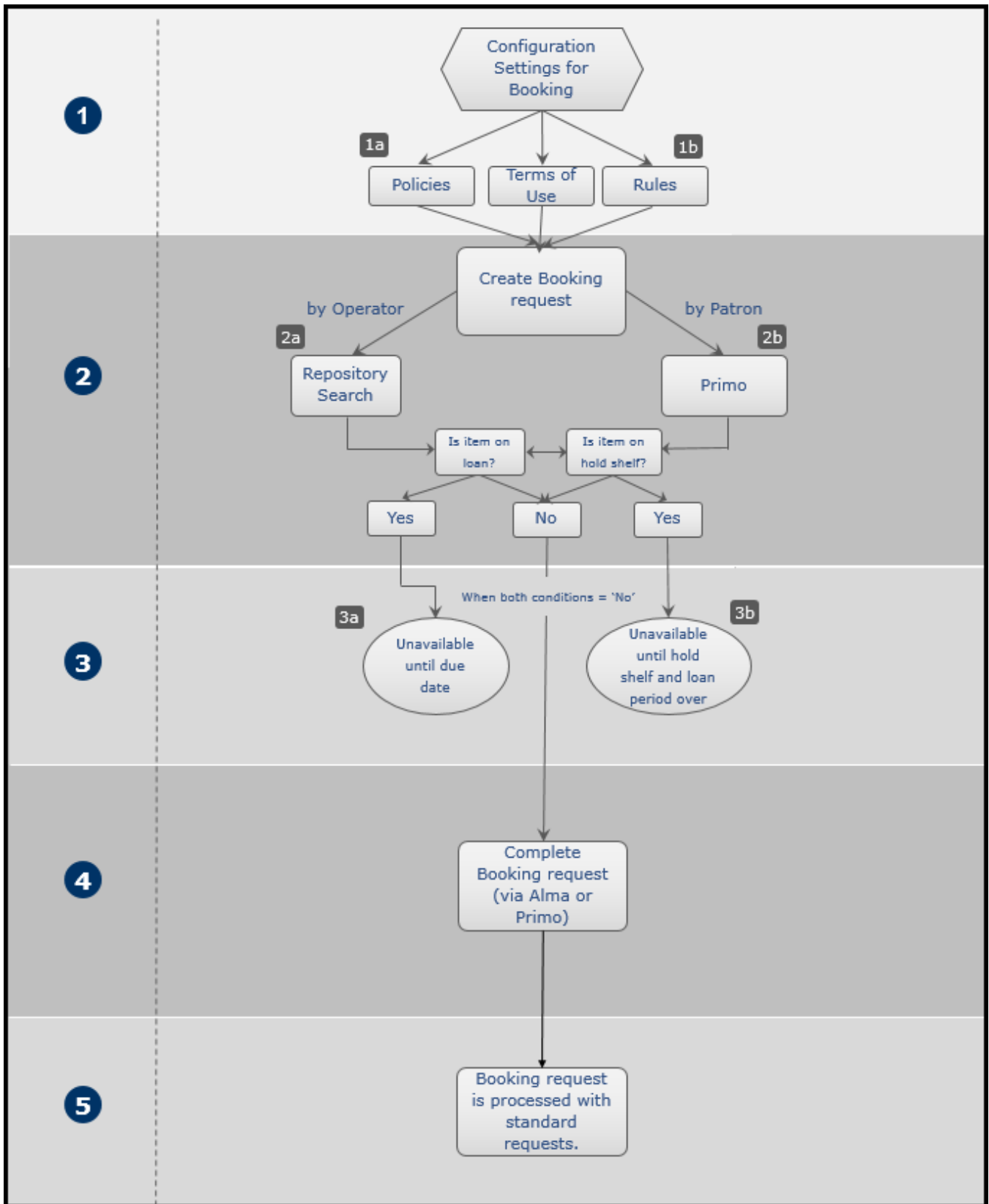
**Representation Label Template Setup Editor**

2. In the Name field, enter a name for your template.
3. In the **Input Parameters** section, select a name, operator, and value from the drop-down lists and click **Add Parameter**.  
Repeat this step as necessary.
4. In the **Output Parameters** section, select fields and enter the prefixes and suffixes you want Alma to use to create the representation labels.
5. Click **Show template** to see an example of how the label will appear.
6. Click **Save**.

The template is available to create labels for partial representations.

## Booking Workflow

The following is an illustration of the booking requests workflow that governs the way the booking process is managed. The workflow outlines the configuration tasks necessary to implement booking requests, as well as the procedure for booking items in Alma.



## Booking Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. Invoke the relevant Booking configuration settings, as follows:
  - a. **Policies** – You create the relevant booking policies to enable parameters for booking requests (see [Configuring Policies](#))
  - b. **Terms of Use** – You create booking terms of use to invoke the configured booking policies (see [Configuring Terms of Use](#))
  - c. **Rules** – You create rules that indicate which booking terms of use are to be applied for the specified fulfillment unit locations (see [To add fulfillment unit rules:](#))
2. Create a booking request using one of the following methods:
  - a. **Repository Search** – Performed by the Fulfillment Services Operator on behalf of a patron
  - b. **Primo** – Performed by a Patron
3. Alma verifies the availability of the item, as follows:
  - a. If the item is on loan, it is unavailable until the item's due date is reached.
  - b. If the item is on the hold shelf, it is unavailable until the hold shelf period is over and the item's due date is reached.

---

**NOTE:** If the item is being processed by a work order, it is unavailable before the work order's end date.

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If the item is neither on loan nor on the hold shelf or processed by a work order, it is available and the booking request can be processed and completed.
4. The booking request is processed and submitted – see step 3 through step 11 in [To create a booking request:](#).
5. **New for April!** The submitted booking request enters the standard request workflow for processing at the shelf. This includes steps for picking up booked items from the shelf and placing them on the hold shelf. If a preview period has been defined in the booking request's terms of use, the workflow process begins from the preview time. Otherwise it begins with the booking time. The booking request is considered active at the point that its workflow process begins. At that point the request will show up in the relevant Pick From Shelf task list if the resource is available, or be activated when the item is scanned in or returned if the resource was not previously available. Requests are considered expired when their booking request end time arrives.

Booking requests will participate in the standard request workflows and can be seen in the Pick from Shelf and Hold Shelf task lists. There is a new facet for the expired hold shelf task list to filter the different request types. When filtering for booking requests, the sort order is by start date/hour, in ascending order. It is not possible to update the expiration of booking requests as the expiration request is the booking end time. Additionally, a booking request may be placed for pickup at another location if the booking terms of use allows that. A booking request has higher priority than a hold request. If a hold request cannot be completed considering the hold shelf period and the loan period, it will not be activated until after the booking request is completed.

## RFID Support

### New for April!

**PERMISSIONS:** To configure an RFID integration profile, you must have the following role:

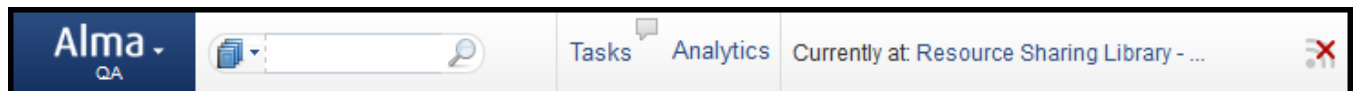
- General System Administrator

RFID readers may be used for scanning item barcodes and for registering their check-out and check-in. The support is currently functional for 3M RFID Staff Workstation 896. After the RFID integration profile is added, a connection icon will appear in the main menu bar as long as a location is selected from the **Currently At** drop-down.



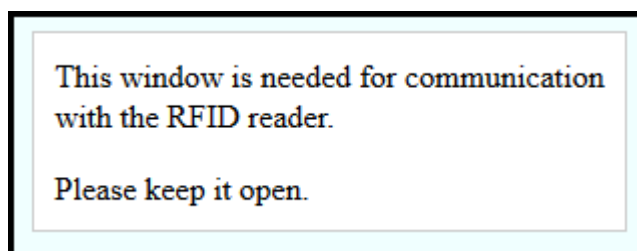
For more information about RFID Support, see the [RFID support](#) video (1:51 mins).

If the RFID connection is not currently active, it will appear as follows.



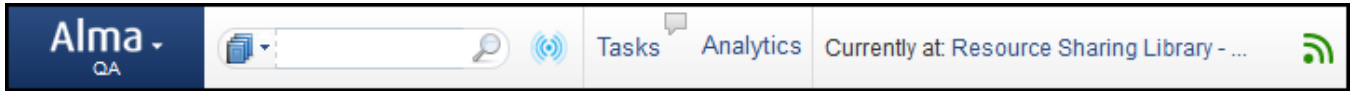
Alma Menu Bar - RFID Disconnected

Clicking on the connection icon will open an RFID communication pop-up window. This enables the communication with the reader and must be left open in order to read from or write to the reader.



RFID Communication Window

The connection icon on the menu bar changes to show that the connection has been made.



#### Alma Menu Bar - RFID Connected

The active connection will be maintained per user and desk/department. When switching to a new desk, you will need to activate the connection again by clicking the connection icon.

Clicking the blue icon next to the search bar will activate the RFID reader to read the barcode of the item that is currently at the counter, and display the item. All input boxes that accept a barcode will show the blue icon as long as the RFID connection is active. These boxes are found in the following locations: Scan In, Return Items, Patron Services, Repository Search, Receive New Material, Physical Item Editor, Quick Cataloging, and Persistent Search (throughout Alma). Additionally, while on a screen that has the icon to read a barcode, the keyboard shortcut, **Alt+A**, will also activate the reader to display the listing.

Using the RFID reader to scan and loan an item will disable the security bit on the RFID tag. Returning the item will re-enable the security tag.

#### To configure the RFID integration profile:

1. Access **Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**. Click **Add Integration Profile**. Enter a code and name for the integration profile.

The screenshot shows a web form titled 'External System' with a progress indicator '1-2' and 'Cancel' and 'Next' buttons. The form has a table header with columns 'Code', 'Name', and 'Integration Type'. Below the header, there is a form for adding a new profile. The 'Code' field contains 'RFID', the 'Name' field contains 'RFID', and the 'Integration Type' is a dropdown menu. There is a 'Default' checkbox which is unchecked, and a large 'Description' text area. At the bottom right of the form are 'Cancel' and 'Next' buttons.

#### Integration Profile – Step 1

2. Select **RFID** from the Integration Type drop-down list.

Integration Profile – Step 1 with RFID Selected

3. Select the RFID system that you are using from the System drop-down list, and click **Next**.
4. Select the **Active** check box to make this an active RFID definition.
5. Enter the URL for the RFID system to which your RFID device is attached.

Integration Profile – Step 2

6. Configure and/or review the following definitions using the links provided:
  - RFID Material Type Definition (see the Configuring the RFID Material Type Definition section below)

- RFID Item Policy Definition (see the Configuring the RFID Item Policy Definition section below)
- Mapping of RFID Fields to Alma Fields (see the Mapping the RFID Fields to Alma Fields section below)

7. Click **Save**.

For more information on configuring RFID, see <https://developers.exlibrisgroup.com/alma/integrations/rfid>.

## Configuring the RFID Material Type Definition

Since the RFID reader requires numeric content (that varies among RFID vendor implementations), the RFID Material Type code table provides you the ability to map alphabetic material type codes that you currently have defined in Alma to numeric values.

### To configure the RFID Material Type code table:

1. Click the **RFID Material Type Definition** link in your RFID Integration Profile. The RFID Material Type code table page appears.

### RFID Material Type Code Table Configuration

In a Network environment, the **Manage Table in Network** options appear.

<a href="#">Cancel</a> <a href="#">Translate</a> <a href="#">Manage Table in Network</a> <a href="#">Save</a>
<a href="#">Organization Unit List</a>
<p>Table Name RFID MaterialType  Updated on 03/03/2016  Managed in Network No  Table code RfidMaterialType</p>

**RFID Material Type Code Table Configuration in the Network - Manage Table in Network Button**

<a href="#">Cancel</a> <a href="#">Translate</a> <a href="#">Stop Network Management</a> <a href="#">Save and Distribute</a> <a href="#">Save</a>
<a href="#">Organization Unit List</a>
<p>Table Name RFID MaterialType  Updated on 03/03/2016  Managed in Network Yes  Table code RfidMaterialType</p>

**RFID Material Type Code Table Configuration in the Network - Save and Distribute/Stop Network Management**

2. In the Create a New Code Table Row section, select one of the existing material type codes from the **Code** drop-down list, enter a numeric value for the **Description** (mandatory), and click **Add Row**. Continue adding rows for each Alma material type to which you want to assign a numeric value for the RFID reader.

Code Table Cancel Translate Save

You are configuring: QA - Provisioning [Organization Unit List](#)

**Table Information**

Sub System: INVENTORY      Table Name: RFID MaterialType  
 Updated By: admin              Updated on: 24/03/2016  
 Patron Facing: No              Table Description: Material Type codes  
 Table code: RfidMaterialType

**Material Type codes**

Filter: English

Import Tools

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Book	01	01	<input type="radio"/>	admin	24/03/2016	Delete
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	DVD	02	02	<input type="radio"/>	admin	24/03/2016	Delete
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	Master Thesis	03	03	<input type="radio"/>	admin	24/03/2016	Delete
<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	Video Recording	04	04	<input type="radio"/>	admin	24/03/2016	Delete

**Create a New Code Table Row**

Quick Add

Code: Letter      Description:       Default Value: No      Add Row

**RFID Material Type Rows Added**

3. Click **Customize** (or **Save** if you have previously edited this code table).

## Configuring the RFID Item Policy Definition

Since the RFID reader requires numeric content (that varies among RFID vendor implementations), the RFID Item Policy code table provides you the ability to map alphabetic item policy codes that you currently have defined in the system to numeric values.

**To configure the RFID Item Policy code table:**

1. Click the **RFID Item Policy Definition** link in your RFID Integration Profile. The RFID Item Policy code table page appears.

The screenshot shows the 'Code Table' configuration window for 'RFID Item Policy'. The window title is 'Code Table' with 'Cancel' and 'Customize' buttons. Below the title bar, it indicates 'You are configuring: QA - Provisioning' and provides a link to 'Organization Unit List'. The 'Table Information' section displays: Sub System: INVENTORY, Table Name: RFID Item Policy, Updated By: -, Updated on: -, Patron Facing: No, Table Description: Item-Policy codes, and Table code: RfidItemPolicy. Below this is a section for 'item-Policy codes' with a filter set to 'English'. A message states 'No records were found.' At the bottom, there is a 'Create a New Code Table Row' section with a 'Quick Add' form. The form has three fields: 'Code' (with a dropdown menu showing 'atlas'), 'Description' (an empty text box), and 'Default Value' (with a dropdown menu showing 'No'). An 'Add Row' button is located to the right of the 'Default Value' field.

### RFID Item Policy Code Table Configuration

In a Network environment, the **Manage Table in Network** options appear.

This screenshot shows the same 'Code Table' configuration window, but with additional network management options. The title bar now includes 'Cancel', 'Translate', 'Manage Table in Network', and 'Save' buttons. The 'Table Information' section shows: Table Name: RFID Item Policy, Updated on: 03/03/2016, Managed in Network: No, and Table code: RfidItemPolicy. The 'Manage Table in Network' button is highlighted in red.

### RFID Item Policy Code Table Configuration in the Network - Manage Table in Network Button

This screenshot shows the 'Code Table' configuration window with the 'Managed in Network' status changed to 'Yes'. The title bar now includes 'Cancel', 'Translate', 'Stop Network Management', 'Save and Distribute', and 'Save' buttons. The 'Table Information' section shows: Table Name: RFID Item Policy, Updated on: 03/03/2016, Managed in Network: Yes, and Table code: RfidItemPolicy. The 'Stop Network Management' and 'Save and Distribute' buttons are highlighted in red.

### RFID Item Policy Code Table Configuration in the Network - Save and Distribute/Stop Network Management

2. In the Create a New Code Table Row section, select one of the existing item policy codes from the **Code** drop-down list, enter a numeric value for the Description (mandatory), and click **Add Row**. Continue adding rows for each Alma item policy to which you want to assign a numeric value for the RFID reader.

Code Table Cancel Customize

You are configuring: QA - Provisioning [Organization Unit List](#)

**Table Information**

Sub System: INVENTORY      Table Name: RFID Item Policy  
 Updated By: -      Updated on: -  
 Patron Facing: No      Table Description:   
 Table code: RfidItemPolicy

**Item-Policy codes**

Filter:

**Tools**

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	4 day Loan	01	01	<input type="radio"/>	admin	24/03/2016	Delete
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="2"/>	1 hour loan	02	02	<input type="radio"/>	admin	24/03/2016	Delete
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="3"/>	photocopy	03	03	<input type="radio"/>	admin	24/03/2016	Delete
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="4"/>	map stacks	04	04	<input type="radio"/>	admin	24/03/2016	Delete

**Create a New Code Table Row**

**Quick Add**

Code:       Description:       Default Value:  Add Row

**RFID Item Policy Rows Added**

3. Click **Customize** (or **Save** if you have previously edited this code table).

## Mapping the RFID Fields to Alma Fields

The **Mapping of RFID Fields to Alma Fields** link displays the RFID Fields mapping table settings. The settings on this page determine what information is written to the RFID tag. From this page, you can see which fields are enabled to be written to the RFID tag. In addition, you can see one of the following Alma field settings that has been mapped to each of the RFID tag fields:

- Barcode
- Call number
- ISSN / ISBN
- Is magnetic
- Item policy
- Library code
- Location
- Material type
- N/A
- Pieces
- Title

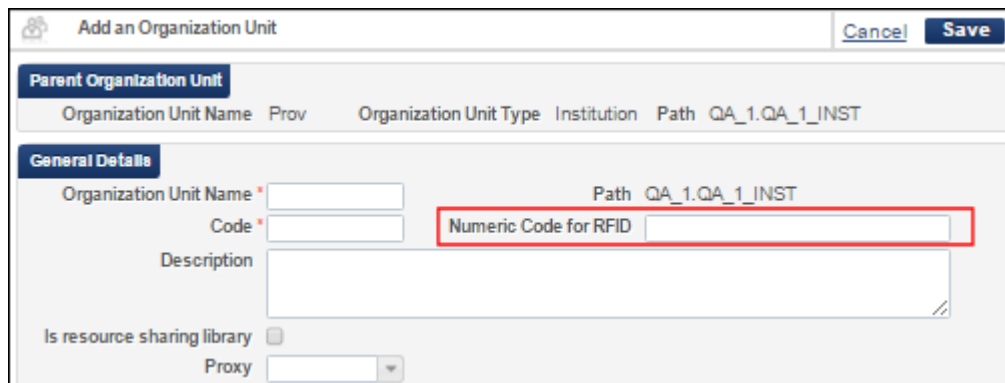
## Alma Fields that can be Mapped

If you need to customize the field mapping or which fields are enable to be written to the RFID tag, contact Support for assistance.

---

## Configuring Library Codes for RFID

Since the RFID reader requires numeric content (that varies among RFID vendor implementations), the Alma library configuration (**Administration > General Configuration > Configuration Menu > Libraries section > Add a Library or Edit Library Information**) provides a parameter for specifying a numeric code value in addition to the alphanumeric code used within Alma. For example, the 3M LibraryID parameter requires a numeric (integer) value. The **Numeric Code for RFID** parameter needs to be configured in order to write RFID content.



The screenshot shows the 'Add an Organization Unit' form. The 'General Details' section is expanded, showing the following fields:

- Organization Unit Name \*
- Code \*
- Numeric Code for RFID (highlighted with a red box)
- Description
- Is resource sharing library
- Proxy

The 'Path' is set to 'QA\_1.QA\_1\_INST'.

### RFID Library Code (Numeric)

For more information, see [Adding/Editing Institution Libraries](#).

---

## Configuring Location Codes for RFID

Since the RFID reader requires numeric content (that varies among RFID vendor implementations), the Alma location configuration (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Locations** when configuring a specific library) provides a parameter for specifying a numeric code value in addition to the alphanumeric code used within Alma. The **Numeric Location Code for RFID** parameter needs to be configured in order to write RFID content.

Add Location

Location Code \*

**Numeric Location Code for RFID**

Location Name \*

External Location Name

Location Type \*

Remote Storage

Fulfillment Unit

Call Number Type

Map

Close
Add
Add and Close

### RFID Location Code (Numeric)

For more information, see [Configuring Physical Locations](#).

## Transaction Log

The RFID Communication window that opens when you click the connection icon can be expanded to display a list of request and response RFID transaction activity. Use this log to help resolve any failed transaction with your RFID communication. Include a copy of this log with any RFID Salesforce issue that you may submit.

This window is needed for communication with the RFID reader.  
Please keep it open.

```

2016-2-29 17:14:0.738 INFO popup received request to call: ("url":"http://11-0161-8300.org.esilibrigroup.com:5000/TagService", "action": "GetDetectedItems", "system": "30000", "reader": null, "state": "PersistentSearch")

2016-2-29 17:14:0.740 INFO Sending to RFID server: <soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:tem="http://tempuri.org/"><soap:Header/><soap:Body><tem:GetItems/></soap:Body></soap:Envelope>

2016-2-29 17:14:0.984 INFO Output from RFID server: <?xml version="1.0" encoding="utf-8" standalone="no" ?><soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:tem="http://tempuri.org/"><soap:Header/><soap:Body><tem:GetItemsResponse xmlns="http://schemas.datacontract.org/2004/07/999.Arbitrar.ServiceModel" xmlns:is="http://www.xd.org/2001/XMLSchema-Instance"><is:Item><is:FirstSeen>2016-02-29T17:13:34.9748853+02:00</is:FirstSeen><is:Id>112233</is:Id><is:IsSecured>No</is:IsSecured><is:ItemId>true</is:ItemId><is:Tags><is:Tag><is:Field><is:Description l1="true"/><is:Name>GetNumber</is:Name><is:Type>UnsignedInteger32</is:Type><is:Value l1="true"/></is:TagField><is:TagField><is:Description l1="true"/><is:Name>GetSite</is:Name><is:Type>UnsignedInteger32</is:Type><is:Value l1="true"/></is:TagField><is:TagField><is:Description l1="true"/><is:Name>GetMedia</is:Name><is:Type>UnsignedInteger32</is:Type><is:Value l1="true"/></is:TagField><is:TagField><is:Description l1="true"/><is:Name>GetBranchId</is:Name><is:Type>UnsignedInteger32</is:Type><is:Value l1="true"/></is:TagField><is:TagField><is:Description l1="true"/><is:Name>CustomData</is:Name><is:Type>UnsignedInteger32</is:Type><is:Value l1="true"/></is:TagField></is:Tags></is:Item></is:ItemResults></tem:GetItemsResponse></soap:Body></soap:Envelope>

2016-2-29 17:14:0.986 INFO Output popup returns to Ajax: {"actualOutput":{"Items":[{"barcode": "112233", "tagId": {"id": "E90441001001454"}, "itemType": "0", "itemLocation": "1"}]}}
```

### RFID Communication Window Transaction Log

- On the library level (see [Adding/Editing IP Definitions for a Library](#))
  - On the campus level (see [Editing a Campus](#))
2. In the **Prefer remote storage** field, select **Yes** to assign priority to remote storage items when viewing results in the Get It tab, publishing to Primo, or the Primo RTA.
  3. Click **Save**.

---

## Configuring Other Settings

The following other settings are available:

- **Enable Display of License Information** - Select to enable the display of an online resource's license information in the View It tab. For more information, see [Displaying License Information in the View It Tab](#).
- **Max. Number of Representations in View It** - the maximum number of digital representations that are displayed in the **View It** tab. If there are more representations to display than the maximum number configured, a **More...** link appears. Click **More...** to display the full list of representations available in a new browser tab. (The default value is set with the `viewit_max_representations_displayed` parameter. For more information, see [Configuring Other Settings](#).)

---

## New for April! Mapping Primo Views to Libraries

**PERMISSIONS:** To map Primo view to libraries, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

---

**To map Primo views to libraries:**

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Primo View to Libraries**.

**Mapping Table** [Cancel](#) [Customize](#)

You are configuring: QA - Provisioning [Organization Unit List](#)

**Table Information**

Sub System	FULFILLMENT	Table Name	Primo view mapped into Alma libraries
Updated By	-	Last Updated	-
Table Description	<input type="text" value="Primo view mapped into Alma libraries for uresolver getit filtering"/>		

**Mapping Table Rows**

No records were found.

**Create a New Mapping Row**

**Quick Add**

View	Library Code
<input type="text"/>	<input type="text"/>
<a href="#">Add Row</a>	

[Cancel](#) [Customize](#)

**Mapping a Primo View to Libraries**

2. Enter the Primo view name and the Alma library code which will appear in the filtered view. A new row may be added for each library that will appear in a Primo view.
3. Click **Customize**.

## Integration of the Aleph Central Catalog

### New for April!

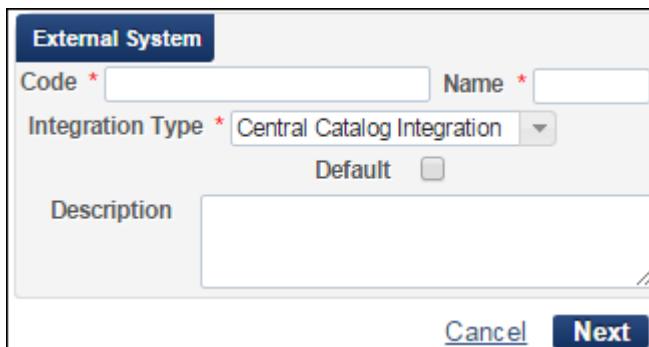
Alma supports the use of the Aleph Central Catalog to allow Alma institutions to perform the following functions:

- Copy cataloging from the central catalog to Alma
- Contribute changes to the central catalog from Alma
- Publish inventory to the central catalog from Alma
- Import changes from the central catalog to Alma

In order to use the Aleph Central Catalog, you must configure a central catalog integration profile.

**To configure a central catalog integration profile:**

1. From the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), click Add Integration Profile. The following appears:



The screenshot shows a web form titled "External System" with the following fields and controls:

- Code \***: A text input field.
- Name \***: A text input field.
- Integration Type \***: A dropdown menu with "Central Catalog Integration" selected.
- Default**: A checkbox, currently unchecked.
- Description**: A large text area for entering details.
- Buttons**: "Cancel" and "Next" buttons at the bottom right.

**Add integration Profile**

2. Enter a **Code** and **Name** for the integration profile.
3. Select **Central Catalog Integration** from the **Integration Type** drop-down list.
4. Click **Next**. The following appears:

External System 1-2 Back Cancel Save

---

**External System**

Code Aleph Integration    Name Aleph Inegration    Integration Type Central Catalog Integration

**Actions**

Central Catalog System

System \* Aleph

---

Contribution Configuration

Host \*

Port \*

Library \*

System Number Prefix \*

Username

Password

Allow Delete

---

Central Catalog Record Changes Configuration

Host \*

Port \*

Local Catalog ID \*

Username \*

Password \*

---

Data Retrieval Configuration (Z39.50)

Host \*

Port \*

Base \*

Search Attribute \*

Username

Password

---

Import

Active \*  Active  Non Active

Schedule

Repository Import Profile \*

Bibliographic Library Codes (Comma Separated)

Last Harvest ID

Back Cancel Save

## Central Cataloging Integration

5. Fill in the fields according to the following table:

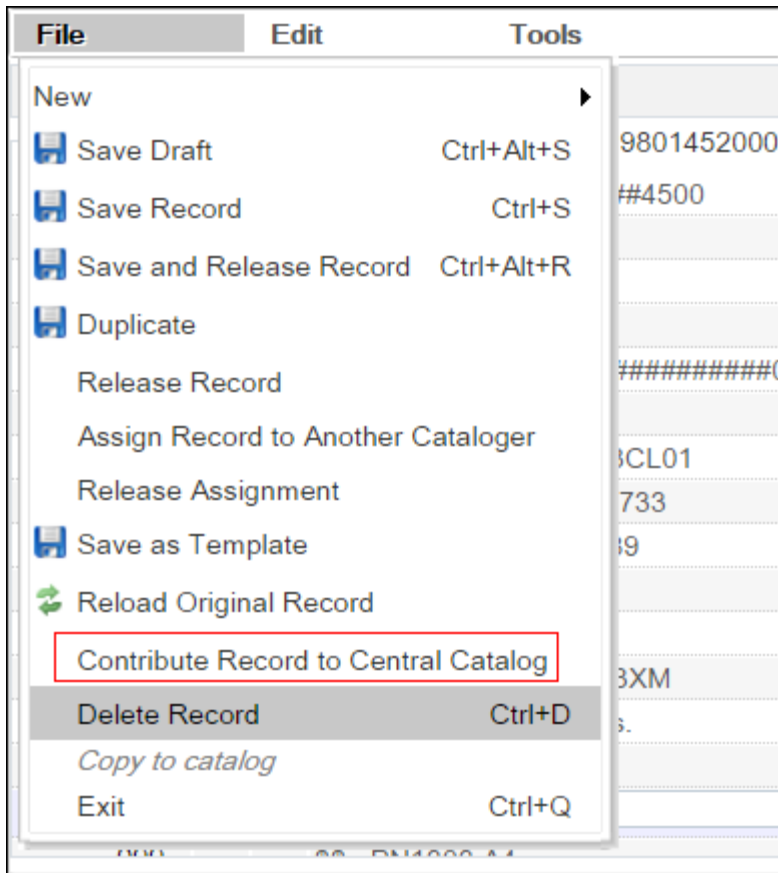
Central Catalog Integration

Field	Description
<b>Central Catalog System</b>	
System	Aleph is currently the only available option.
<b>Contribution Configuration</b>	
Host	The IP address of the Aleph Central Catalog
Port	The port of the Aleph Central Catalog
Library	The Aleph library in which the document is updated
System Number Prefix	The library unique system number prefix (for example, BVB0001)
User name	The user name in Aleph
Password	The password in Aleph
Allow Delete	Select to enable the deletion of records in the central catalog
<b>Central Catalog Record Changes Configuration</b>	
Host	The IP address for the VST server in the Aleph Central Catalog
Port	The Aleph Central Catalog port to send the TCP/IP call
Local catalog ID	Used to identify the library in Aleph
Username	The user name to send to the Aleph Central Catalog
Password	The password to send to the Aleph Central Catalog
<b>Data Retrieval Configuration (Z39.50)</b>	
Host	The IP address of the Aleph Central Catalog

Field	Description
Port	The Aleph Central Catalog port to send the Z39.50 calls
Base	The database in Aleph to send the Z39.50 query
Search Attribute	The unique identifier of the location of the system number in the central catalog (equivalent to the Marc 001 field)
Username	The user name to send to the Aleph Central Catalog for z39.50
Password	The password to send to the Aleph Central Catalog for z39.50
<b>Import</b>	
Active	Select <b>Active</b> for the import profile to be active or <b>Non-active</b> for the profile to be non-active
Schedule	To schedule the import process, select a schedule from the drop-down list.
Repository Import Profile	Select a repository MD import profile on which the bibliographic import is based
Bibliographic Library Codes (Comma Separated)	Enter the Aleph library codes that hold the bibliographic records (coma separated)
Last Harvest ID	This field is populated after the first successful run of the process, indicating that start point of the next run. You can edit this value if you want to retrieve data from a specific record ID.

6. Click **Run** if you want to run the integration profile process manually.
7. Click **Save**.

The central catalog integration profile is configured. You now see the Contribute Record to Central Catalog option in the MD editor:



**Contribute Record to Central Catalog**