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Table of Contents

Alma February 2016 Release Highlights

Resource Management

- **Efficient Creation of Multiple Portfolios for a Bibliographic Record** – To ensure more efficient inventory creation, time-saving features have been incorporated into Alma for adding multiple portfolios. For example: efficient creation of multivolume e-books (with different portfolios for the same bibliographic record).
- **Community Zone Electronic Collections Enhanced with Collection Level Bibliographic Record Content** – All the electronic collections in the Alma Community Zone are being updated with electronic collection-level bibliographic records. After an electronic collection has been activated, you can use the **All titles** search to retrieve electronic collection bibliographic record results. The collection level bibliographic record can also be exposed in the discovery system. Note that this enhancement is being implemented in phases starting with the February 2016 release of Alma.
- **Derive an Authority Record from a Headings in the Bibliographic Record** – Additional productivity enhancements are being provided in the MD Editor related to creating local authority records when there is no headings match. There are cases in which a cataloger catalogs a bibliographic record with a headings field that cannot be linked to an existing authority record. For these cases, Alma now provides a quick creation option for creating a local authority record with the relevant content. This capability is provided for institutions that have the appropriate parameters set for managing local authority records.
- **MD Editor Usability Enhancements** – In a continuing effort to provide productivity improvements in Alma, the February release incorporates several enhancements to the MD Editor that include input from the Idea Exchange related to viewing inventory.
- **Sharing Import Profiles Between Institutions** – Institutions spend a great deal of time creating import profiles to import records from external systems. Many institutions integrate with the same external systems. In order for these institutions to save time and effort, librarians can now use the import profiles that other institutions contribute to the Community Zone.

Fulfillment

- **Aggregate Lost/Overdue Notifications (a NERS enhancement)** – Alma can now be configured to send a single overdue or lost item notification to the patron listing all of the patron's overdue or lost loans. This can be used to replace the previous option where a notice was sent for each overdue or lost loan.
- **User Anonymization for Fines/Fees** – A configuration parameter can be used to activate fines/fees anonymization. Anonymizing fines/fees will detach any closed (that is, fully paid or waived) fine/fee from the user record of the patron who owed it. Statistical patron information, such as User Group and User Statistics, will remain on the fine/fee record and be fully reportable in Analytics.
- **Enhanced Digitization Workflow** – The staff workflow for processing digitization requests has been enhanced so that digitized files may be added to titles with the Alma **Add Representation** functionality, simplifying the digitization process. This development replaces the deposit workflow currently in use.

Collaborative Networks

- **Local Authority Enhancements in the Network Zone** – Collaborative network members can now share cataloging activity in relation to authority records that are managed centrally in the Network Zone by creating and editing authority records that are managed centrally in the Network Zone.

Analytics

- **Permanent Call Number and Fulfillment Note Fields Added to Physical Items Details Dimension** – The Permanent Call Number and Fulfillment Note fields have been added to the shared Physical Item Details dimension of the Fulfillment subject area. The Fulfillment Note field has also been added to the Physical Item Details dimension of the Requests subject area. In addition, the Physical Item Details dimension has been added to the Lending Requests subject area.

- **Lifecycle Field Added to Portfolio Dimension** – The **Lifecycle** field has been added to the Portfolio dimension of the E-Inventory subject area. This allows you to filter reports by Active/Deleted items.

Alma Usability

- **New Option to Export All Fields of a Modified Table to Excel** – When exporting a table with hidden columns to Excel, you can now choose to export only the visible columns or all of the columns, including the hidden ones.
- **Inventory Number and Inventory Price Columns Available for List of Items** – The **Inventory Number** and **Inventory Price** fields can now be displayed on the List of Items page.
- **Keyboard Shortcuts Added to Alma UI** – A number of keyboard shortcuts have been added to the Alma UI. A tooltip with the shortcut appears when hovering over the button.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for this release of Alma.

Alma Show Me How

Description

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

Step-by-Step Instructions

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

To access Show Me How:

1. From the Alma home page, click **Show Me How**.

   The How Can We Assist You? pop-up window displays.
2. Select one of the processes in order to start the prompted step-by-step instructions.

Alma Videos

The following new videos are available from the Show Me How menu, and when you select **Help > What's New Videos** in Alma:

- Efficient Creation of Multiple Portfolios for a Bibliographic Record
- Derive an Authority Record from a Headings in the Bibliographic Record
- Sharing Import Profiles Between Institutions
- Local Authority Enhancements in the Network Zone

Making the Most of This Release

The following release note features require actions or decisions on the part of your institution in order to implement:

Action Items
☐ Sharing Import Profiles Between Institutions – Looking to import records from an external provider? Check the Community Zone to see whether it includes a specification of the import profile for your use. Do you have an import profile that you would like to share with the community? You can now upload it to the Community Zone for others to use.
☐ Aggregate Lost/Overdue Notifications_Sharing_Import_Profiles - As most libraries do, your library probably sends out patron notices for long overdue items. With this release, you can upgrade your patrons' experience to receive a single notice for multiple overdue loans instead of multiple notices (the only option until now). Activating this option is just a simple flag configuration away from you now!
☐ Enhanced Digitization Workflow_Sharing_Import_Profiles - Do you digitize physical library material? Would you like to store the digitized content as part of your temporary or permanent digital inventory? The wizard for doing this is so much simpler now. With minimal clicks and using an intuitive interface, you can add the new digital representation and files into Alma's digital inventory as part of your digitization workflow.

Acquisitions

The following enhancements were made in the Acquisitions functional area for this release of Alma:

- When creating an invoice, the **Vendor** and **Vendor Account** fields now appear above the **Total amount** and **Total invoice lines amount** fields. After selecting a vendor, the currency unit defaults to one associated with the vendor.

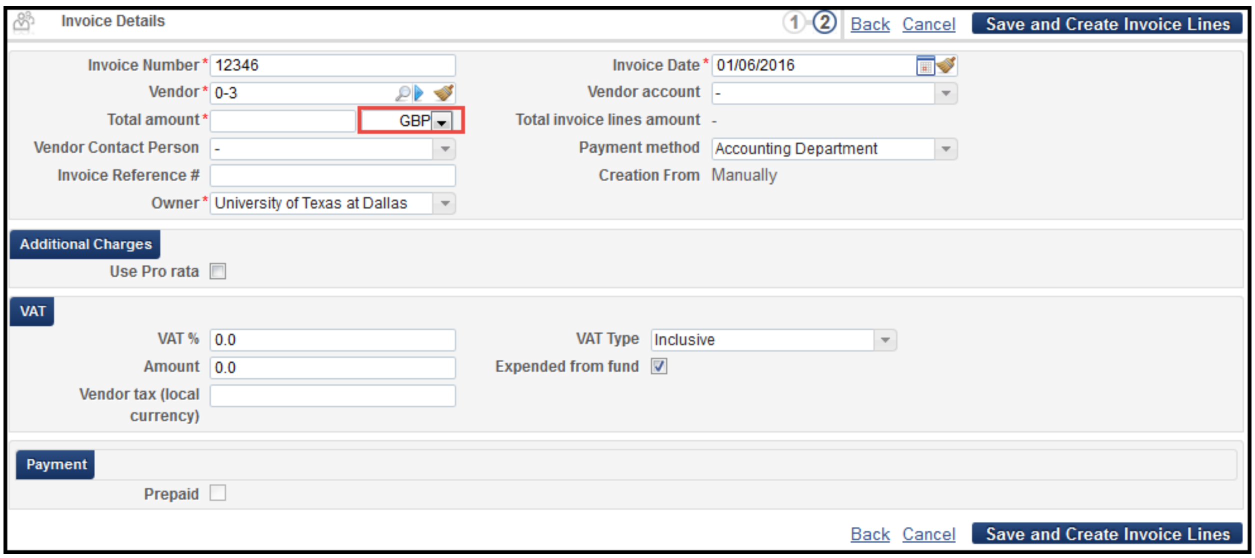


Figure 1 - Create Invoice Page 2

- User information icons were added to the **Participants** tab of the Trial Details page.

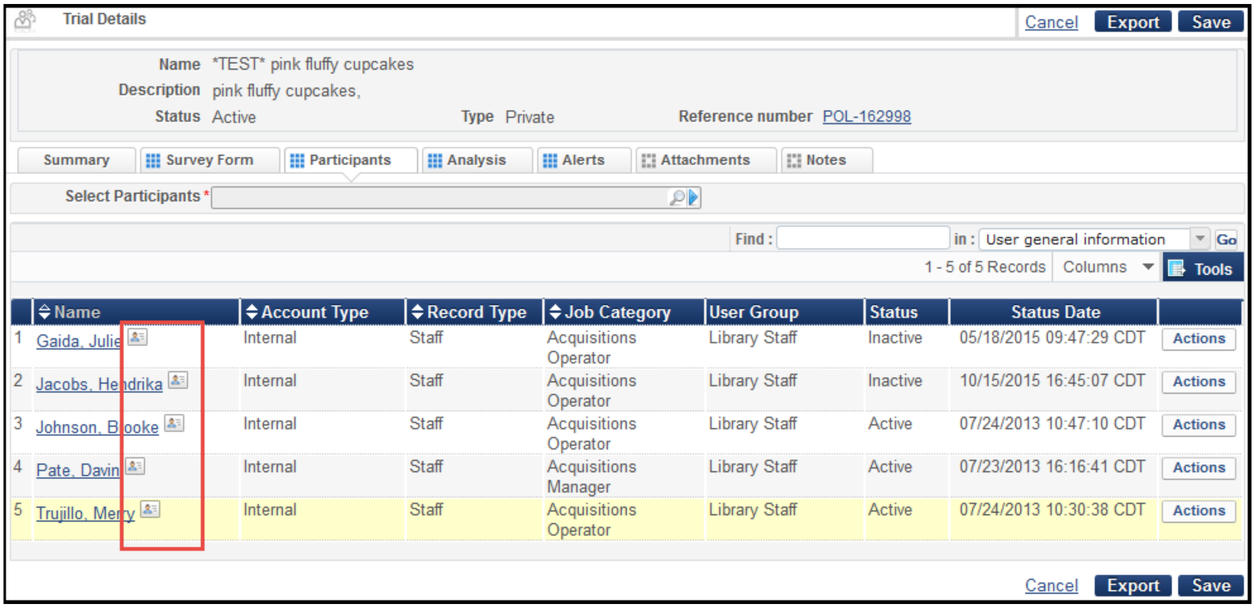


Figure 2 - Trial Details Page, Participants Tab

- **Idea Exchange feature – **Allocated Balance** was added to the Funds and Ledgers. This is the sum of all allocated transactions of the fund/ledger. This field also appears in Excel file when the page is exported.

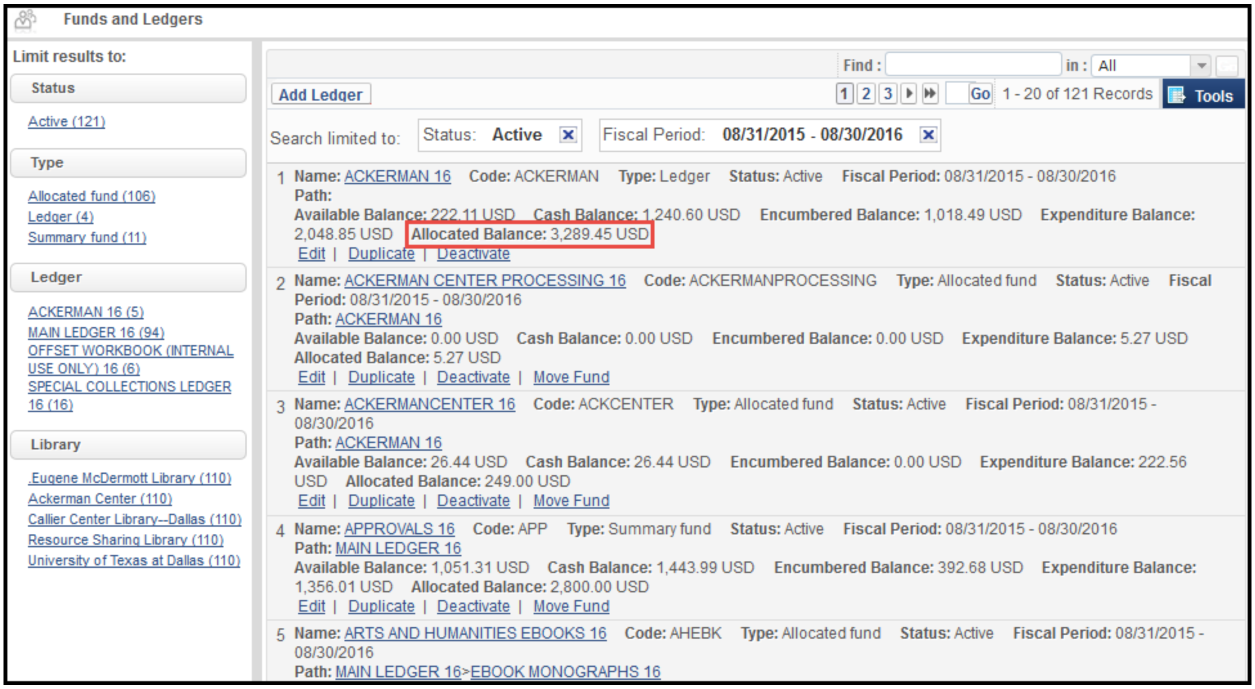


Figure 3 - Funds and Ledgers Page

- When the new Acquisition configuration parameter **no_e-task_on_close_po_line** is set to **true**, a task is not created when an electronic PO line is closed (the task reminded the user to deactivate the resource). Typically this is relevant for a continuous order. The default for this parameter is **false**, which corresponds to the existing functionality.

Resource Management

The following sections describe new or changed Resource Management features in this release of Alma.

Efficient Creation of Multiple Portfolios for the Same Bibliographic Record

Description

To ensure more efficient inventory creation, time-saving features have been incorporated into Alma for adding multiple portfolios such as the creation of multivolume e-books that have different portfolios for the same bibliographic record. These enhancements are available in the following functional areas:

- Adding new local portfolios with **Resource Management > Create Inventory > Add Local Portfolio**
- Adding new local portfolios for a bibliographic record in the MD Editor
- Adding new local portfolios through the Electronic Service Editor

Step-by-Step Instructions

The following role can add multiple local portfolios using the new time-saving features:

- Electronic Inventory Operator

To access the new time-saving options when using Add Local Portfolio and adding multiple portfolios:

1. Open the New Portfolio page (**Resource Management > Create Inventory > Add Local Portfolio**) and enter the portfolio information as you normally do.
2. Open the list of **Save** options.

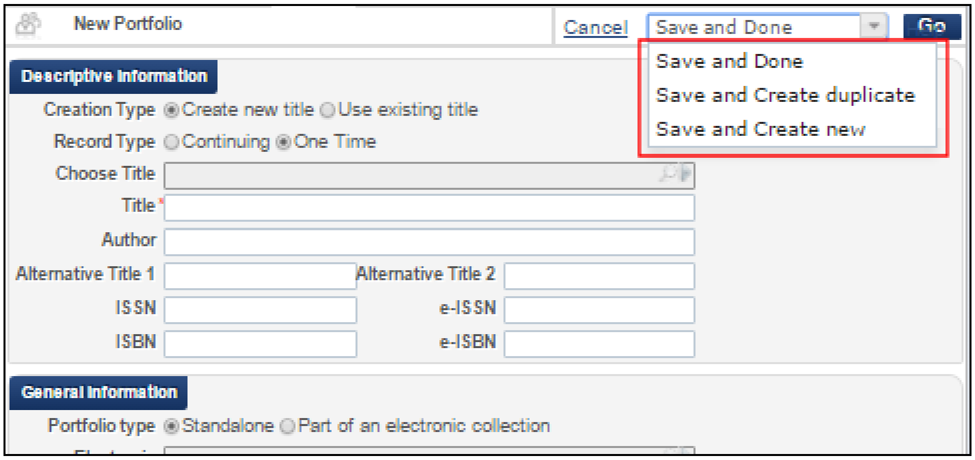


Figure 4 - New Save Options on the New Portfolio Page

The new **Save** options include the following selections:

- **Save and Done** – This option provides the same functionality previously known as **Save**. It saves the portfolio information that you entered and closes the New Portfolio page.
- **Save and Create Duplicate** – This option saves the portfolio information that you entered and automatically repopulates the New Portfolio page with the same information for you to edit for the next portfolio to be created.
- **Save and Create New** – This option saves the portfolio information that you entered and reopens the New Portfolio page for you to enter the next new local portfolio to be created, thereby saving the steps of opening the New Portfolio page again manually.

3 After selecting one of the **Save** options, click **Go**, and continue entering additional portfolios.

To access the new time-saving options when using the MD Editor and adding multiple portfolios:

1 Complete a Repository Search for a bibliographic record to which you want to add portfolios.

2 From the Repository Search results page, click **Edit** for a bibliographic record to which you want to add portfolios. The MD Editor page opens with the details of the bibliographic record.

3 Click the **Add Local Portfolio (Alt+O)** icon or select **Tools > MARC Bibliographic > Add Local Portfolio**. As previously implemented, the New Portfolio page appears with the **Use existing title** radio button selected and the **Choose title** field filled in and identified as a required field with a red asterisk. The new **Save** options are also available from this page.

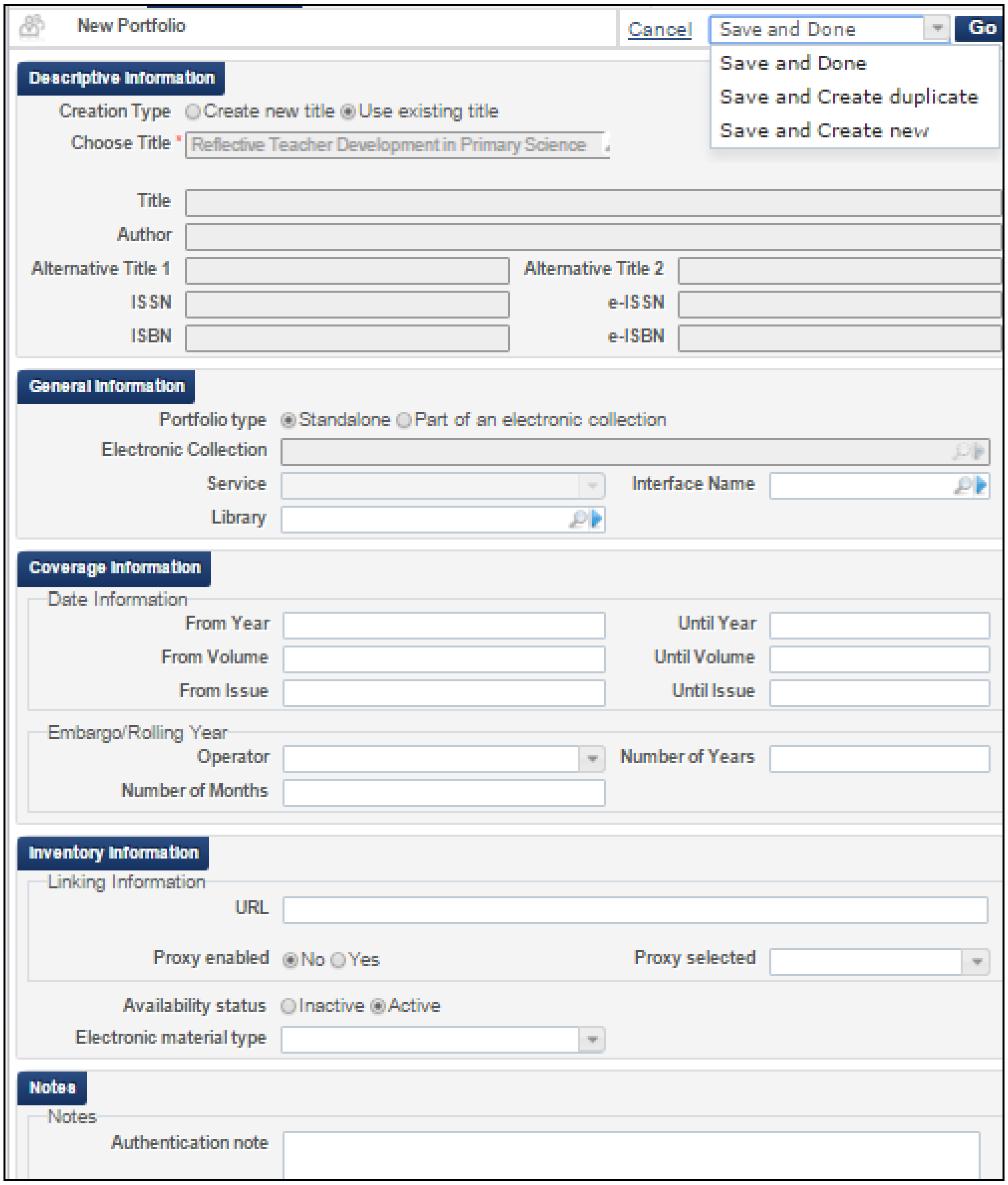


Figure 5 - Adding a New Portfolio to a Bibliographic Record from the MD Editor

4 Enter the information for the first portfolio and select one of the **Save** options (as described above) and click **Go**.

   When you select **Save and Create Duplicate** to add multiple portfolios, the New Portfolio page appears automatically. The **Choose title** field continues to be filled in with the title information from the bibliographic record plus the other information that you entered/saved repopulates the New Portfolio page.

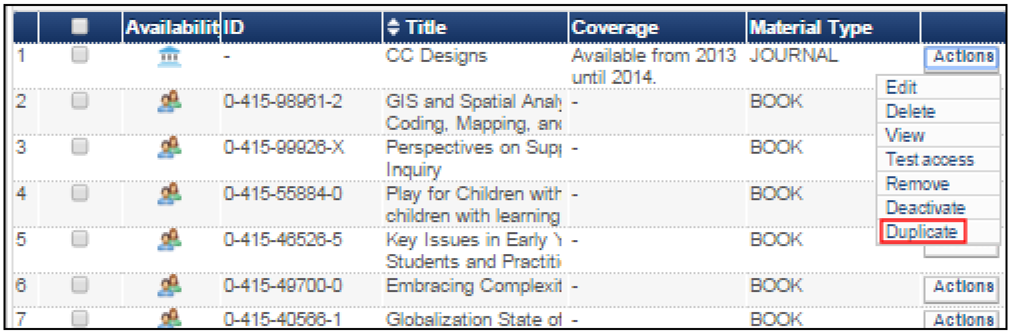
   When you select **Save and Create New** to add multiple portfolios, the New Portfolio page appears automatically. The **Choose title** field continues to be filled in with the title information from the bibliographic record, and the manually entered information is cleared to allow new portfolio creation.

To access the new time-saving options when using the Electronic Service Editor and adding multiple portfolios:

1. Complete a Repository Search for an electronic collection to which you want to add portfolios.
2. From the Repository Search results page, click **Edit Service** for electronic collection to which you want to add portfolios. The Electronic Service Editor page opens with the details of the service information for the electronic collection.
3. Select the **Portfolios** tab.
4. Choose one of the following options:

   a. **Actions > Duplicate**.

      For a local portfolio, select **Actions > Duplicate**. This is a new **Actions** option that duplicates the local portfolio information (internal description, PO line, override information such as coverage, authentication note, and public note) from the local portfolio from which you selected this action and opens the Electronic Portfolio Editor page with the duplicated information for you to edit.



		Availabilit	ID	Title	Coverage	Material Type	
1			-	CC Designs	Available from 2013 until 2014.	JOURNAL	Actions
2			0-415-98961-2	GIS and Spatial Analy Coding, Mapping, anı	-	BOOK	
3			0-415-99926-X	Perspectives on Supı Inquiry	-	BOOK	
4			0-415-55884-0	Play for Children with children with learning	-	BOOK	
5			0-415-46526-5	Key Issues in Early Y Students and Practiti	-	BOOK	
6			0-415-49700-0	Embracing Complexit	-	BOOK	Actions
7			0-415-40566-1	Globalization State of	-	BOOK	Actions

Figure 6 - Duplicating a Local Portfolio from the Service Editor

b **Add Local Portfolio**.

Click **Add Local Portfolio**. As previously implemented, the New Portfolio page appears with the **Use existing title** radio button selected and the **Electronic Collection** field and the **Service** field filled in and identified as required fields with a red asterisk. The new **Save** options are also available from this page.

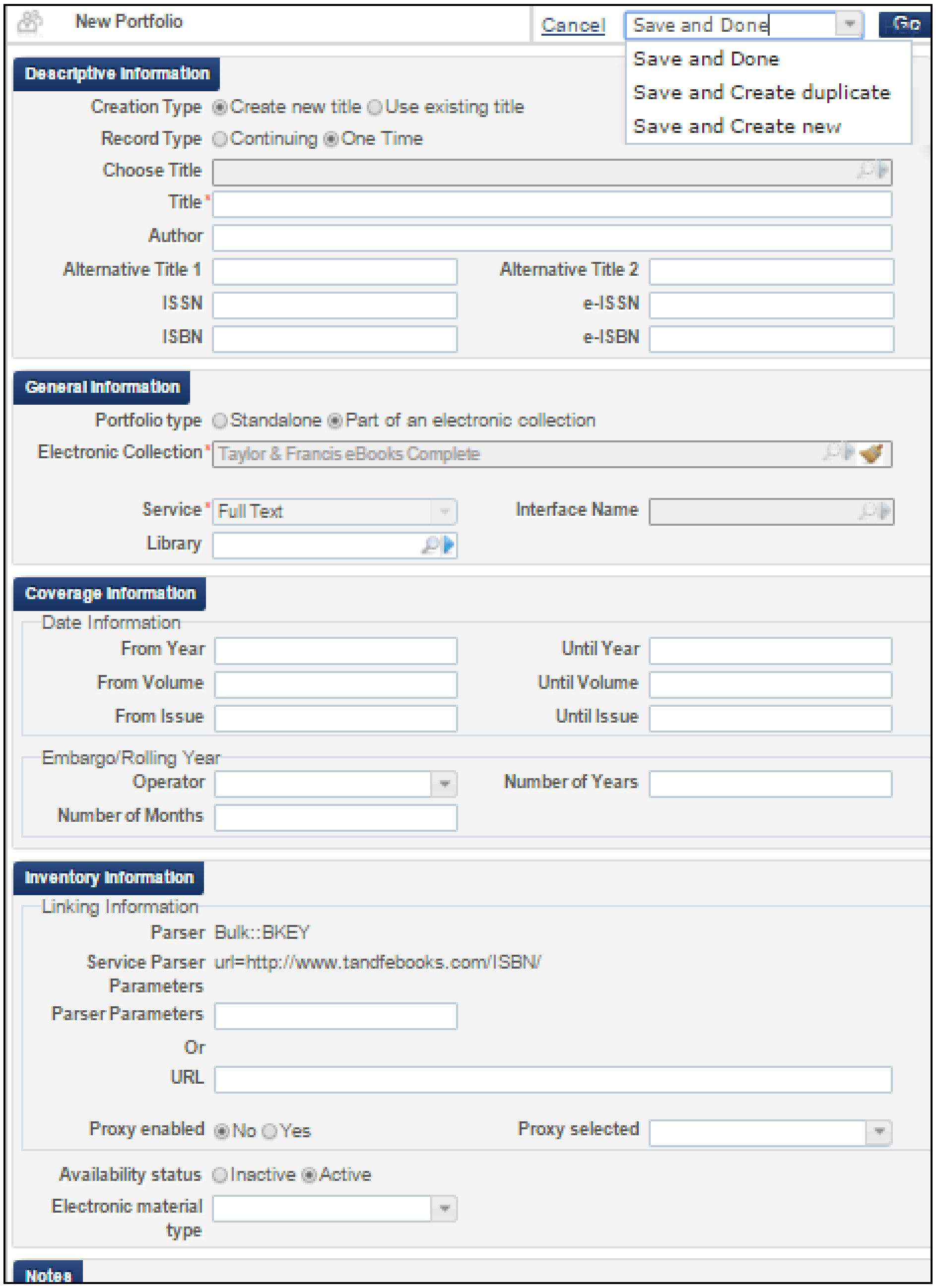


Figure 7 - Adding a Local Portfolio from the Service Editor

Enter the information for the first portfolio and select one of the **Save** options (as described above) and click **Go**.

When you select **Save and Create Duplicate** to add multiple portfolios, the New Portfolio page appears automatically. The **Electronic collection** field and the **Service** field continue to be populated with the electronic collection and service information from the Electronic Service Editor plus the other information that you entered/saved repopulates the New Portfolio page.

When you select **Save and Create New** to add multiple portfolios, the New Portfolio page appears automatically. The **Electronic collection** field and the **Service** field continue to be populated with the electronic collection and service information from the Electronic Service Editor, and the manually entered information is cleared to allow new portfolio creation.

Community Zone Electronic Collections Enhanced with Collection-Level Bibliographic Record Content

Description

All the electronic collections in the Alma Community Zone are being updated to have electronic collection-level bibliographic records. Based on the data available for each electronic collection in the Central KnowledgeBase, valid MARC records are being created. After an electronic collection has been activated, you can use the **All titles** search to retrieve electronic collection bibliographic record results. Having collection-level bibliographic records enables the exposure of the collection-level information in your discovery system if you want it.

For consortia working with a Network Zone, the Alma bibliographic synchronization process that activates bibliographic records in the Network Zone also updates the Network Zone with bibliographic records for activated electronic collections. As a result, when searching for these bibliographic records in the Network tab, the **Held by** function displays information about members that hold the associated electronic collections.

Note: This enhancement is being implemented in phases starting with the February 2016 release of Alma. Initially, electronic collections that are added to the Central KnowledgeBase in February will have bibliographic records. Once these electronic collections are activated, you will be able to complete an **All titles** search for these bibliographic records. During the March 2016 release, a bibliographic record will be created for every electronic collection in the Community Zone. These bibliographic records will be harvested automatically and will be associated with the electronic collections activated from the Community Zone unless you have attached the electronic collections to other bibliographic records. The harvested bibliographic records will be suppressed and will not be published unless you un-suppress them and the electronic collection has a URL.

Step-by-Step Instructions

The following role can work with electronic collection bibliographic records:

- Electronic Inventory Operator

To view electronic collection activation changes with the addition of bibliographic records:

1 Complete an Electronic Collection repository search (from the Community tab) to locate an electronic collection that you want to activate.

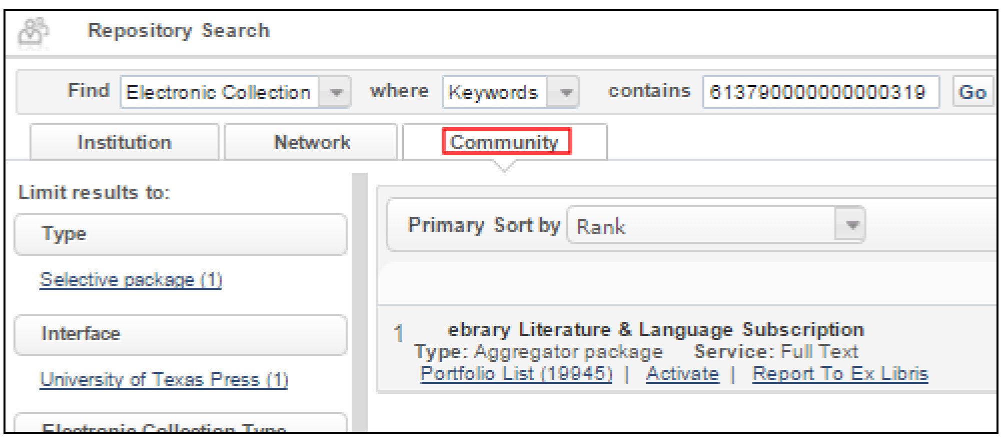


Figure 8 - Search for Electronic Collection to Activate

2 Click **Activate**. The Activation Wizard page appears.

The **Additional descriptive information** field displays content indicating that a bibliographic record is available for the electronic collection that you are activating.

A new **Mark bib as suppressed** check box is provided. Use this check box to indicate if you want the bibliographic record to be suppressed. The default for this option is to suppress the bibliographic record. Remove this check box selection if you want the bibliographic record to be viewable/published to the discovery system. Unsuppressed bibliographic records are published to the discovery system if there is available URL information, and any available URL information for the electronic collection will be discoverable. If there is no URL, the bibliographic record will not be published.

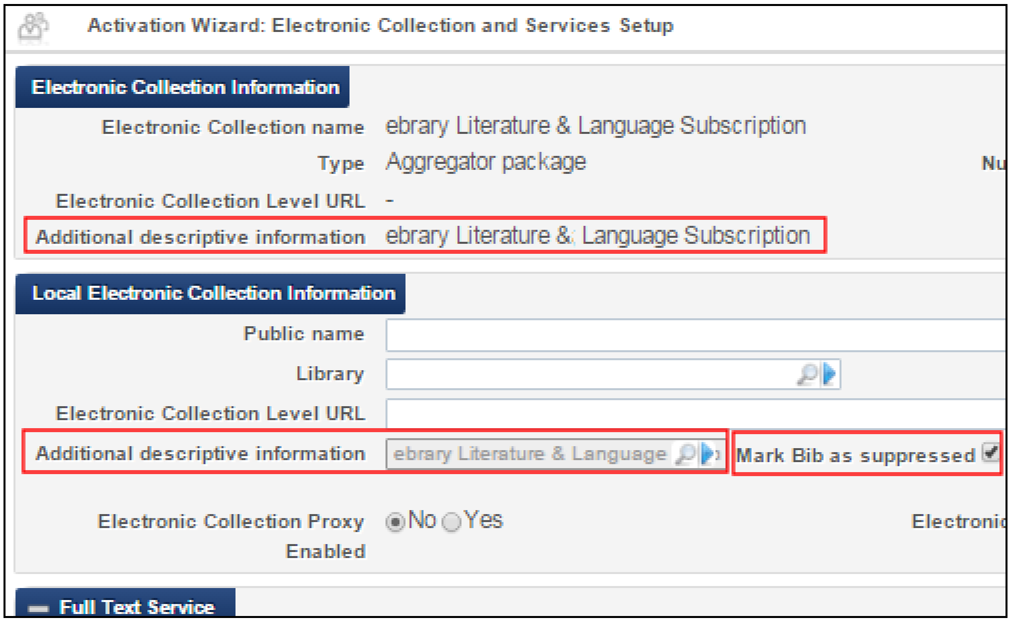


Figure 9 - New Activation Options for Electronic Collections

Note: Any relevant changes to the electronic collection in the Community Zone will be reflected in the bibliographic record and harvested/distributed.

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3 Complete the activation process as you normally would.

To view a MARC record provided with an electronic collection:

1 Complete an **All titles** search for an electronic collection from the Institution tab.

2 From the search results, click the electronic collection title link to display the MARC Record Simple View page.

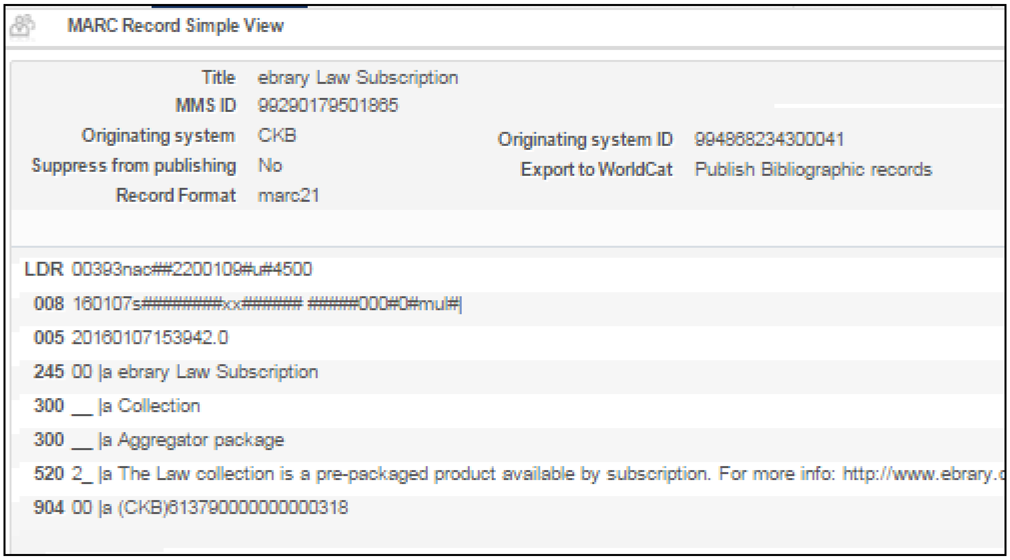


Figure 10 - Electronic Collection Bibliographic Record

To view Network tab changes with the addition of bibliographic records in the Network Zone:

1. Complete an **All titles** search for an electronic collection from the Network tab.
2. Click a **Held by** link for the electronic collection.

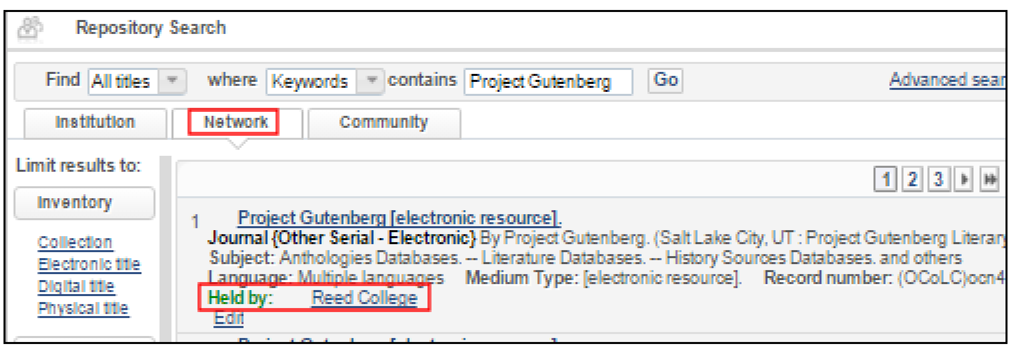


Figure 11 - Collection-Level Bibliographic Record Content Held By in the Network Zone

3 Select the **Electronic Collections** tab to view information provided by the bibliographic record associated with the electronic collection.

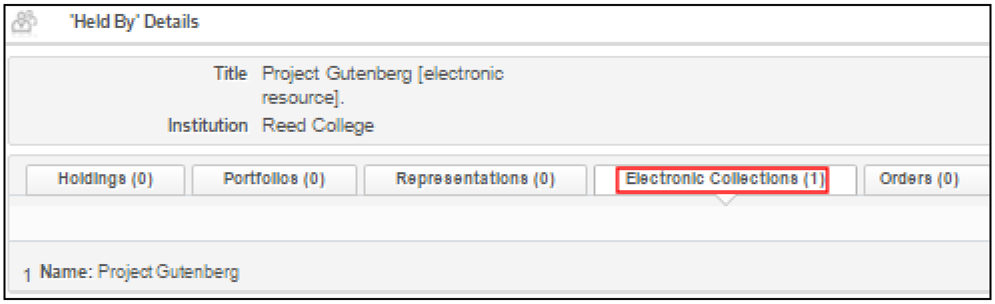


Figure 12 – Collection-Level Bibliographic Record Content in the Network Zone Electronic Collections Tab

To view the Electronic Collection Bibliographic Record Update filter provided in the Community Zone Updates Task List for electronic collection bibliographic records:

1 Open the Community Zone Updates Task List (**Resource Management > Manage Inventory > Community Zone Updates Task List**).

2 Open the **Action** drop-down list.

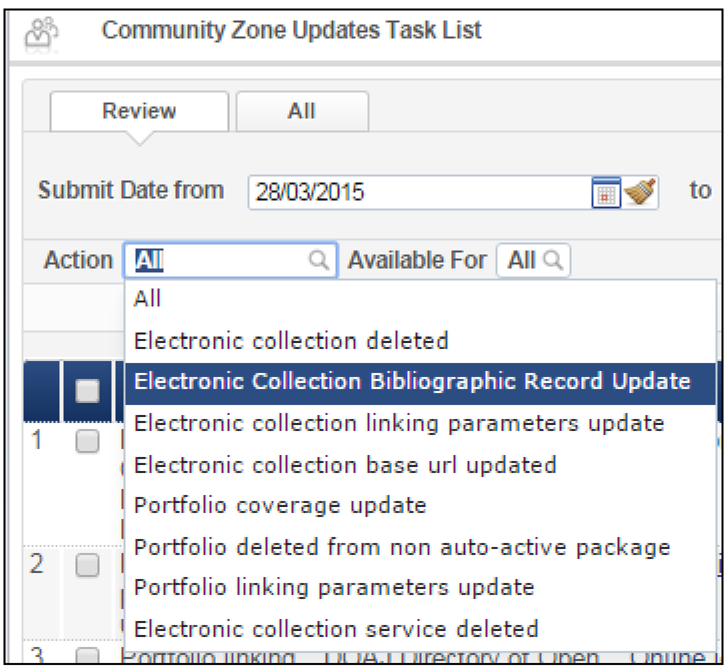


Figure 13 - Action Drop-Down List in the Community Zone Updates Task List

3 Select **Electronic Collection Bibliographic Record Update**. The filtered list appears.

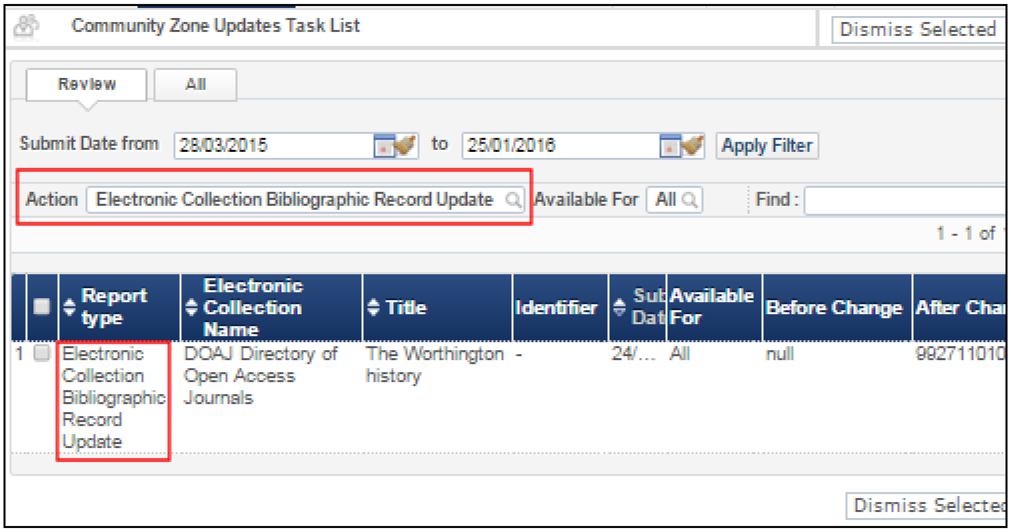


Figure 14 - Electronic Collection Bibliographic Record Update Filter

Derive an Authority Record from a Headings in the Bibliographic Record

Description

Additional productivity enhancements are being provided in the MD Editor related to creating local authority records when there is no headings match. There are cases in which a cataloger catalogs a bibliographic record with a headings field that cannot be linked to an existing authority record. For these cases, Alma now provides a quick creation option for creating a local authority record with the relevant content. This capability is provided for institutions that have the appropriate parameters set for managing local authority records.

Step-by-Step Instructions

The following roles can access the new MD Editor option for quickly adding authority records for headings with no match:

- Cataloger
- Catalog Manager
- Catalog Administrator

To use the new option to add authority records for headings with no match:

1. Open the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).
2. Create a new bibliographic record (**File > New > MARC21 Bibliographic**).
3. Enter headings information in an appropriate field that you know does not exist in an authority record and press **F3**. The field appears in the normal manner with the addition of the new **Create Authority Record** button.

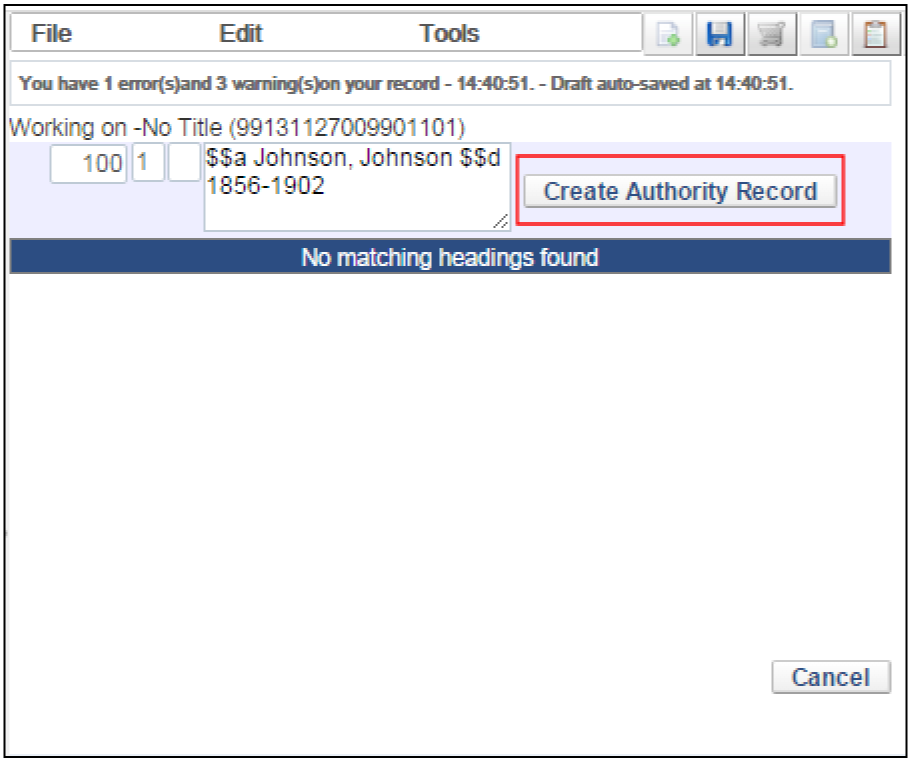


Figure 15 - Create Authority Record Button

4 Click **Create Authority Record**. The new authority record is created and displays in the MD Editor in the side-by-side, split screen format.

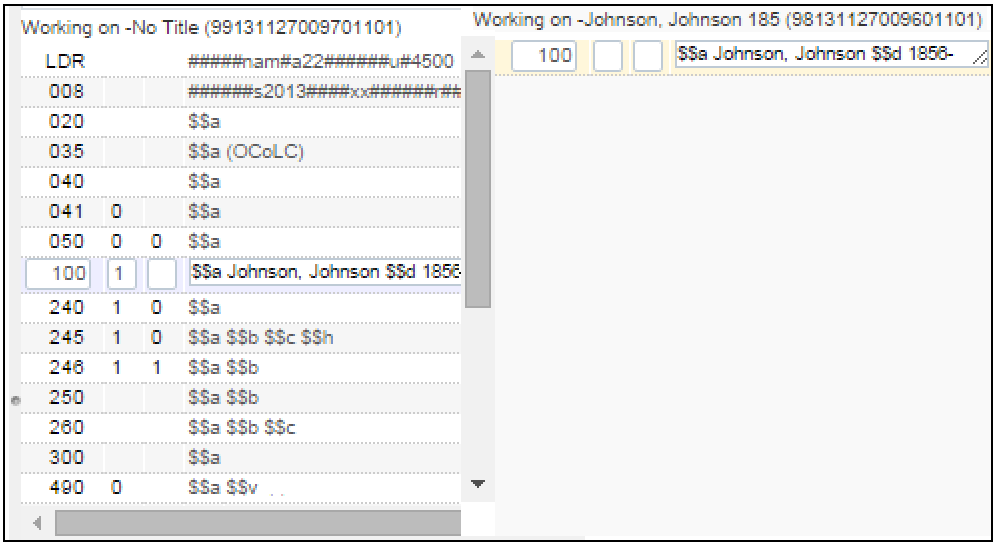


Figure 16 - Quick Authority Record Created

The list of authority records also shows the new authority record that you created.

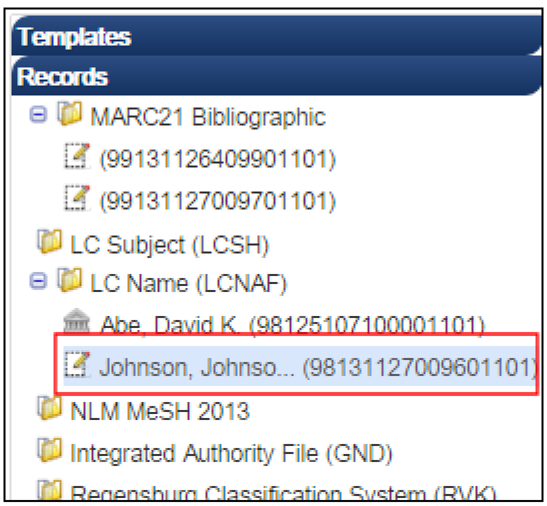


Figure 17 - List of Authority Records in the MD Editor

Note: When you create authority records using **Create Authority Record** and the focus field when you press F3 is a non-preferred field such as the 600 field, the content is placed in the preferred field 100 in the new authority record that is created.

5 Complete processing the bibliographic record as you normally would.

MD Editor Usability Enhancements

Description

In a continuing effort to provide productivity improvements in Alma, the February release incorporates several enhancements to the MD Editor that include input from the Idea Exchange related to viewing inventory. Refer to the table below for the usability improvements made to the MD Editor.

Previous Implementation	Improvement
When editing an existing indicator and using backspace or delete (to clear the value), the cursor jumps to the end of the last subfield value.	The cursor now remains in the indicator position when you edit that component.
When the text is long for a particular field, the MARC tag and indicators are located in the middle vertically.	The preferred location of having the MARC tag and indicators located vertically at the top and aligned horizontally with the first line of the field has been implemented.
When the cursor is located in a control field (001-008) and a new data field is added, the new data field is placed at the end of all the data fields.	When the cursor is located in a control field (001-008) and a new data field is added, the new data field is placed after the 008 control field. When the record is saved, the data field is placed in the proper sequential position.
When navigating through fields by tabbing from the first indicator to the second indicator, and then to the subfields, the curser jumps to the end of the field, that is, after the last subfield.	The cursor now moves from the second indicator to the first subfield and then to each following subfield and, subsequently, to the field number in the next row when using the tab key. The shift+tab key can be used to go in reverse order from subfield to subfield and so forth.
Tooltips are provided for all components of a field, the tag, indicators, and subfields. When the subfield text is lengthy, the tooltip content that displays hides other fields/values.	When pointing the mouse at field content, tooltips are provided for only tags and each indicator position, not the subfields.

Previous Implementation	Improvement
When a bibliographic record is opened, inventory viewed, clicking **Edit** (holdings) displays the holdings record on the full screen. The left side of the screen (tree view) under the **Records** tab is not updated. Nothing is seen under holdings (MARC21 Holdings folder). Only after saving the holdings record, you can see it.	The holdings record information is now updated in the MARC21 Holdings folder (under the **Records** tab at the left) when **Edit** is clicked.
When a bibliographic record is opened, and inventory viewed, clicking **Edit** (holdings) displays the holdings on the full screen instead of retaining the split screen.	The split screen is now maintained when editing holdings.
For control vocabulary, closed list, one can key in only one letter. When there are many values, one can scroll down only one by one. When one keys in a second letter, the list jumps to that (first) letter in the list.	The capability to use **Page Up** and **Page Down** was added in order to scroll through the list of options as provided with 245 $h. (There is a known issue with this implementation in the Chrome browser.)
When clicking **F3** (authority lookup), the **Cancel** button is hidden by the cataloger level.	The **Cancel** button was moved so that it is visible when the cataloger level is displayed.
Under the Template tab in the MD Editor, when you choose **New** from the drop-down list for a specific template, the record opens on the main screen, but on the left, you are still in the template list.	When a new record is opened using the **New** option under the Template tab, the Records tab becomes the open and active tab with the new record displayed there.
** IDEA EXCHANGE ** From the MD Editor holdings record, one is unable to view inventory.	When working with a holdings record, the **View Inventory** option was added to the **Tools > MARC21 Holdings** list of options, and the **View Inventory** icon is an active option.

Previous Implementation	Improvement
In the MD Editor, when working with a holdings record and choosing to add an item, after saving the item, you are taken back to the holdings record. There is no view of the item that was added. In order to access the item that was added, you need to go back to the holdings record in the MD Editor and view the inventory on the right-hand side.	After adding and saving an item for a holdings record, the holdings and inventory/item information displays side-by-side, in split-screen mode.

Sharing Import Profiles Between Institutions

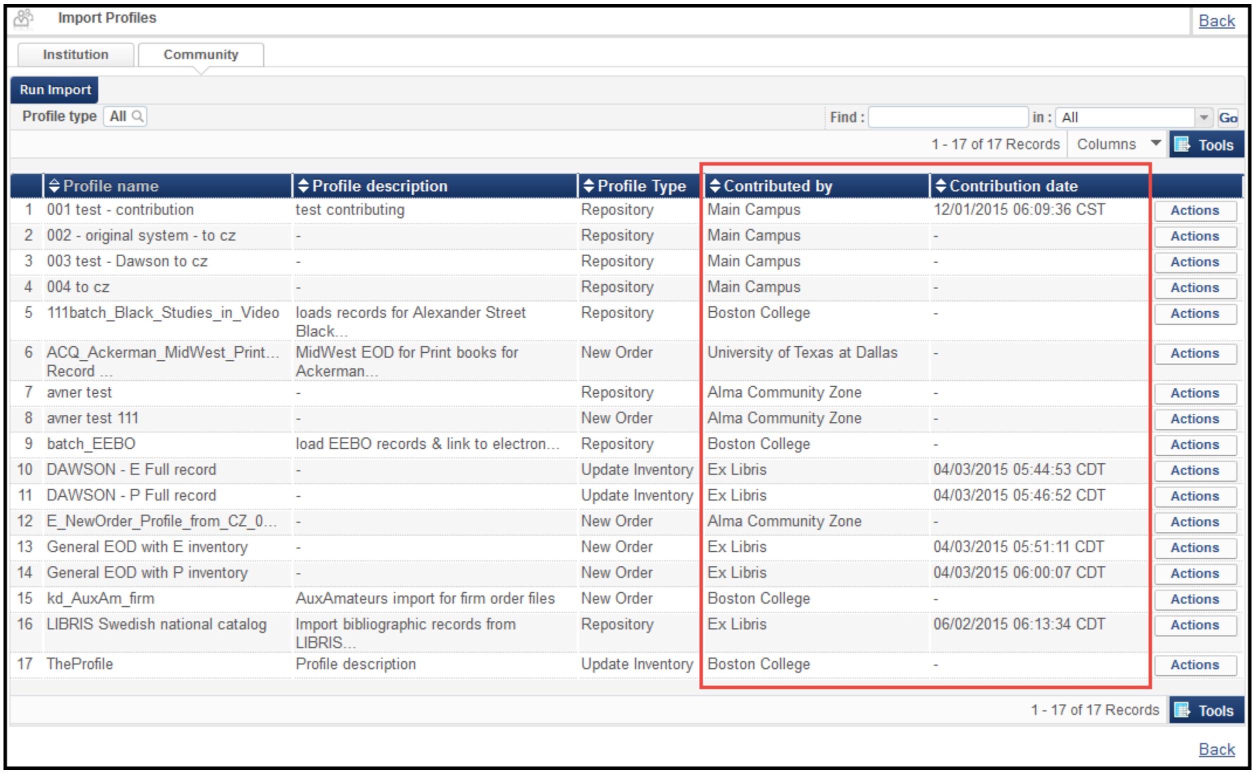
Description

Institutions spend many hours creating import profiles to import records from external systems. Many institutions integrate with the same external systems. In order for these institutions to save time and effort, librarians can now use import profiles that other institutions contribute to the Community Zone.

This feature includes the following procedures:

- Contribute an import profile to the Community Zone
- View the list of contributed import profiles
- Copy a contributed import profile to your institution
- Remove a contributed import profile

Contributed import profiles appear in the **Community** tab on the Import Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**). New columns **Contributed By** and **Contribution Date** appear in this tab. These columns display the source that contributed the import profile and the contribution date and time, respectively.



Import Profiles

Institution | Community

Run Import

Profile type: All — Find: — in: All — Go

1 - 17 of 17 Records — Columns — Tools

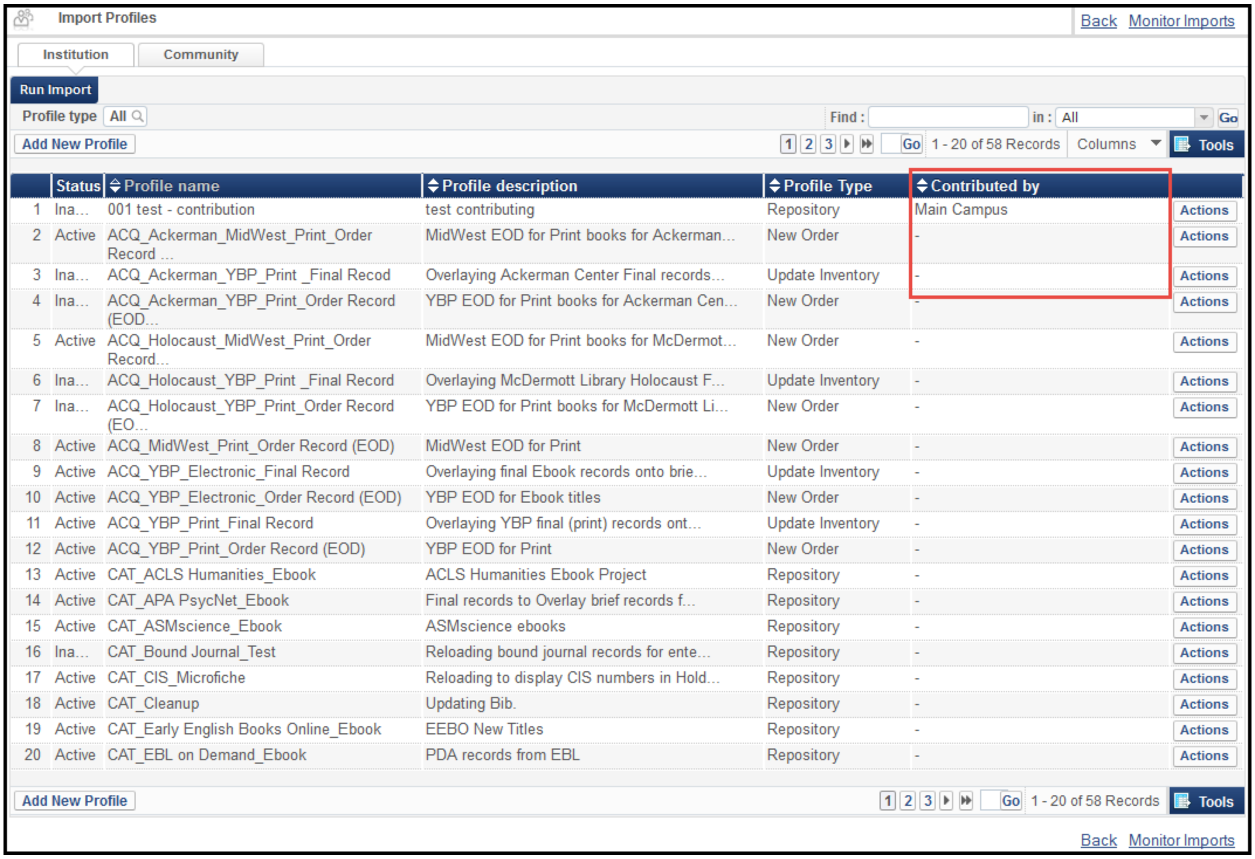
	Profile name	Profile description	Profile Type	Contributed by	Contribution date	
1	001 test - contribution	test contributing	Repository	Main Campus	12/01/2015 06:09:36 CST	Actions
2	002 - original system - to cz	-	Repository	Main Campus	-	Actions
3	003 test - Dawson to cz	-	Repository	Main Campus	-	Actions
4	004 to cz	-	Repository	Main Campus	-	Actions
5	111batch_Black_Studies_in_Video	loads records for Alexander Street Black...	Repository	Boston College	-	Actions
6	ACQ_Ackerman_MidWest_Print... Record ...	MidWest EOD for Print books for Ackerman...	New Order	University of Texas at Dallas	-	Actions
7	avner test	-	Repository	Alma Community Zone	-	Actions
8	avner test 111	-	New Order	Alma Community Zone	-	Actions
9	batch_EEBO	load EEBO records & link to electron...	Repository	Boston College	-	Actions
10	DAWSON - E Full record	-	Update Inventory	Ex Libris	04/03/2015 05:44:53 CDT	Actions
11	DAWSON - P Full record	-	Update Inventory	Ex Libris	04/03/2015 05:46:52 CDT	Actions
12	E_NewOrder_Profile_from_CZ_0...	-	New Order	Alma Community Zone	-	Actions
13	General EOD with E inventory	-	New Order	Ex Libris	04/03/2015 05:51:11 CDT	Actions
14	General EOD with P inventory	-	New Order	Ex Libris	04/03/2015 06:00:07 CDT	Actions
15	kd_AuxAm_firm	AuxAmateurs import for firm order files	New Order	Boston College	-	Actions
16	LIBRIS Swedish national catalog	Import bibliographic records from LIBRIS...	Repository	Ex Libris	06/02/2015 06:13:34 CDT	Actions
17	TheProfile	Profile description	Update Inventory	Boston College	-	Actions

1 - 17 of 17 Records — Tools

Back

Figure 18 - Import Profiles, Community Tab

A new column **Contributed By** appears in the **Institution** tab on the Import Profiles page. This column displays the source that contributed an import profile. The column displays contents only for copied profiles.



Import Profiles — Back | Monitor Imports

Institution | Community

Run Import

Profile type: All — Find: — in: All — Go

Add New Profile — 1 2 3 — Go — 1 - 20 of 58 Records — Columns — Tools

	Status	Profile name	Profile description	Profile Type	Contributed by	
1	Ina…	001 test - contribution	test contributing	Repository	Main Campus	Actions
2	Active	ACQ_Ackerman_MidWest_Print_Order Record …	MidWest EOD for Print books for Ackerman…	New Order	-	Actions
3	Ina…	ACQ_Ackerman_YBP_Print _Final Recod	Overlaying Ackerman Center Final records…	Update Inventory	-	Actions
4	Ina…	ACQ_Ackerman_YBP_Print_Order Record (EOD…	YBP EOD for Print books for Ackerman Cen…	New Order	-	Actions
5	Active	ACQ_Holocaust_MidWest_Print_Order Record…	MidWest EOD for Print books for McDermot…	New Order	-	Actions
6	Ina…	ACQ_Holocaust_YBP_Print _Final Record	Overlaying McDermott Library Holocaust F…	Update Inventory	-	Actions
7	Ina…	ACQ_Holocaust_YBP_Print_Order Record (EO…	YBP EOD for Print books for McDermott Li…	New Order	-	Actions
8	Active	ACQ_MidWest_Print_Order Record (EOD)	MidWest EOD for Print	New Order	-	Actions
9	Active	ACQ_YBP_Electronic_Final Record	Overlaying final Ebook records onto brie…	Update Inventory	-	Actions
10	Active	ACQ_YBP_Electronic_Order Record (EOD)	YBP EOD for Ebook titles	New Order	-	Actions
11	Active	ACQ_YBP_Print_Final Record	Overlaying YBP final (print) records ont…	Update Inventory	-	Actions
12	Active	ACQ_YBP_Print_Order Record (EOD)	YBP EOD for Print	New Order	-	Actions
13	Active	CAT_ACLS Humanities_Ebook	ACLS Humanities Ebook Project	Repository	-	Actions
14	Active	CAT_APA PsycNet_Ebook	Final records to Overlay brief records f…	Repository	-	Actions
15	Active	CAT_ASMscience_Ebook	ASMscience ebooks	Repository	-	Actions
16	Ina…	CAT_Bound Journal_Test	Reloading bound journal records for ente…	Repository	-	Actions
17	Active	CAT_CIS_Microfiche	Reloading to display CIS numbers in Hold…	Repository	-	Actions
18	Active	CAT_Cleanup	Updating Bib.	Repository	-	Actions
19	Active	CAT_Early English Books Online_Ebook	EEBO New Titles	Repository	-	Actions
20	Active	CAT_EBL on Demand_Ebook	PDA records from EBL	Repository	-	Actions

Add New Profile — 1 2 3 — Go — 1 - 20 of 58 Records — Tools

Back | Monitor Imports

Figure 19 - Import Profiles, Institution Tab

In addition, when viewing the profile, the **Sharing Details** area in the **Profile Details** tab includes information about who contributed the profile.

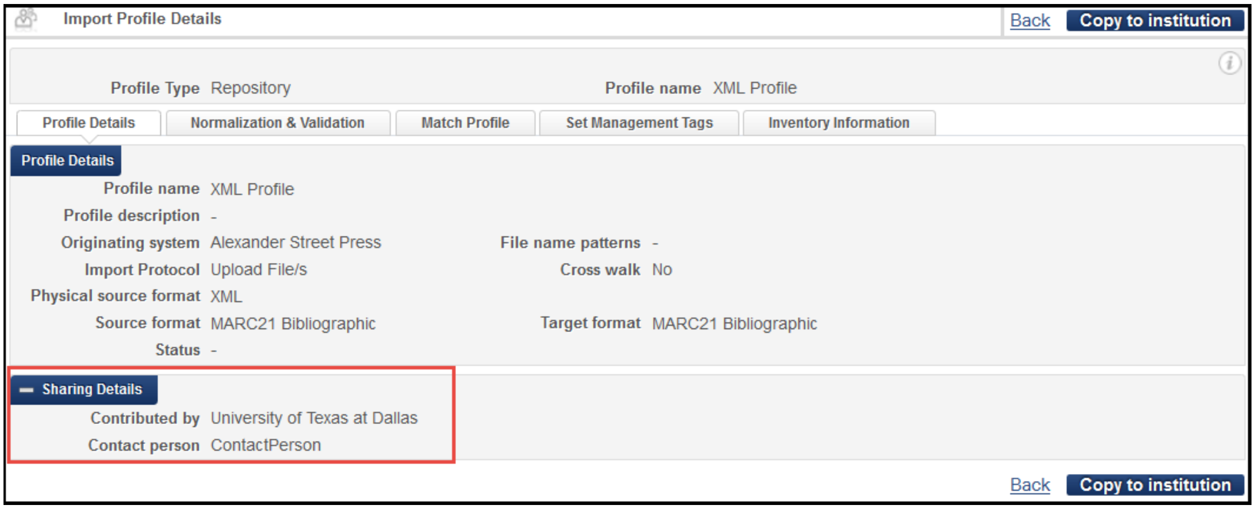


Figure 20 - Import Profile Details Page

Copying an import profile also copies the profile's associated normalization process, associated merge rule, scheduling option, and the indication rule and normalization rules associated with its normalization process. The normalization rules appear in the MD Editor with a note about their original contributor.

Step-by-Step Instructions

The following roles can contribute import profiles or manage contributed import profiles:

- Catalog Administrator
- General System Administrator
- Purchasing Manager
- Purchasing Operator
- Repository Administrator

To contribute an import profile to the Community Zone:

1 Select **Actions > Contribute** for an import profile on the **Institution** tab of the Import Profiles page.

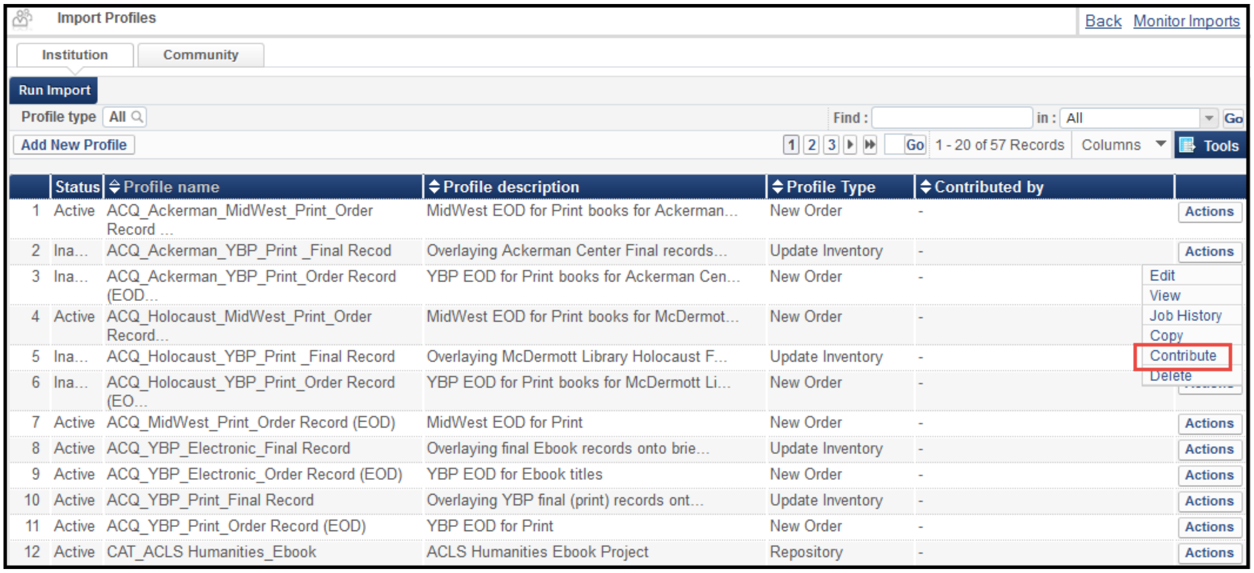


Figure 21 - Import Profiles Page

A confirmation message dialog box appears.

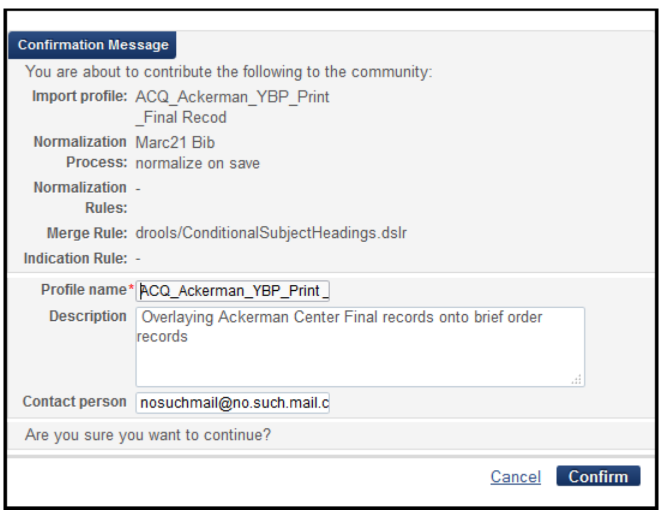


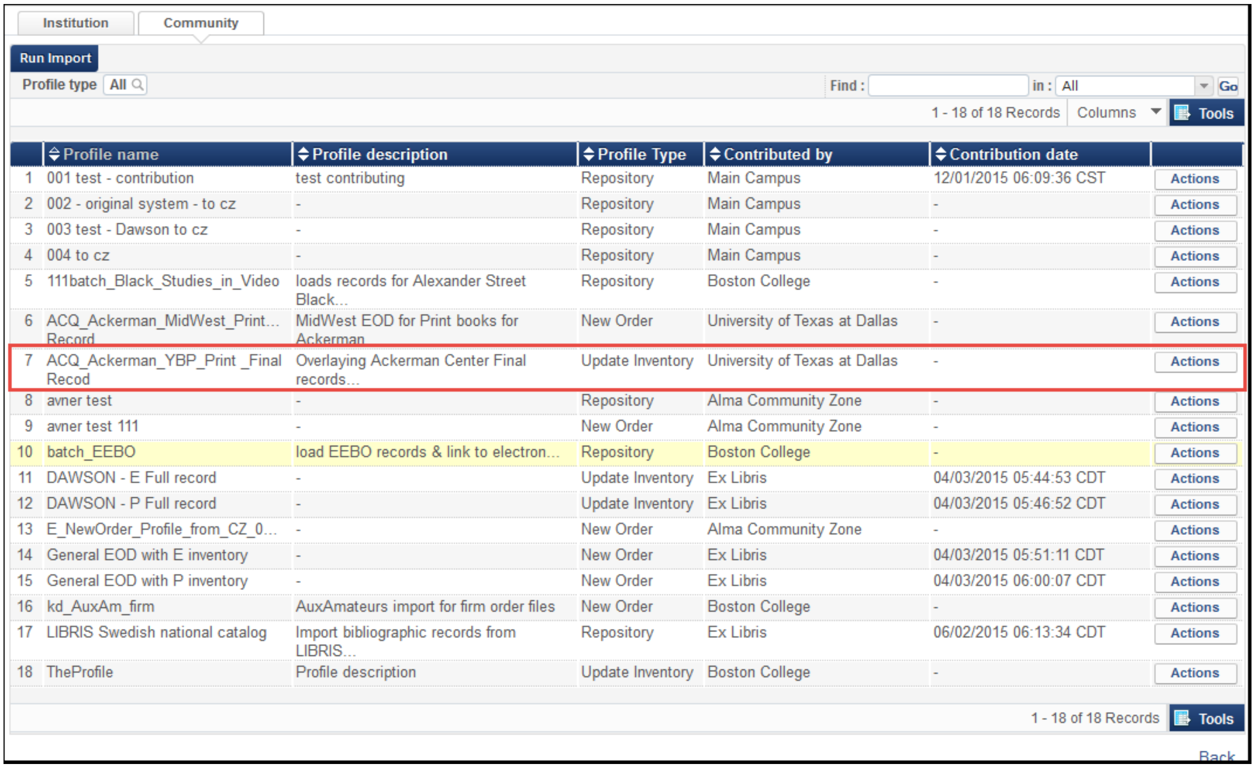
Figure 22 - Import Profile Contribution Confirmation Message

2 You can optionally change the **Profile name**.

3 It is recommended that you change the **Description** to include detailed informations for institutions that will copy the profile. Include institution information such as the library information, FTP information, and/or vendor information.

4 You can optionally enter or change an email address for the **Contact person**.

5 Click **Confirm**. The profile appears in the **Community** tab and can be copied by any institution.



	Profile name	Profile description	Profile Type	Contributed by	Contribution date	
1	001 test - contribution	test contributing	Repository	Main Campus	12/01/2015 06:09:36 CST	Actions
2	002 - original system - to cz	-	Repository	Main Campus	-	Actions
3	003 test - Dawson to cz	-	Repository	Main Campus	-	Actions
4	004 to cz	-	Repository	Main Campus	-	Actions
5	111batch_Black_Studies_in_Video	loads records for Alexander Street Black...	Repository	Boston College	-	Actions
6	ACQ_Ackerman_MidWest_Print... Record	MidWest EOD for Print books for Ackerman	New Order	University of Texas at Dallas	-	Actions
7	ACQ_Ackerman_YBP_Print _Final Recod	Overlaying Ackerman Center Final records...	Update Inventory	University of Texas at Dallas	-	Actions
8	avner test	-	Repository	Alma Community Zone	-	Actions
9	avner test 111	-	New Order	Alma Community Zone	-	Actions
10	batch_EEBO	load EEBO records & link to electron...	Repository	Boston College	-	Actions
11	DAWSON - E Full record	-	Update Inventory	Ex Libris	04/03/2015 05:44:53 CDT	Actions
12	DAWSON - P Full record	-	Update Inventory	Ex Libris	04/03/2015 05:46:52 CDT	Actions
13	E_NewOrder_Profile_from_CZ_0...	-	New Order	Alma Community Zone	-	Actions
14	General EOD with E inventory	-	New Order	Ex Libris	04/03/2015 05:51:11 CDT	Actions
15	General EOD with P inventory	-	New Order	Ex Libris	04/03/2015 06:00:07 CDT	Actions
16	kd_AuxAm_firm	AuxAmateurs import for firm order files	New Order	Boston College	-	Actions
17	LIBRIS Swedish national catalog	Import bibliographic records from LIBRIS...	Repository	Ex Libris	06/02/2015 06:13:34 CDT	Actions
18	TheProfile	Profile description	Update Inventory	Boston College	-	Actions

Figure 23 - Import Profiles, Community Tab

To view contributed import profiles:

You can view contributed import profiles in the **Community** tab of the Import Profiles page.

To view more information about a contributed import profile, select **Actions > View** for one of the profiles. The profile details appear.

To copy a contributed import profile to your institution:

1 Select **Actions > Copy** for an import profile in the **Community** tab of the Import Profiles page.

The import profile is copied to your institution and the new profile is opened for editing. The new profile appears in the **Institution** tab on the Import Profiles page. Its status is **Inactive** by default. The import profile's merge rule, normalization process, indication rule, and normalization rules are also copied to your institution.

2 Make any required changes and click **Save** to save the profile.

The new profile can be used like any other profile.

To delete contributed import profiles:

Select **Actions > Delete** beside the contributed import profile on the **Community** tab of the Import Profiles page, and click **Confirm** in the confirmation dialog box. The profile is removed from the list of contributed profiles.

You can delete only profiles that your institution previously contributed. Deleting a contributed profile has no effect on copies that were made of that profile.

Other Resource Management Enhancements

- When browsing call numbers (either by selecting **Browse Call Numbers** in the MD Editor or by selecting **Resource Management > Cataloging > Browse Shelf Listing**), the **Call number type** drop-down list now contains options for each $2 subfield of field 084 (and one for **Not Specified**), instead of one option for all of these subfields.

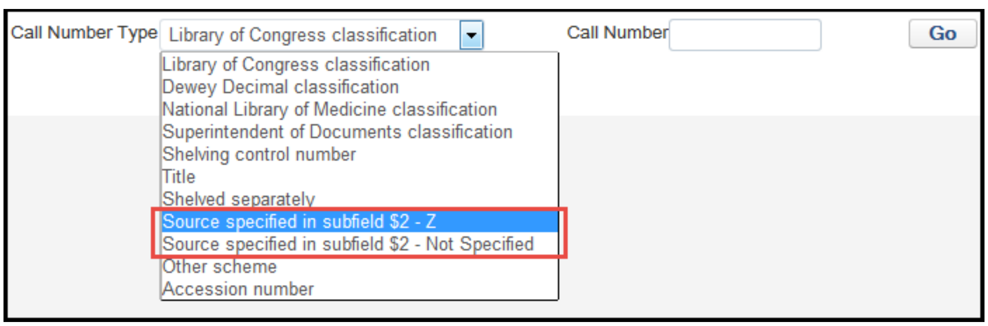


Figure 24 - Call Number Type Drop-down

- In the advanced search, the condition **Product Code** was renamed **Universal Product Code**.

- You are now asked for confirmation when deleting a sequence on the Inventory Number Configuration page (**Resource Management > Resource Configuration > Configuration Menu > General > Inventory Numbers**). Also on this page:
  - Fields are checked for valid values.
  - **Sequence Name**, **Padding**, and **Prefix** are now limited to 255 characters.
  - **Sequence Start** is now limited to 18 characters.
- You can now use the control form editor (Crtl-F) when editing a UNIMARC authority record (like you can when editing a UNIMARC bibliographic record).

Fulfillment

The following sections describe new or changed Fulfillment features in this release of Alma.

Aggregate Lost/Overdue Notifications

Description

Alma can be configured to send a single overdue or lost item notification to the patron listing all of the patron's overdue or lost loans. This can be used to replace the previous option where a notice was sent for each overdue or lost loan. Using this new option, the patron will receive a single notification for each notification type.

Activating the new option is done by setting the Fulfillment Other Settings configuration parameter **switch_to_overdue_and_lost_loan_new_job** to `True`. The name of existing **Loans – Change to Lost** job is changed **Loans – Overdue and Lost Item**.

Note: The previous option will be deprecated later this year with several months' notification in order to take any required actions.

Step-By-Step Instructions

The following roles can configure overdue and lost loan notifications and profiles:

- General System Administrator
- Fulfillment Administrator

To configure overdue and lost loan notifications:

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings** and locate the parameter **switch_to_overdue_and_lost_loan_new_job**. This value determines whether to aggregate the notifications or leave them as they are.

Mapping Table

Cancel Save

You are configuring: QA - Provisioning

Organization Unit List

Table Information

Sub System	INFRA	Table Name	Customer Parameters
Updated By	-	Last Updated	-
Table Description	Customer Parameters		

Mapping Table Rows

Tools

	parameter key	parameter module	parameter value	free text description	
1	auto_renew_loan_days	fulfillment	2	The days period to auto renew item_loans	Customize
2	check_self_ownership_serial	fulfillment	true	Should self ownership be checked for seri	Customize
3	demerit_enable	fulfillment	false	Whether the customer uses demerits	Restore
4	demerit_history_days	fulfillment	0	How many days back loan history is chec	Customize
5	demerit_maximum_threshold	fulfillment	0	Number of demerits after which user will (	Customize
6	demerit_suspension_days	fulfillment	0	Period of days for suspension	Customize
7	distribute_fulfill_changes_last_run	fulfillment		Last run time of the job	Customize
8	email_partner_configurable_line1	fulfillment			Customize
9	email_partner_configurable_line2	fulfillment			Customize
10	enable_moving_item_to_hold_shelf_from_self_che	fulfillment	false	Should requetsed item move to hold shelf	Customize
11	enable_request_during_loan_for_different_policy	fulfillment	false	When user has an active loan, enable him	Customize
12	exclude_lost_and_claimed_returned_loans_from_c	fulfillment	false	Exclude lost and claimed returned loans fi	Customize
13	fulfillment_network_shared_primo	fulfillment	false		Customize
14	generate_resource_sharing_temp_barcode	fulfillment	false		Customize
15	ignore_lender_due_date	fulfillment	false		Customize
16	ill_item_creation_lib_code	fulfillment	RES_SHARE		Customize
17	ill_item_creation_loc_code	fulfillment	OUT_RS_REQ		Customize
18	missing_item_requestable	fulfillment	false	Should missing items be requestable	Customize
19	network_rota_assignment_rules_precedence	fulfillment	false	Network Rota Assignment rules preceden	Customize
34	rs_default_pickup_location	fulfillment			Customize
35	rs_disable_lending_auto_assign	fulfillment	false	automatic assignment of lending request	Customize
36	rs_display_level_of_service	fulfillment	false	Display level of service field in getit	Customize
37	rs_prefer_recall_method	fulfillment	false		Customize
38	rs_support_add_service	fulfillment	true		Customize
39	send_courtesy_notices_and_handle_loan_renewal	fulfillment		Last run time of the job in UTC	Customize
40	send_query_to_patron_use_xsl	fulfillment	false		Restore
41	should_anonymize_borrowing_request	fulfillment	false	Should non active borrowing requests be a	Customize
42	should_anonymize_item_loan	fulfillment	false	Should returned loans be anonymized	Customize
43	should_anonymize_requests	fulfillment	true	Should requests in requests hisotry be an	Customize
44	should_automatically_print_request_slip	fulfillment	true	Flag whether to print request slip	Customize
45	switch_to_overdue_and_lost_loan_new_job	fulfillment	true	Switch change to lost job to overdue and	Restore
46	uresolver_display_cz_records_first	fulfillment	true	Should the packages in ViewIt be sorted s	Customize
47	uresolver_use_source_to_target_ordering	fulfillment	true	Should the packages in UResolver be sor	Restore
48	use_time_format_with_time_zone_in_self_check	fulfillment	true	Use a time format with time zone in self-c	Customize

Tools

Cancel Save

Figure 25 - Customer Mapping Table

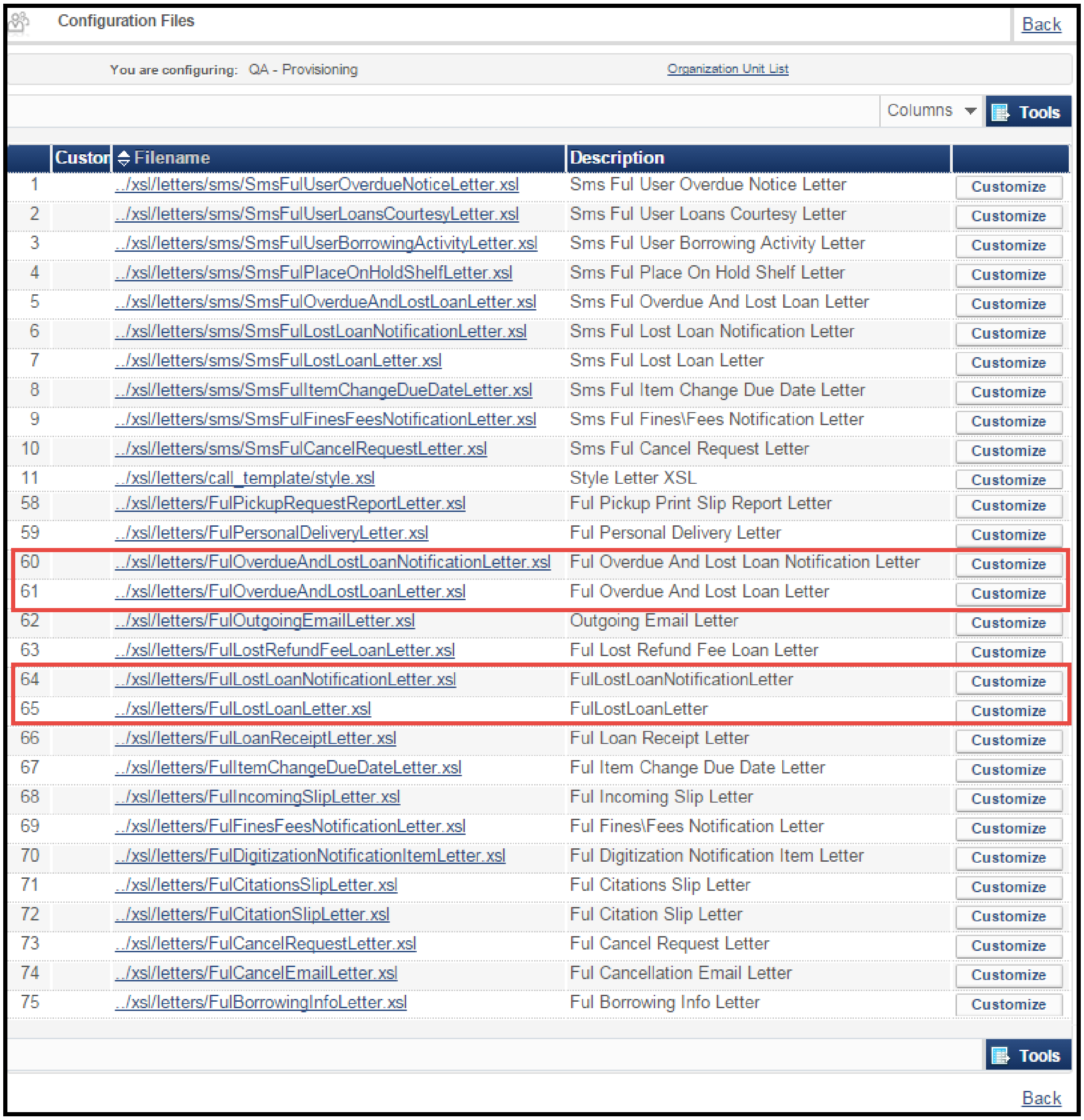
2 Click **Customize** and enter `True` in the **parameter value** field.

3 Click **Save**.

To configure overdue and lost loan letters:

Note: Configuration of the new letters is not mandatory, but it is recommended.

Access the Customize Letters page (**Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**).



Configuration Files Back

You are configuring: QA - Provisioning Organization Unit List

Columns Tools

Custor	Filename	Description	
1	../xsl/letters/sms/SmsFulUserOverdueNoticeLetter.xsl	Sms Ful User Overdue Notice Letter	Customize
2	../xsl/letters/sms/SmsFulUserLoansCourtesyLetter.xsl	Sms Ful User Loans Courtesy Letter	Customize
3	../xsl/letters/sms/SmsFulUserBorrowingActivityLetter.xsl	Sms Ful User Borrowing Activity Letter	Customize
4	../xsl/letters/sms/SmsFulPlaceOnHoldShelfLetter.xsl	Sms Ful Place On Hold Shelf Letter	Customize
5	../xsl/letters/sms/SmsFulOverdueAndLostLoanLetter.xsl	Sms Ful Overdue And Lost Loan Letter	Customize
6	../xsl/letters/sms/SmsFulLostLoanNotificationLetter.xsl	Sms Ful Lost Loan Notification Letter	Customize
7	../xsl/letters/sms/SmsFulLostLoanLetter.xsl	Sms Ful Lost Loan Letter	Customize
8	../xsl/letters/sms/SmsFulItemChangeDueDateLetter.xsl	Sms Ful Item Change Due Date Letter	Customize
9	../xsl/letters/sms/SmsFulFinesFeesNotificationLetter.xsl	Sms Ful Fines\Fees Notification Letter	Customize
10	../xsl/letters/sms/SmsFulCancelRequestLetter.xsl	Sms Ful Cancel Request Letter	Customize
11	../xsl/letters/call_template/style.xsl	Style Letter XSL	Customize
58	../xsl/letters/FulPickupRequestReportLetter.xsl	Ful Pickup Print Slip Report Letter	Customize
59	../xsl/letters/FulPersonalDeliveryLetter.xsl	Ful Personal Delivery Letter	Customize
60	../xsl/letters/FulOverdueAndLostLoanNotificationLetter.xsl	Ful Overdue And Lost Loan Notification Letter	Customize
61	../xsl/letters/FulOverdueAndLostLoanLetter.xsl	Ful Overdue And Lost Loan Letter	Customize
62	../xsl/letters/FulOutgoingEmailLetter.xsl	Outgoing Email Letter	Customize
63	../xsl/letters/FulLostRefundFeeLoanLetter.xsl	Ful Lost Refund Fee Loan Letter	Customize
64	../xsl/letters/FulLostLoanNotificationLetter.xsl	FulLostLoanNotificationLetter	Customize
65	../xsl/letters/FulLostLoanLetter.xsl	FulLostLoanLetter	Customize
66	../xsl/letters/FulLoanReceiptLetter.xsl	Ful Loan Receipt Letter	Customize
67	../xsl/letters/FulItemChangeDueDateLetter.xsl	Ful Item Change Due Date Letter	Customize
68	../xsl/letters/FulIncomingSlipLetter.xsl	Ful Incoming Slip Letter	Customize
69	../xsl/letters/FulFinesFeesNotificationLetter.xsl	Ful Fines\Fees Notification Letter	Customize
70	../xsl/letters/FulDigitizationNotificationItemLetter.xsl	Ful Digitization Notification Item Letter	Customize
71	../xsl/letters/FulCitationsSlipLetter.xsl	Ful Citations Slip Letter	Customize
72	../xsl/letters/FulCitationSlipLetter.xsl	Ful Citation Slip Letter	Customize
73	../xsl/letters/FulCancelRequestLetter.xsl	Ful Cancel Request Letter	Customize
74	../xsl/letters/FulCancelEmailLetter.xsl	Ful Cancellation Email Letter	Customize
75	../xsl/letters/FulBorrowingInfoLetter.xsl	Ful Borrowing Info Letter	Customize

Tools

Back

Figure 26 - Customize Letters

The old letters, **FulLostLoanNotificationLetter** and **FulLostLoanLetter**, are listed in addition to the new letters, **FulOverdueAndLostLoanNotificationLetter** and **FulOverdueAndLostLoanLetter**.

Note: The old letters, **FulLostLoanNotificationLetter** and **FulLostLoanLetter**, will be deprecated later this year with several months' notification in order to take any required actions.

User Anonymization for Fines/Fees

Description

A configuration parameter can be used to activate fines/fees anonymization. Anonymizing fines/fees will detach any closed (that is, fully paid or waived) fine/fee from the user record of the patron who owed it. Statistical patron information, such as User Group and User Statistics, will remain on the fine/fee record and be fully reportable in Analytics. Detaching a user from the fines/fees is an irreversible action.

When the option is selected, the patron information is detached from closed fines and fees by the **Fulfillment – Handle Historical Archiving** job. The job's report will also contain information on the fines and fees that were anonymized.

Step-By-Step Instructions

The following roles can configure fees anonymization:

- General System Administrator
- Fulfillment Administrator

To configure fees anonymization:

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**.

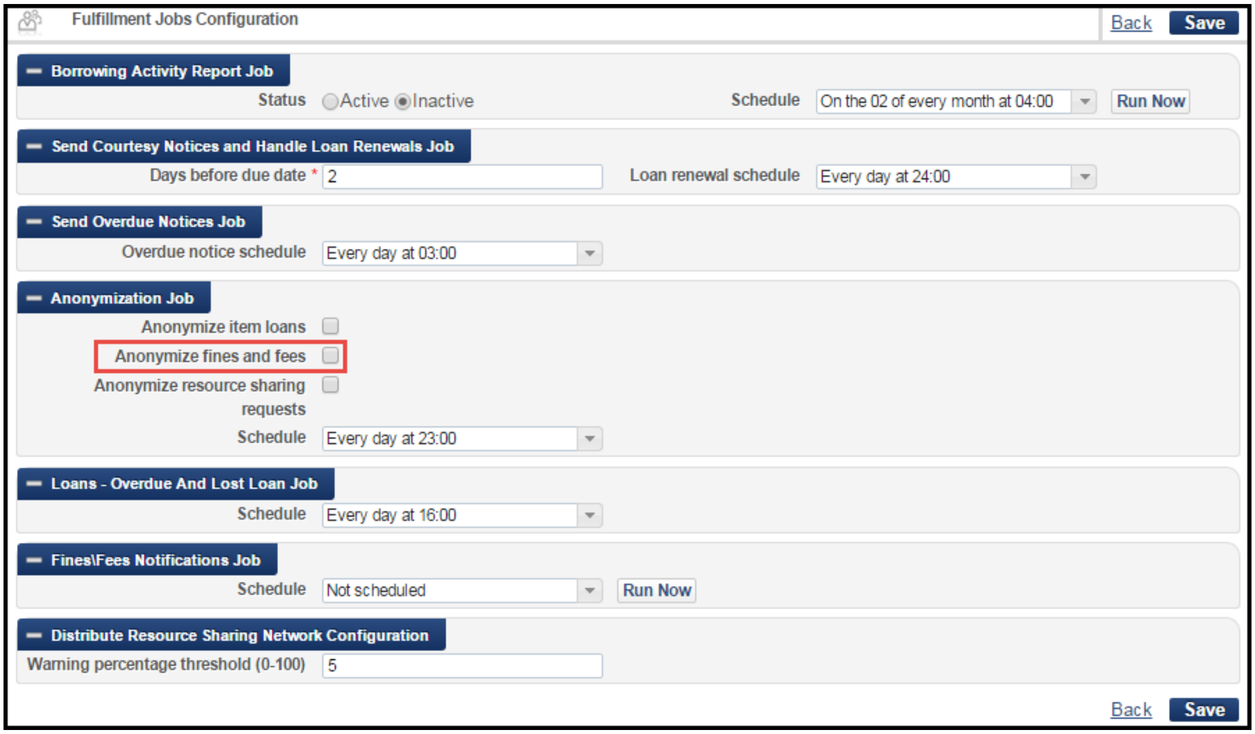


Figure 27 - Fulfillment Jobs Configuration Page

Anonymize fines and fees is cleared by default.

2 Select the check box to anonymize historical fines and fees.

3 Click **Save**.

Enhanced Digitization Workflow

Description

The staff workflow for processing digitization requests has been enhanced so that digitized files may be added to titles with the Alma Add Representation functionality, simplifying the digitization process. This development replaces the deposit workflow currently in use.

Step-By-Step Instructions

To configure digitization departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To manage the digitization of an item, you must have the following role:

- Work Order Operator (in the scope of a Digitization Department)

This development affects the digitization profile rules configured by an administrator and the digitization workflow performed by a digital librarian.

To configure the digitization profile rules:

1. Open the Digitization Workflow Setup page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Digitization Profile Rules> Add Rule**). The **Add digital inventory (representation)** option is now available under the Workflow setup section.

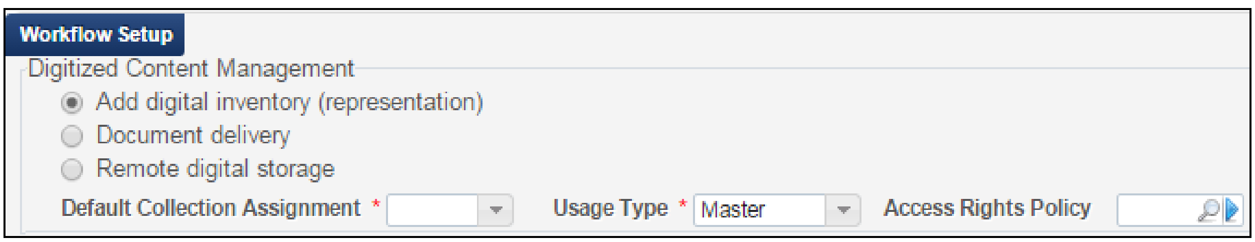


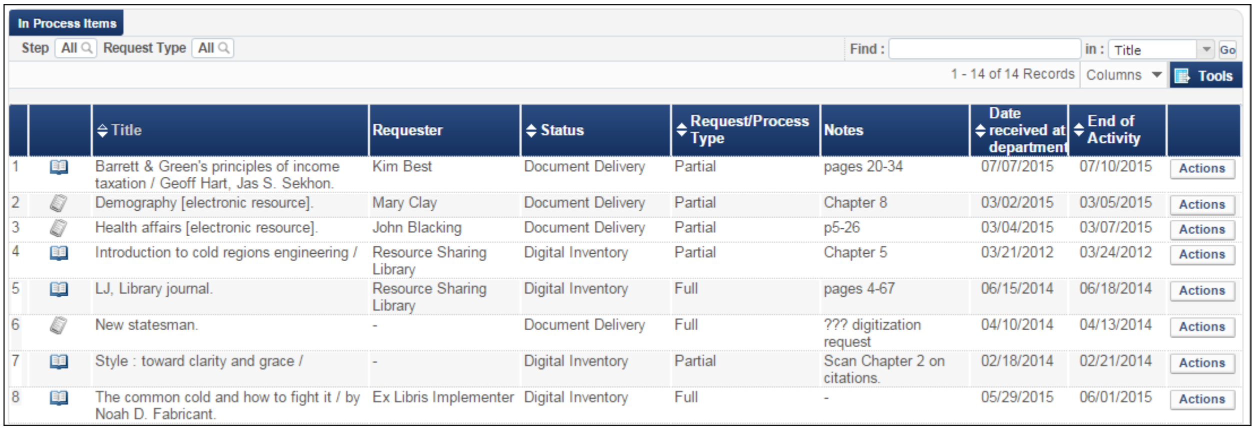
Figure 28 – Workflow Setup

2. Select **Add digital inventory (representation)**. The following fields appear:
   - **Default Collection Assignment** – Select the default collection to which to assign the title (if not already assigned).
   - **Usage Type** – Select whether the representation is the **Master** copy or a **Derivative**. (The master is the original copy and the derivative is, for example, a copy with a lower resolution.)
   - **Access Rights Policy** – Select the policy that defines the permissions that patrons have to request digital resources.

Note: The usage type and access rights policy can be changed when adding the digital file to the record, but the collection cannot.

To add a digitized item to a record:

1 When currently at a Digitization Department, open the In Process Items page (**Fulfillment > Resource Requests > Manage In Process Items**).



In Process Items

Step All Request Type All Find : in : Title Go

1 - 14 of 14 Records Columns Tools

		Title	Requester	Status	Request/Process Type	Notes	Date received at department	End of Activity	
1		Barrett & Green's principles of income taxation / Geoff Hart, Jas S. Sekhon.	Kim Best	Document Delivery	Partial	pages 20-34	07/07/2015	07/10/2015	Actions
2		Demography [electronic resource].	Mary Clay	Document Delivery	Partial	Chapter 8	03/02/2015	03/05/2015	Actions
3		Health affairs [electronic resource].	John Blacking	Document Delivery	Partial	p5-26	03/04/2015	03/07/2015	Actions
4		Introduction to cold regions engineering /	Resource Sharing Library	Digital Inventory	Partial	Chapter 5	03/21/2012	03/24/2012	Actions
5		LJ, Library journal.	Resource Sharing Library	Digital Inventory	Full	pages 4-67	06/15/2014	06/18/2014	Actions
6		New statesman.	-	Document Delivery	Full	??? digitization request	04/10/2014	04/13/2014	Actions
7		Style : toward clarity and grace /	-	Digital Inventory	Partial	Scan Chapter 2 on citations.	02/18/2014	02/21/2014	Actions
8		The common cold and how to fight it / by Noah D. Fabricant.	Ex Libris Implementer	Digital Inventory	Full	-	05/29/2015	06/01/2015	Actions

Figure 29 – In Process Items

The new status **Digital Inventory** appears instead of **Deposit**.

2 For an item with **Digital Inventory** status, select **Actions > Add digital inventory**. The following page appears:

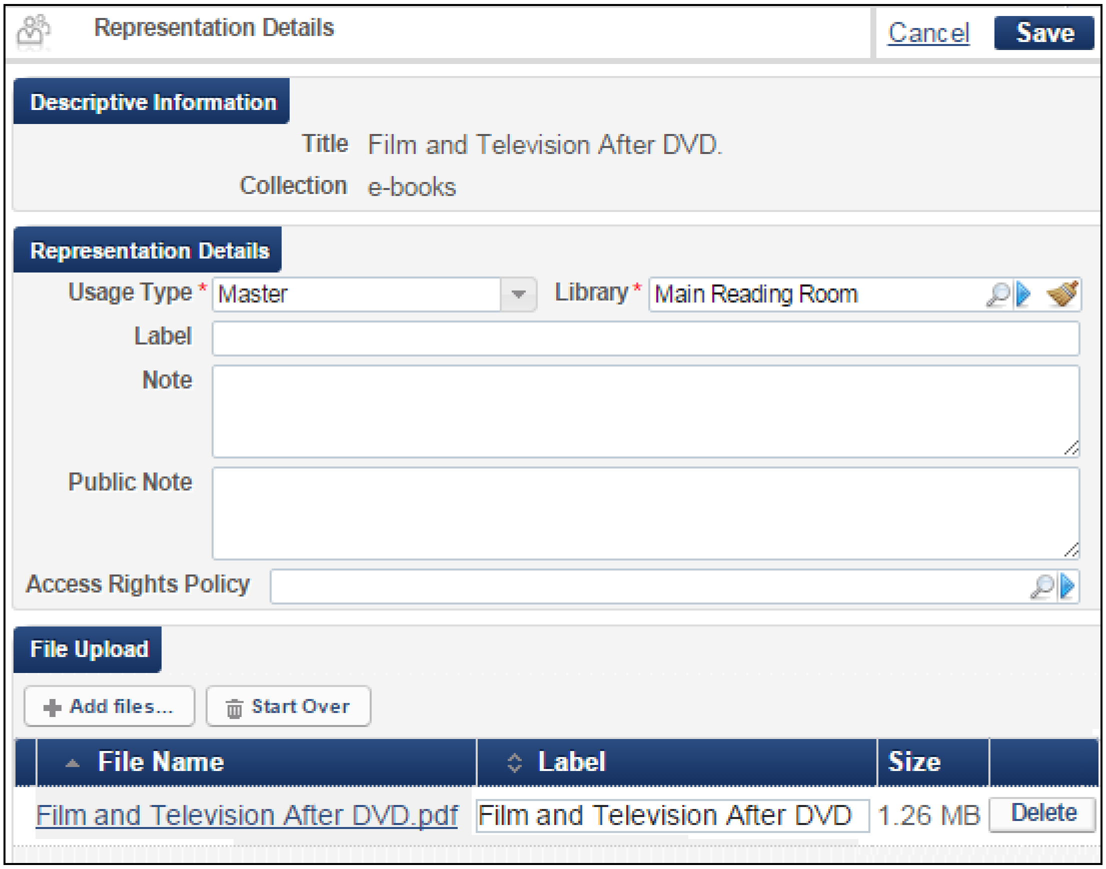


Figure 30 – Representation Details

3 Fill in the fields as described in the **Adding a Representation** section of the *Alma Online Help*.

4 Click **Add files** and select the digital version of the title.

The digital file is added to the bibliographic record of the item.

Other Fulfillment Enhancements

- When calculating the expiration date of a request for pickup, the transit time rules are now ignored and only the **Date Needed By** attribute is considered.

- In Manage Items Returns, when returning an item that has a note, there is now a **View Notes** action in the Action menu.

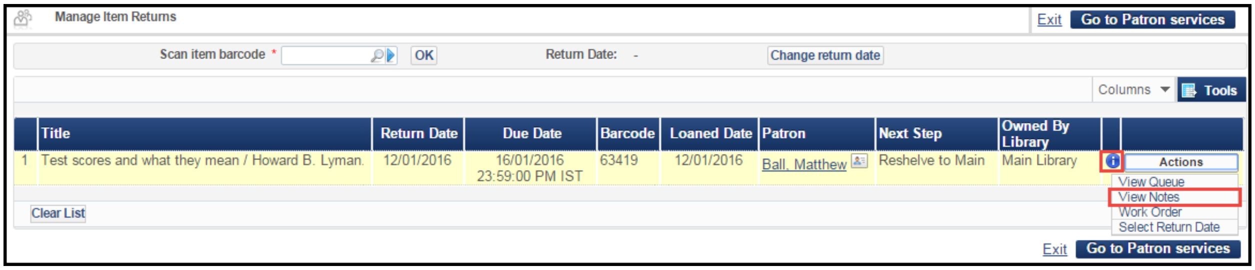


Figure 31 - Manage Item Returns Page

- The profile name was added to the XML that is created by the Fines/Fees Notification job, allowing greater customizability of the notification for a configured profile name. In addition, twenty rows were added to the letter's code table, allowing different notifications to be created for different profiles.
- Two columns were added to the print slip report on the pick from shelf task list: **Requester User Group** and **Process Date**. **Process Date** is the date on which the request status changed to **Pick from Shelf**.
- Patrons whose preferred language is Hebrew are now able to receive patron notifications in Hebrew.

Resource Sharing

The following sections describe new or changed Resource Sharing features in this release of Alma.

Mapping Alma Library Codes to External Library Codes for Libris ILL

Description

A new mapping table was created to map Alma library codes to library codes in external resource sharing systems. This mapping table can be used in conjunction with the resource sharing integration profile. This will enable customers using Libris ILL to map their pickup library codes to Alma codes so that resource sharing requests can be imported into Alma from Libris.

Step-By-Step Instructions

The following roles can configure library mapping:

- General System Administrator
- Fulfillment Administrator

To configure library mapping:

1. Access the Library Mapping page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Library Mapping**).

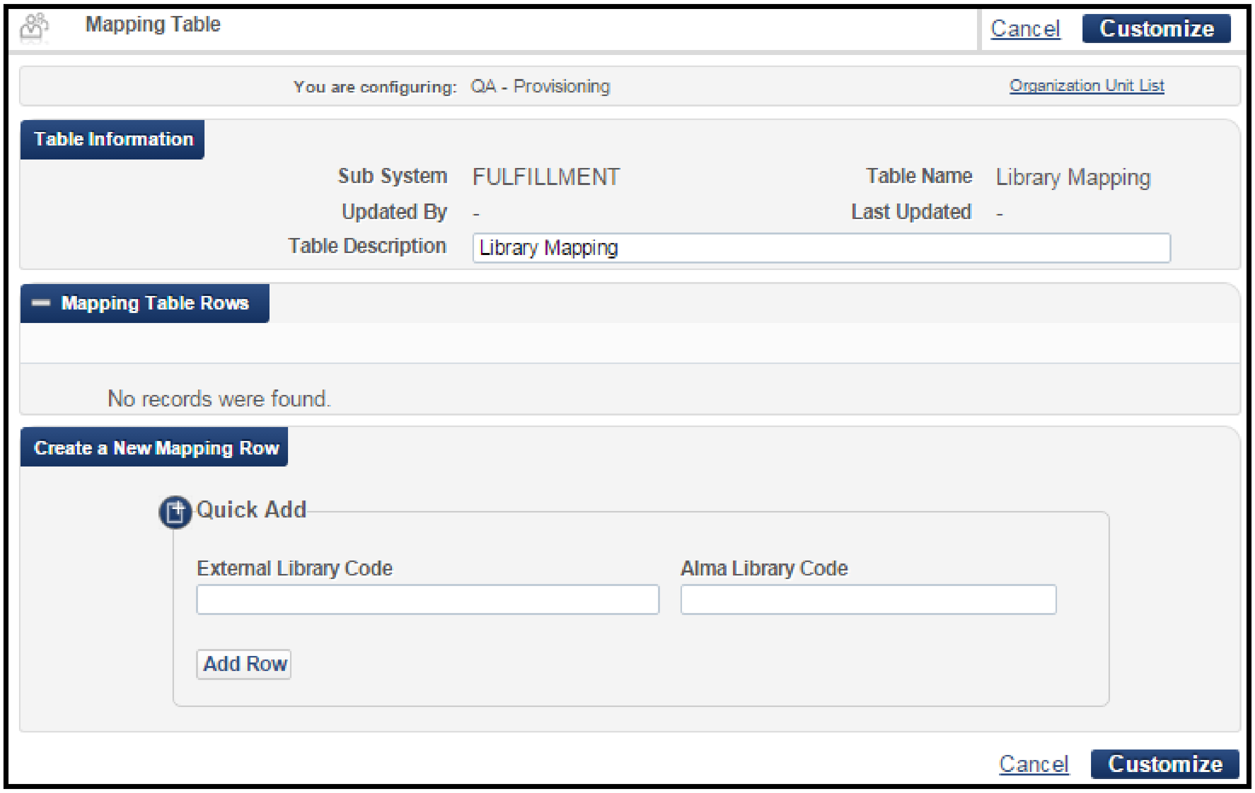


Figure 32 - Library Mapping Page

2 Enter the external library code and the Alma library code and click **Add Row**. When finished, click **Customize**.

Controlling the Borrower Ability to Use the Reject Option

Description

The library now has an option to turn off the **Reject** action for borrowing requests. This is particularly useful for ISO requests, where the rejection is expected to be received as a message sent by the lender.

The reject option is turned on by default for most customers. It is turned off by default for the Alliance Network libraries. In any case, if there is no partner on the request, the reject option is disabled. If the partner does not have a borrowing workflow assigned, the reject option is enabled.

Step-By-Step Instructions

The following roles can configure the visibility of the reject action:

- General System Administrator
- Fulfillment Administrator

To configure the visibility of the reject action:

1. Access **Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**.

Workflow Profiles | Cancel

Add Workflow Profile | Columns | Tools

	Workflow Profile	Type	Steps	
1	autoWorkflowProfile_2404131339_Borrowing	Borrowing	Cancel request not accepted,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Declared lost by partner,Renew requested,Report damaged item to partner,Report lost item to partner,Request accepted,Waiting for receive digitally	Actions
2	autoWorkflowProfile_2404131339_Lending	Lending	Cancel reply	Actions
3	autoWorkflowProfile_2411131457_Borrowing	Borrowing	Cancel request not accepted,Waiting for receive digitally,Waiting for cancel response,Request accepted,Report lost item to partner,Report damaged item to partner,Renew requested,Lender check in,Declared lost by partner,Cancelled by staff,Cancelled by partner,Cancelled By Patron,Reject	Actions
4	autoWorkflowProfile_2411131457_Lending	Lending	Cancel reply,Lender check in	Actions
5	Auto_WorkflowProfile_Default_Borrowing	Borrowing	Automatic renew,Waiting for receive digitally,Waiting for cancel response,Request accepted,Report lost item to partner,Report damaged item to partner,Renew requested,Manual renew,Lender check in,Declared lost by partner,Cancelled by staff,Cancelled by partner,Cancelled By Patron,Cancel request not accepted	Actions
6	Auto_WorkflowProfile_Default_Lending	Lending	Cancel reply,Staff renewal,Renewal response,Patron renewal,Lender check in	Actions

Figure 33 - Workflow Profiles

2 Remove the Reject option by clicking **Actions > Edit** and deselect the **Reject** option (Ctrl+Click).

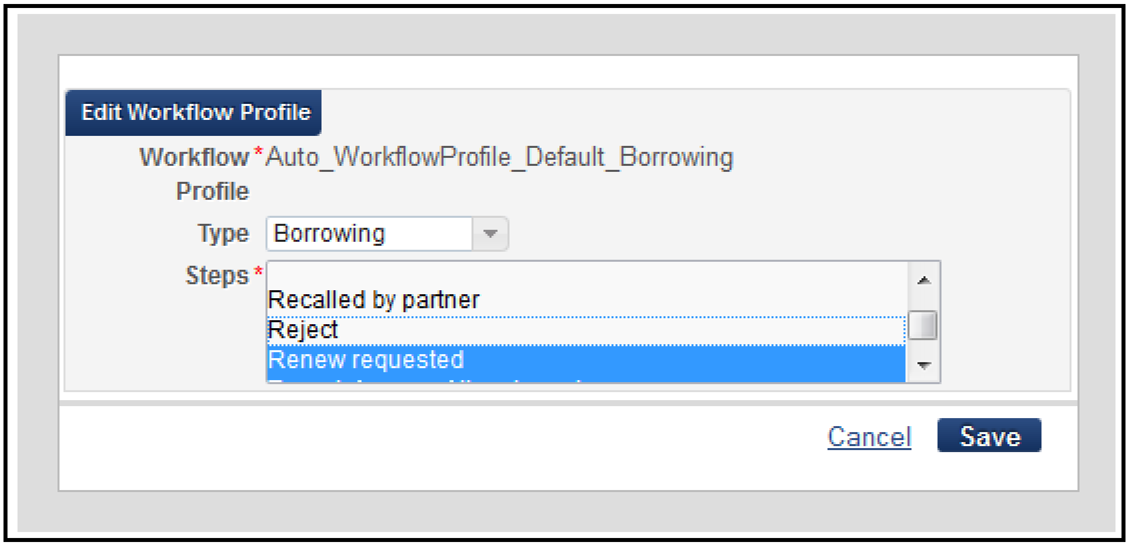
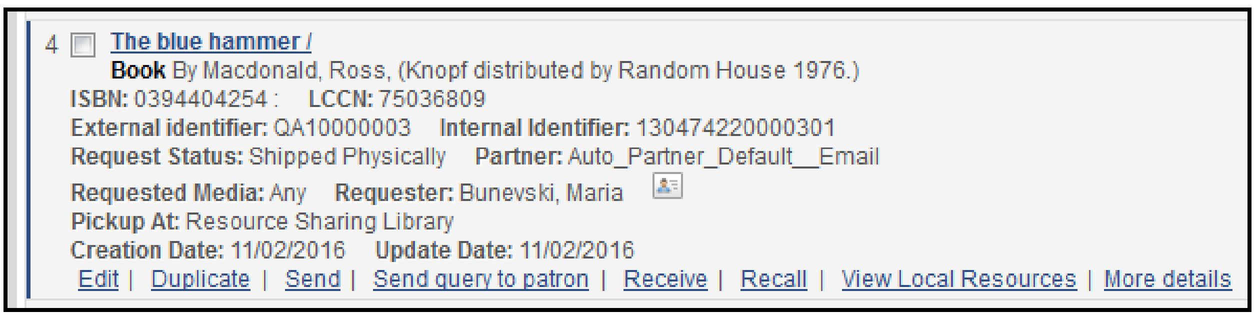


Figure 34 - Edit Workflow Profile

The Reject action is disabled on the borrowing request.



Other Resource Sharing Enhancements

- Shipping information and bibliographic level were added to the **ItemShipped** NCIP request.
- When you set the new Fulfillment configuration parameter **rs_auto_request_lending_with_volume_issue** to **false**, a move request is not automatically created for a lending request for an item that has a volume or issue because the move request may not identify the correct volume/issue. The default for this parameter is **true**,

which corresponds to the existing functionality. This parameter has no effect on items without a volume or issue.

Collaborative Networks

The following collaborative network enhancements were made for this release of Alma:

Local Authority Enhancements in the Network Zone

Description

Collaborative network members can now share the cataloging activity in relation to authority records that are managed centrally in the Network Zone by creating and editing authority records that are managed centrally in the Network Zone. When the parameters are set for members and the Network to manage local authorities, the following new capabilities are enabled:

- Searching for the authority Network Zone record from within the Institution Zone option
- Creating local authorities in the MD Editor using the new **Create Authority Record** button when there is no headings match (see Derive an Authority Record from a Headings in the Bibliographic Record)
- Using the new **Edit** link from authority search results to access editing an authority record
- Identifying the placement of new authority records in the MD Editor using **File > Options**
- Validating a member's local authority record using the new **Validate in Network Zone** option

Step-by-Step Instructions

The following roles can use the new options for maintaining centrally managed authority records in the Network Zone:

- Cataloger
- Catalog Manager
- Catalog Administrator

To maintain centrally managed authority records using the new option to add authority records for headings with no match:

(See the **Derive an Authority Record from a Bibliographic Record** section in these release notes for more information.)

1. Edit a Network Zone bibliographic record in the **MD Editor**.
2. Enter headings information in an appropriate field that you know does not exist in an authority record and press **F3**. The field displays in the normal manner with the addition of the new **Create Authority Record** button.
3. Click **Create Authority Record**. The new authority record is created and displays in the MD Editor in the side-by-side, split screen format.

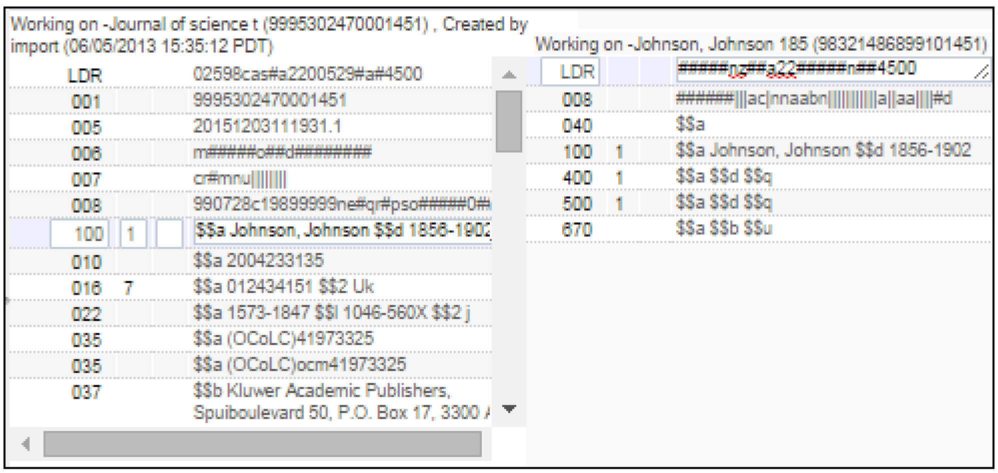


Figure 35 - Quick Authority Record Created in the Network Zone

The list of authority records also shows the new authority record that you created in the Network Zone.

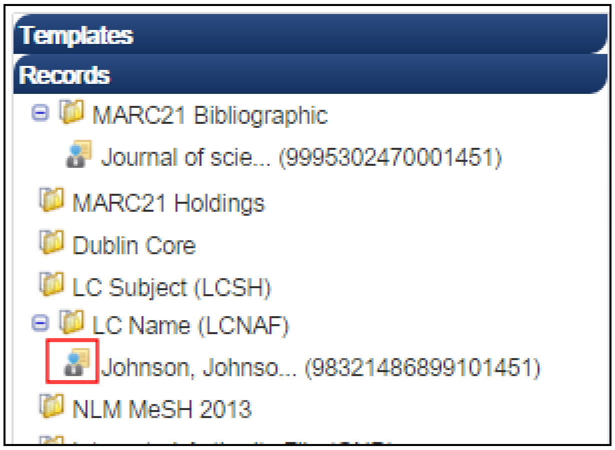


Figure 36 - List of Authority Records in the MD Editor Showing Network Zone Authority Records

Note: When you create authority records using **Create Authority Record** and the focus field when you pressed F3 is a non-preferred field such as the 600 field, the content is placed in the preferred field 100 in the new authority record that is created.

4 Complete processing the bibliographic record as you normally would.

To edit authority records from a repository search:

1 Open the **Repository Search** page (**Resource Management > Search and Sets > Repository Search**).

2 Select the **Network** tab.

3 In the **Find** drop-down list, select **Authorities**, enter your search criteria, and click **Go**. The search results appear with the new **Edit** link.

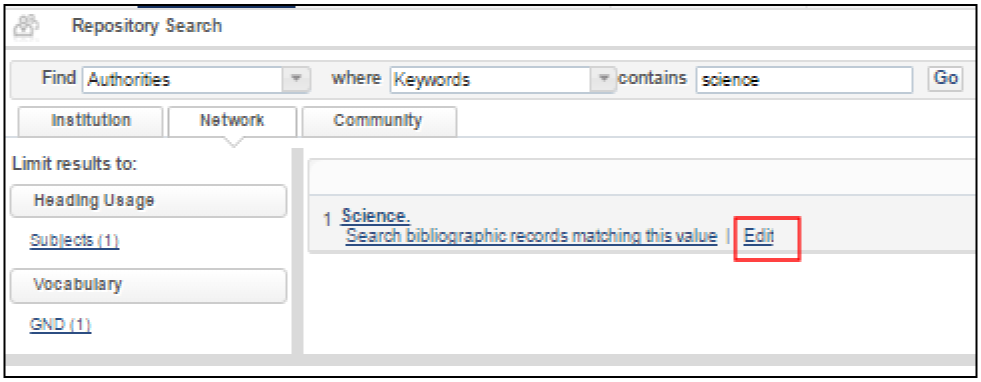


Figure 37 – Network Tab Authorities Search with the Edit Link in the Search Results

4 Click the **Edit** link for the authority record you want to edit. The record opens in the MD Editor.

5 Edit the record as you normally would.

To specify the placement of new authority records:

1 Open the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).

2 Select **File > Options**. The Options pop-up appears.

Figure 38 – Placement of New Authority Records Local or Network

3 For the new **Placement of new authority records**, select **Local** or **Network**. When you save authority records, this setting determines how the authority record is saved, if it is saved as an Institution record or if it is saved as a shared Network Zone record.

4 Click **Save**.

To validate member local authority records using the Network's validation options:

1 Open a member local authority record in the **MD Editor** (**Resource Management > Cataloging > Open Metadata Editor**).

2 Select **Tools > Validate in Network Zone**.

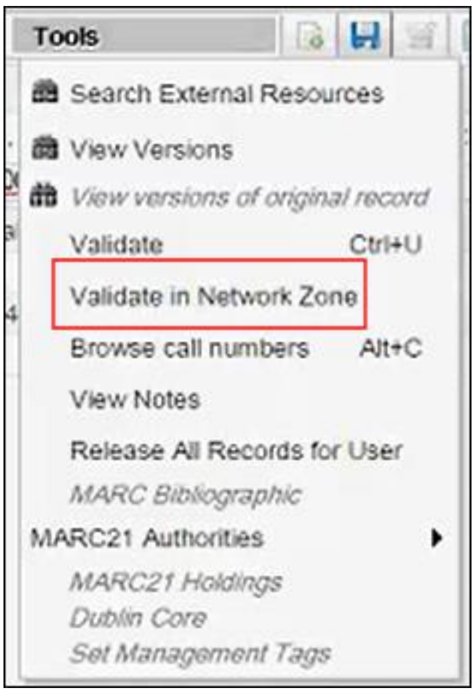


Figure 39 – Validate in Network Zone

Administration

The following enhancements were made in the Administration functional area for this release of Alma:

- Passwords of internal users are now accessible only to users whose role includes the new **USER_MANAGER_UPDATE_PASSWORD** privilege. The privilege was added by default only to the following roles:
  - User Manager
  - User Administrator

  All other roles that have been previously able to access user records and update passwords will now be limited to update only records of users that are patrons only—that is, have no role other than **Patron**.

  To change this default, contact Ex Libris Support.

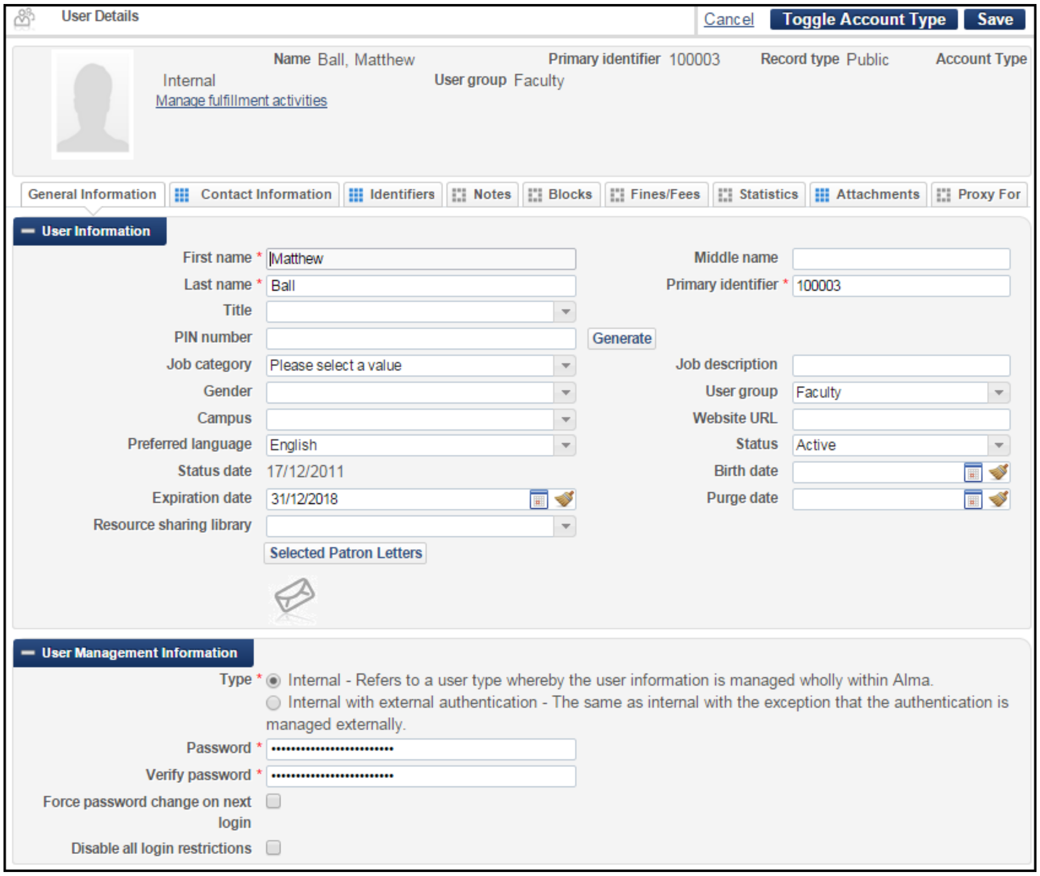


Figure 40 - User with Privilege to Update Password

Users that have the privilege **USER_MANAGER_UPDATE** (which previously controlled the password), but not the new privilege, may now update the password only for patrons.

If the user cannot update the password, the following fields are hidden:

- Password
- Verify password
- Force password change on next login
- Disable all login restrictions

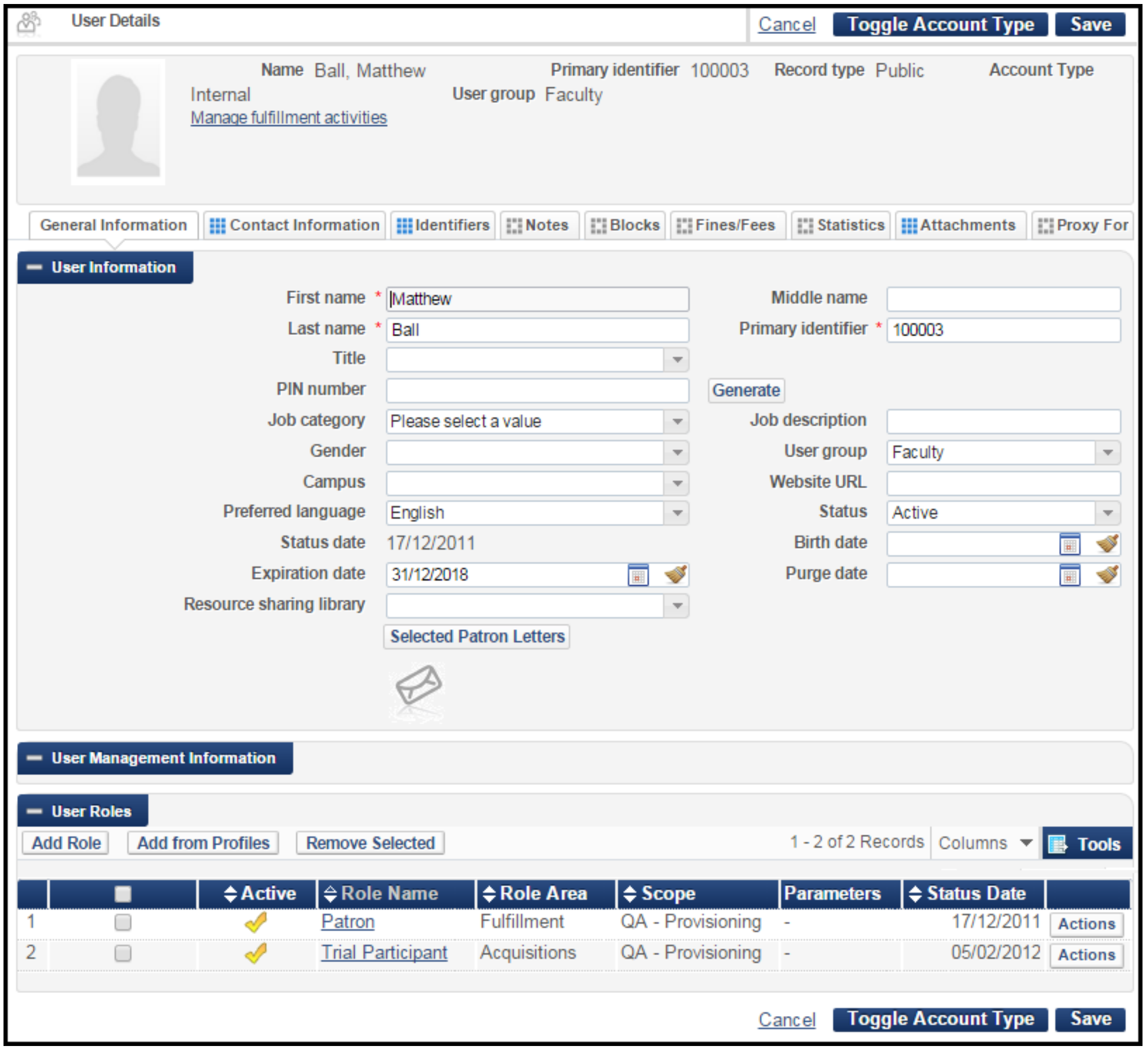


Figure 41 - User Without Privilege to Update Password

- A new privilege **CONSORTIAL_SERVICES_PRIVILEGE**, was added to the following roles:
  - Circulation Desk Manager
  - Circulation Desk Operator
  - Circulation Desk Operator-Limited
  - User Manager

    - User Administrator

    The functionality of **Find users** and **Find item in another institution** are now based on this privilege.

- To improve performance, the **Query Timeout** parameter was removed from the second page of the Add Integration Profile wizard for the Resolver Augmentation integration type.
- Additional scheduling options were added to the Remote Storage and SIS User synchronization jobs.

Analytics

The following sections describe new or changed Analytics features in this release of Alma.

Added Permanent Call Number and Fulfillment Note Fields to Physical Items Details Dimension

The **Permanent Call Number** and **Fulfillment Note** fields have been added to the shared Physical Item Details dimension of the Fulfillment subject area and the **Fulfillment Note** field has been added to Physical Item Details dimension of the Requests subject area. In addition, the Physical Item Details dimension has been added to the Lending Requests subject area.

These fields allow you to create a report of lending requests that have been shipped but not returned.

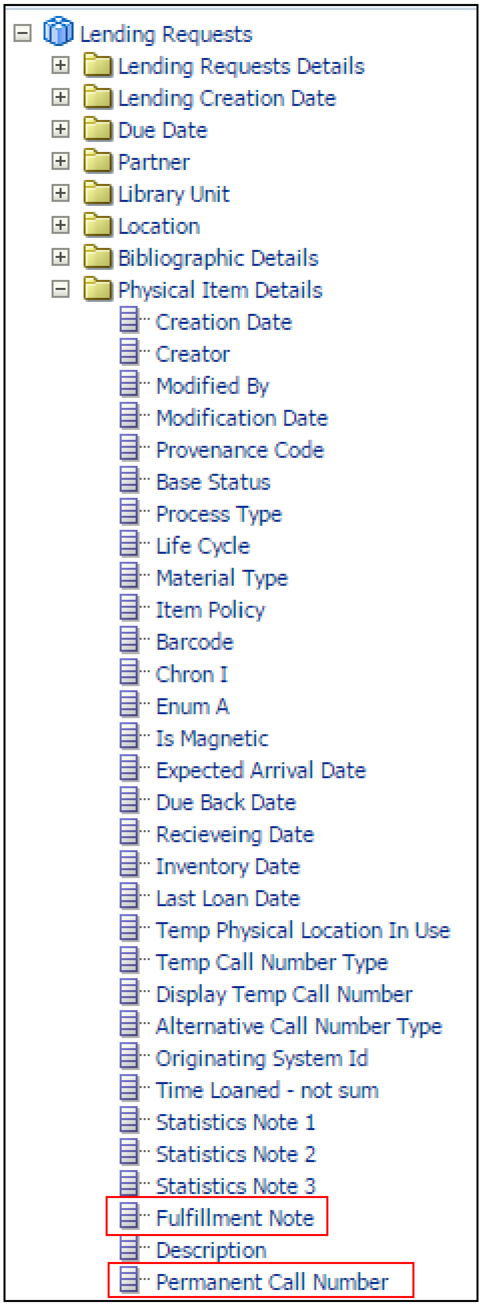


Figure 42 – Fulfillment Note and Permanent Call Number

The following is an example of a report using the Fulfillment Note and Permanent Call Number fields:

Compound Layout

Fulfillment Note	Permanent Call Number	# of requests
1 DVD ; 1 Blu-Ray disc ; 1 insert	DVD7120	2
1 DVD ; 1 Blu-ray	DVD5319	2
	DVD5683	2
	DVD5787	2
	DVD5964	2
1 DVD ; 1 CD	DVD4457	1
1 DVD disc ; 1 sound cisc	DVD5707	2
1 book ; 1 booklet	D545.S7 S23 2013	2
1 book, 26 stimulus cards	TST028	2
1 booklet	BL51 .K66 2006	1
	DVD5356	2
	DVD5697	2
	DVD5698	2
	DVD5703	2
	DVD5704	2
	DVD6586	2

Figure 43 – Fulfillment Note and Permanent Call Number Report

User Anonymization for Fines/Fees

When fines/fees anonymization has been activated, closed fines/fees (those that are fully paid or waived) will be detached from the user record of the patron who owed it. Statistical patron information, such as User Group and User Statistics, will remain on the fine/fee record and be fully reportable in Analytics.

User Group	First Name	Last Name	Original Amount	Fine Fee Status
BC Alumni			56,229	Closed
BC Doctoral			152,524	Closed
BC Faculty			486,910	Closed
BC Law Faculty			40,743	Closed
BC Law Student			31,573	Closed
BC Master's			172,488	Closed
BC Staff			419,434	Closed
BC Undergraduate			454,008	Closed
BLC			5,835	Closed
BLC Navigator (NRE)			12,405	Closed
BTI			5,165	Closed
College of Advancing Studies			35,172	Closed
Cross Registered			18,994	Closed
Graduating			618,066	Closed
Graduating Law			35,060	Closed
Guest			9,755	Closed
Interlibrary Loan			4,750	Closed
Law Carrel			1,435	Closed
Law Cite Check			520	Closed
Post Doctoral Student			0	Closed
Presidential Scholar			1,045	Closed
University VIP / Privileged User			284,247	Closed

Figure 44 - Fines and Fees with User Information Anonymized

Added Lifecycle Field to Portfolio Dimension

The **Lifecycle** field has been added to the Portfolio dimension of the E-Inventory subject area. This allows you to filter reports by Active/Deleted items. To support this new field, the **No. of Portfolio (Deleted + In Repository)** field has been added and the **No. of Portfolio** field has been renamed **No. of Portfolio (In Repository)**.

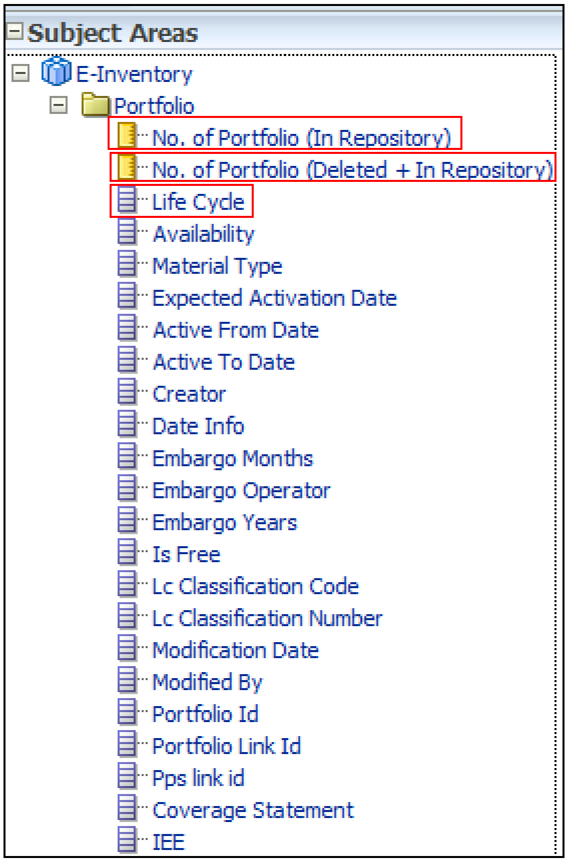


Figure 45 – Life Cycle, No. of Portfolio (In Repository), and No of Portfolio (Deleted + In Repository) Fields

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

Table

No. of Portfolio (In Repository)	No. of Portfolio (Deleted + In Repository)	Life Cycle
0	3	Deleted
36,873	36,873	In Repository

Figure 46 – Life Cycle, No. of Portfolio (In Repository), and No of Portfolio (Deleted + In Repository) Report

Other Analytics Enhancements

- The **Request Time** field was added to the Request Date dimension of the Requests subject area. This field allows you to create reports such as the number of requests by hour at the circulation desk.

Alma Usability

The following sections describe new or changed usability-related features in this release of Alma.

Added Option to Export All Fields of Modified Table to Excel

When exporting a table with hidden columns to Excel, you can now choose to export only the visible columns or all of the columns, including the hidden ones.

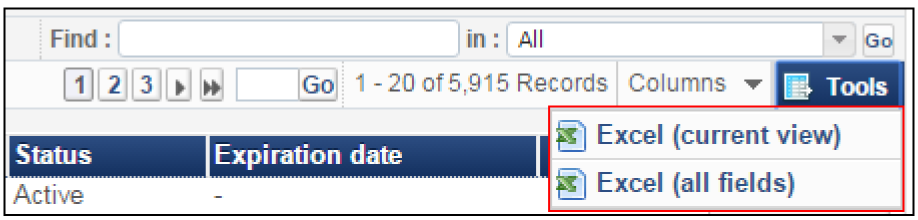


Figure 47 – Export All Fields

Inventory Number and Inventory Price Columns Available for List of Items

The **Inventory Number** and **Inventory Price** fields can now be displayed in the List of Items page from the **Columns** button and can be exported to Excel from the **Tools** button.

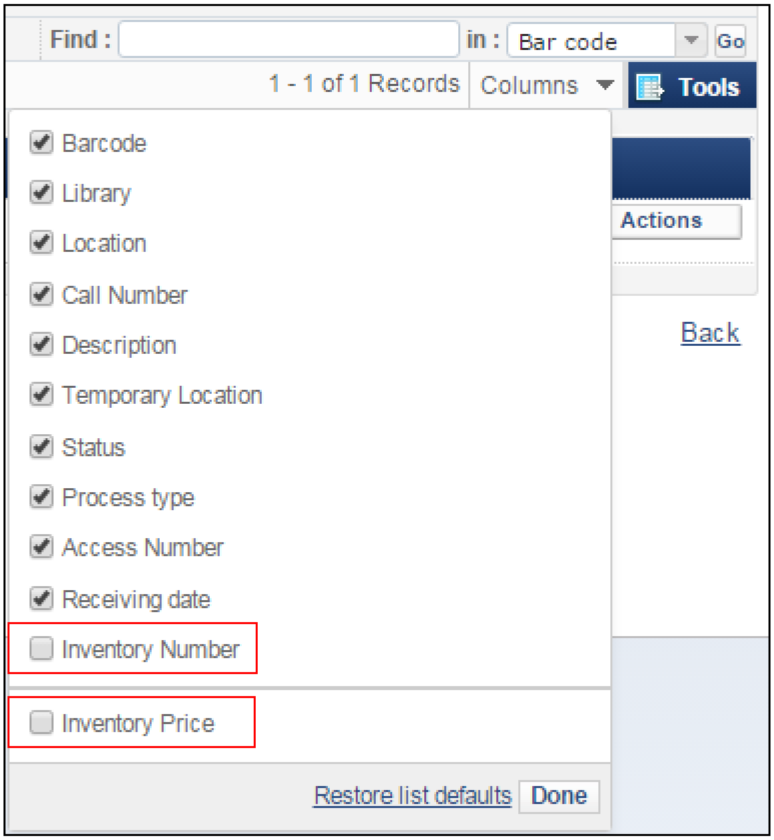


Figure 48 –Inventory Number and Inventory Price

Keyboard Shortcuts Added to Alma UI

The following keyboard shortcuts have been added to the Alma UI. A tooltip with the shortcut appears when hovering over the button.

- General Actions
  - Back – Alt+B
  - Next – Alt+N
  - Edit – Alt+E
  - Save – Alt+S

    - Cancel/Close – Alt+C
    - Cancel/Close (for popups) – Esc / Alt+C
- List Navigation
    - Next – Alt+>
    - Previous – Alt+<
    - First page – Alt+[
    - Last page – Alt+]
    - Find (focus on input box above list) – Alt+\

Other Usability Enhancements

- A new **View** option has been added under the **Actions** button for attachments that are in HTML or XML format. The attachments open in a new tab in your browser. Previously, only a **Download** option was available.
- This release incorporates several enhancements to the MD Editor that include input from the Idea Exchange related to viewing inventory. See MD Editor Usability Enhancements above.

Alma APIs

For this release, the following API enhancements were made:

- The Retrieve PO Lines API was expanded to retrieve both locations and notes. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/acq.
- An API was created to retrieve a call slip for a given request or item, or list of call slips for a circulation desk. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/taskslists.
- When using an API to create a bibliographic record linked to a Network Zone record and a link to the Network Zone record already exists, the API now returns a redirect header with a URL pointing to the existing record.

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.

Data Services

The Alma January 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 January 4th through January 31st:

- Number of records updated: 105
- Number of records added: 199
- Number of records deleted: 26

The following are the Library of Congress Name authority updates for the period of January 4th through January 31st:

- Number of records updated: 12448
- Number of records added: 18697
- Number of records deleted: 292

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone from January 3rd 2016 through January 31st 2016:

- Bacon BMJ France Istexjournals
- Bacon Brill France Istexjournals
- Bacon Brill France Istexradi
- Bacon Classiques Garnier Numérique Global Colacademie2

- Bacon Classiques Garnier Numérique Global Colbasile
- Bacon Classiques Garnier Numérique Global Colbayle
- Bacon Classiques Garnier Numérique Global Colbdl
- Bacon Classiques Garnier Numérique Global Colbrunet
- Bacon Classiques Garnier Numérique Global Colclf
- Bacon Classiques Garnier Numérique Global Colclm
- Bacon Classiques Garnier Numérique Global Colcorpusbayle
- Bacon Classiques Garnier Numérique Global Colcorpusdictionnaires
- Bacon Classiques Garnier Numérique Global Colcorpuslitteraire
- Bacon Classiques Garnier Numérique Global Colcritiquelitteraire
- Bacon Classiques Garnier Numérique Global Coldic01
- Bacon Classiques Garnier Numérique Global Coldicbayle
- Bacon Classiques Garnier Numérique Global Colecritsart
- Bacon Classiques Garnier Numérique Global Colfuretiere
- Bacon Classiques Garnier Numérique Global Colgodefroy
- Bacon Classiques Garnier Numérique Global Colgrammaires
- Bacon Classiques Garnier Numérique Global Colgrammaires16
- Bacon Classiques Garnier Numérique Global Colgrammaires17
- Bacon Classiques Garnier Numérique Global Colhuguet
- Bacon Classiques Garnier Numérique Global Collacurne
- Bacon Classiques Garnier Numérique Global Collarousse
- Bacon Classiques Garnier Numérique Global Collittre
- Bacon Classiques Garnier Numérique Global Colmontaigne
- Bacon Classiques Garnier Numérique Global Coloceanindien
- Bacon Classiques Garnier Numérique Global Colpatrologie

- Bacon Classiques Garnier Numérique Global Colremarques
- Bacon Classiques Garnier Numérique Global Colrevolempire
- Bacon Classiques Garnier Numérique Global Colrichelet
- Bacon Classiques Garnier Numérique Global Colyverdon
- Bacon Classiques Garnier Numérique Global Garnier
- Bacon De Gruyter France Istexjournals
- Bacon Institute Of Physics Publishing France Istexjournals
- Bacon NPG France Istexjournals
- Bacon Oxford University Press France Istexjournals
- Bacon Royal Society of Chemistry France Istexjournals
- Bacon Sage Publications France Istexjournals
- Bacon Springer France Istexjournals
- Bacon Wiley France Istexjournals
- CRCnetBASE Complete
- ebrary Academic Complete Subscription UKI Edition
- ebrary Education Subscription
- ebrary Law Subscription
- ebrary Literature & Language Subscription
- ebrary Science & Technology Subscription
- ebrary: The Arts Subscription
- IEEE Xplore All Power & Energy Standards
- IEEE Xplore MIT Press Journals Library
- IEEE Xplore National Electrical Safety Code (NESC)
- IEEE Xplore POP 1998
- IEEE Xplore POP 2005

- IEEE Xplore Smart Grid Research
- IEEE Xplore SMPTE Standards
- IEEE Xplore Standards Foundations for Smart Grid
- IEEE Xplore Standards Select
- JUSTICE American Chemical Society All Publication 2016
- JUSTICE Karger Online Journal Collection 2016
- Lyrasis SpringerLink Journals Tons
- Lyrasis SpringerLink Journals Upgrade
- man_Elsevier_lbw
- man_EZB: American Chemical Society
- man_EZB: American Institute of Physics (AIP) (Archive)
- man_EZB: American Physical Society Digital Backfile Archive
- man_EZB: Annual Reviews (Archive)
- man_EZB: Berkeley Electronic Press Academic Journals
- man_EZB: Blackwell Publishing Journal Backfiles
- man_EZB: Brill Journal Archive Online
- man_EZB: British Periodicals Collection
- man_EZB: China Academic Journals CAJ
- man_EZB: Columbia International Affairs Online (CIAO)
- man_EZB: Economist Historical Archive 1843 - 2006
- man_EZB: Financial Times Historical Archive 1888-2006
- man_EZB: Informa Healthcare
- man_EZB: Institute of Physics (IOP) (Archive)
- man_EZB: IUCR
- man_EZB: Konsortium Baden Württemberg Wiley

- man_EZB: Konsortium Baden-Württemberg Springer
- man_EZB: Lippincott Williams & Wilkins
- man_EZB: Making of the Modern World
- man_EZB: MUSE Standard
- man_EZB: Nature Archive
- man_EZB: Oxford University Press (Full, STM, HSS)
- man_EZB: Taylor & Francis
- man_EZB: The Nation Digital Archive
- man_EZB: The New Republic
- man_EZB: Times
- man_EZB: Walter de Gruyter Online-Zeitschriften Archiv
- man_EZB: Walter de Gruyter Online-Zeitschriften Linguistics, Literature and Humanities – LLH
- Ovid Lippincott Williams and Wilkins Total Access Collection 2016
- Oxford Handbooks Online Archaeology
- Palgrave Connect eBooks Political Science Collection 2015
- ProQuest Accounting, Tax & Banking Collection
- ProQuest Advanced Technologies & Aerospace Database
- ProQuest Agricultural & Environmental Science Database
- ProQuest Asian & European Business Collection
- ProQuest Biological Science Database
- ProQuest British Periodicals Collection 3 New Platform
- ProQuest Business Market Research Collection
- ProQuest Business Premium Collection
- ProQuest Central (new)

- ProQuest Continental Europe Database
- ProQuest Country Life Archive
- ProQuest Criminal Justice Database
- ProQuest Criminology Collection
- ProQuest Earth, Atmospheric & Aquatic Science Database
- ProQuest East & South Asia Database
- ProQuest East Europe, Central Europe Database
- ProQuest Education Collection
- ProQuest Entertainment Industry Magazine Archive: Cinema, Film and Television
- ProQuest Entertainment Industry Magazine Archive: Music, Radio and The Stage
- ProQuest Ethnic NewsWatch
- ProQuest FIAF International Index to Film Periodicals Database
- ProQuest Health & Medical Collection
- ProQuest Health Research Premium Collection
- ProQuest India Database
- ProQuest Latin America & Iberian Database
- ProQuest Library & Information Science Collection
- ProQuest Linguistics Collection
- ProQuest Linguistics Database
- ProQuest Materials Science & Engineering Database
- ProQuest Medical Database
- ProQuest Middle East & Africa Database
- ProQuest Music & Performing Arts Collection
- ProQuest Natural Science Collection
- ProQuest Nursing & Allied Health Database

- ProQuest Philosophy Collection
- ProQuest Philosophy Database
- ProQuest Politics Collection (New)
- ProQuest Psychology Database
- ProQuest SciTech Premium Collection
- ProQuest Screen Studies Collection
- ProQuest Social Science Premium Collection
- ProQuest Sociology Collection
- ProQuest Technology Collection (New)
- ProQuest Trench Journals and Unit Magazines of the First World War
- ProQuest Turkey Database
- ProQuest UK and Ireland Database
- Scientific Research Publishing (SCIRP)
- SpringerLink Books Business And Management 2016
- SpringerLink Books Computer Science And Engineering German 2016
- SpringerLink Books Computer Science Without Lecture Notes 2016
- SpringerLink Books Education 2016
- SpringerLink Books Lecture Notes In Computer Science 2016
- SpringerLink Books Professional And Applied Computing 2016
- TAEBDC Abc-Clio eBooks 2014
- TAEBDC DeGruyter eBooks 2014
- TAEBDC Jstor Books 2014
- TAEBDC Sage eBooks 2014
- TAEBDC TAO eBooks 2014
- TAEBDC Taylor & Francis eBooks 2014

- University of California Press Journals
- University of Chicago Press Journals
- University of Chicago Press Journals (Current Content)
- VETnetBASE
- Wiley Online Library 2016 Full Collection
- Wiley Online Library Free 2016
- Wiley Online Library Open Access 2016
- Wiley Online Library: Medicine and Nursing 2016
- Wiley Online Library: SSH 2016
- Wiley Online Library: STM 2016

Note: No new external resources were added for this release.