

May 2016 Release Notes



The Alma May 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.

Make the Most of This Release

Action Items



Idea Exchange: [Customizing the Request Forms for Primo](#) - Request forms that are tailored for your end users' needs and exactly match the service options you suggest to your end users are definitely something that you will want to easily implement. The new Primo request form customization options allow you to do just that.

[Requesting Copyright Agreement for Digitization Requests](#) - If your library, like so many other libraries, is required to make sure your patrons are aware of copyright restrictions when placing requests, you can now turn on the option to mandate a copyright declaration signature on the digitization request forms.

Action Items

[Group Items or Loans by Library in User Notifications](#) - Notifications are now made clearer for patrons, with library separations implemented in the default notification templates. If you've customized your notifications, you can use the Alma default as an example for modifying your templates accordingly in order to achieve this goal.

[Integration with UK Copyright Licensing Agency \(CLA\)](#) - If you are using the UK Copyright Licensing Agency's Higher Education license, you can now verify your reading list citations' compliance with the license terms in an integrated manner, by turning on this new integration option.


What's New?

The following sections present the new and changed features in this release of Alma.

Acquisitions

- [PO Line Dates and Related Invoice Lines Displayed When Adding an Invoice Line](#) - When viewing or adding invoice lines, you can now see the **To** and **From** dates of the attached continuous PO line and up to five other invoice lines attached to the PO line. This information is helpful for seeing if you already received an invoice for the latest coverage period.

Resource Management


- [Electronic Collection Bibliographic Records and URLs Added to the Community Zone](#) - Electronic collection level descriptive records (bibliographic records) describing the collections and electronic collection level URLs are being added to the Community Zone. As part of this development, URL override options are available for activated electronic collections.
- [Duplicate Title Analysis](#) - You can now generate a report that identifies duplicate bibliographic records in your catalog.
 Watch the [Duplicate Title Analysis](#) video
- [Authority Control Task List Enhancements](#) - The Authority Control Task List now includes the capability to edit records from the list, and you can use the **Expand** feature in the MD Editor to display additional authority headings details.
- [Additional Resource Management Enhancements](#)

Digital Resource Management

- [New Global Changes Job for Digital Representations](#) - A New Update Information job is now available to implement global changes to the representations in a set of digital titles.
- [Enhanced Support for SRU/SRW Protocol](#) - Additional schemas (for example, Dublin Core) are now supported for the SRU/SRW protocol.
- Streamlined [Digitization Workflow](#) - There is now a single workflow when processing a digitization request, regardless of whether the representation is remote.
- [Additional Digital Resource Management Enhancements](#)

Fulfillment



- **Idea Exchange:** [Customizing the Request Forms for Primo](#) - Non-mandatory fields may now be hidden from the patron's view for hold, booking, and digitization request forms in Primo.
 - [Group Items or Loans by Library in User Notifications](#) - The Borrowing Activity report, overdue/lost items notification, loan receipts, and return receipts have been restructured to group notices by library.
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-  **Idea Exchange:** [Keyboard Shortcuts for Patron Services](#) - Returns, Pick from Shelf, Manage Patron Services, and Scan In Items may now be invoked from keyboard shortcuts.
 - [Requesting Copyright Agreement for Digitization Requests](#) - It is now possible to require a patron to indicate that he or she has read a copyright agreement before submitting a Primo digitization request form.
 - [Copyright Approval Enhancements](#) - There are additional fields for managing copyright clearance and enhancements to the Approval Requests List.
 - [Integration with UK Copyright Licensing Agency \(CLA\)](#) - Alma can now retrieve real-time copyright licensing information for UK customers.
 - [Viewing Electronic Resources for a Citation](#) - You can now see more information about linked electronic resources on the Edit Reading List page.
 - [Additional Fulfillment Enhancements](#)

Resource Sharing

- [Lookup Agency for NCIP Partners](#) - Alma now supports the option to call the NCIP Lookup Agency function while configuring the partner. This is applicable only for NCIP peer-to-peer partners.
- [Create a Resource Sharing Request from Search](#) - It is now possible to place a resource sharing request from the repository search result, allowing creation of requests without accessing the task lists.



Watch the [Create Resource Sharing Request from Search](#) video

- [Additional Resource Sharing Enhancements](#)

Collaborative Networks

- [Held By Indication for Electronic Collections](#) - Title searches in the Network Zone will now include the **Held By** indication for electronic collections available to members.
- [Distinguishing Between Network Level Local Authority Records and Institution Level Local Authority Records](#) - Improvements have been made in the MD Editor to distinguish between local authority records at the Institution and Network levels.
- [Browsing Bibliographic Headings in the Network](#) - Member institutions in a collaborative network environment can now browse the headings of the shared catalog managed in the Network Zone .
- [Enhancements to the Aleph Central Catalog Integration](#) - Enhancements have been made to the integration of Alma institutions with the Aleph Central Catalog—for example, the ability to indicate the merge routine to be used by Aleph when merging changes from a member institution into the Central Catalog.

Analytics

- [Source Type Added to Link Resolver Usage](#) - The **Source Type** field has been added to the OpenURL Context Details dimension of the Link Resolver Usage subject area.

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 in a future release. Only export to an xlsx format will be supported and not export to an xls format.

Alma Infrastructure

- You can generate a tracking ID that assists Ex Libris in debugging, by clicking the new **Generate Tracking ID** link from the Persistent Menu (**Help > Generate Tracking ID**). Use this option when an error occurs and the standard error message with a tracking ID does not appear automatically. Generate the ID as soon as possible after the error occurs. This ID enables Ex Libris to provide better initial analysis of the issues that you are encountering and helps identify inconsistent problems. Provide this ID in any Salesforce issue that you open. The following is an example of a tracking ID:

Please use this unique tracking ID when reporting an issue:
E08-0604133528-TE8IH-GENERAL

Generate Tracking ID



Watch the [Tracking ID Generator](#) video

- In certain cases, an institution may have multiple SSO systems using the SAML protocol. In such cases, you can now configure multiple active SAML profiles in one institution. The Alma URL must contain the `/SAML/idpCode/[profile code]` suffix for Alma to use the correct SAML integration profile. To configure this feature, change the `enable_multiple_active_saml_idp` parameter (**Administration > General Configuration > Configuration Menu > General Configuration > Other Settings**) to `true`. For more information, see [SAML-Based Single Sign-On/Sign-Off](#).

Alma APIs



- **Idea Exchange:** A new API was created to retrieve a job's status as well as the job's report, including detailed information such as successful records and failed records:

```
GET /jobs/  
GET /jobs/{job id}  
GET /jobs/{job id}/runs  
GET /jobs/{job id}/runs/{run_id}
```

- The **Expand** parameter was added to the Get User Loans API. For details, see <https://developers.exlibrisgroup.com/alma/apis/users>.

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.
- When creating an Analytics report using the **Cost per Use** field, the year used is taken from the date of the invoice transaction instead of the fiscal year of the fund used in the transaction.

Data Services

- More than 3800 Alma Community Zone records are now enriched with MARC records from OECD iLibrary.
- [Library of Congress Authorities Community Zone Updates](#)
- [New Electronic Collections Added to the Alma CKB](#)
- No new external search resources for added for this release.



Acquisitions - May 2016 Enhancements

PO Line Dates and Related Invoice Lines Displayed when Adding an Invoice Line

When viewing or adding invoice lines attached to continuous PO lines, you can now see:

- The To and From subscription dates of the associated PO line
- The last (up to five) invoice lines associated with this PO line.

This information is helpful for seeing if you already received an invoice for the latest coverage period.

Add Invoice Line

Type

Line Number 1

PO line

[More Information](#)

Title AAA Journals - American Academy Advertising Journals Pack
(Journal of interactive advertising & Journal of current issues and research in advertising)

PO line price 101.00 USD

Check
subscription date
overlap

Additional
Information

Accrual Mode

PO Line -
Subscription from
date

PO Line -
Subscription to
date

Subscription from *

Subscription to date *

Columns

Invoice / Invoice line number	Invoice Status	From Date	To Date	Additional Information
1 0579054 (263)	INREVIEW	01/01/2016	12/31/2016	-
2 0578353 (1)	READY	01/01/2015	12/31/2015	-

No records were found.

Price USD

Release remaining
encumbrance

Total Price 101.00 USD

Quantity

VAT Note -

Reporting Code

Note

Invoice amount 100.00 USD

Total invoice lines amount 0.00 USD

Quick Add

Fund

Percent Amount

USD

Add Fund

Adding Invoice Line for Continuous PO Line

Invoice Line Details
Cancel

Invoice Number 12345
Line number 1
Vendor EBSCO

Type Regular
Line Number 1

PO line POL-207730
More Information

Title AAA Journals - American Academy Advertising Journals Pack (Journal of interactive advertising & Journal of current issues and research in advertising)

PO line price 101.00 USD

Check subscription date overlap Yes

Additional Information -

Accrual Mode No

PO Line Subscription from date - PO Line Subscription to date -

Subscription from date 01/01/2017 Subscription to date 12/31/2017

Invoice / Invoice line number	Invoice Status	From Date	To Date	Additional Information
1 12345 (1)	READY	01/01/2017	12/31/2017	-
2 0579054 (263)	INREVIEW	01/01/2016	12/31/2016	-
3 0578353 (1)	READY	01/01/2015	12/31/2015	-

Price 101.00 USD Release remaining encumbrance No

Total Price 101.00 USD

Quantity 1 VAT Note -

Reporting Code Internet Electronic Access

Note 2017

Invoice amount 100.00 USD Total invoice lines amount -

Funding
Columns

#	Fund Name	Percent	Amount	
1 1	Internet Journals - JBC (FY-2016) (-18,778.57 USD)	100.0%	101.00 USD	Delete
2 Total	-	100.0%	101.00 USD	

Viewing Invoice Line for Continuous PO Line

In addition, if the invoice line has a note, the note (or part of the note and a tooltip) appears in the invoice line list when viewing the PO line or the invoice.

Invoice Number	Line #	Type	Invoice Date	Subscript from date	Subscript to date	Additional Information	Invoice Status	Price	Total Price	VAT Note	Funds	Note	
1 12345	1	Regular	04/07/2...	01/01/2...	12/31/...	-	InReview	101.00 USD	101.00 USD	-	Internet Journal ...	2017	View
2 0579054	263	Regular	12/16/2...	01/01/2...	12/31/...	-	Closed	240.00 USD	240.00 USD	-	Internet Journal ...	Free Text: Renewal ...	View
3 0578353	1	Regular	05/06/2...	01/01/2...	12/31/...	-	Closed	113.00 USD	113.00 USD	-	Internet Journal ...	Free Text: New subsc...	View

Invoice Line List

For more information, see the marked areas in [Creating an Invoice From a PO or Manually](#).

Resource Management - May 2016 Enhancements

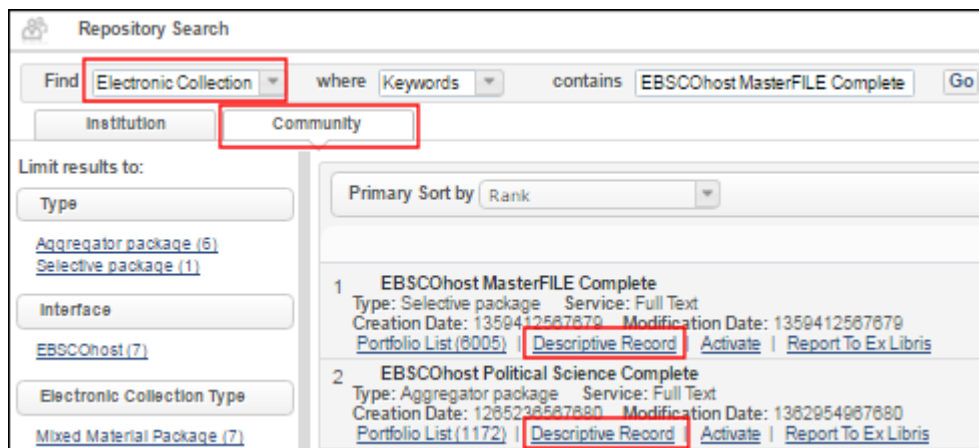
Electronic Collection Bibliographic Records and URLs Added to the Community Zone

As described in the **Community Zone Electronic Collections Enhanced with Collection-Level Bibliographic Record Content** section of the [Alma February 2016 Release Notes](#), bibliographic records (descriptive records) for electronic collections are being added to the Community Zone. In addition, URLs are being added to the electronic collections in the Community Zone with the option to specify a local override.

The addition of bibliographic records and URLs to the electronic collections provides an option to expose and provide access to electronic collections to patrons via the discovery system.

The bibliographic records and URLs will be updated in the Community Zone as part of the CKB update process.

These new electronic collection bibliographic records can be accessed by completing an Electronic Collection search from the Community tab in Alma's Repository Search and clicking the **Descriptive Record** link to open the electronic collection's bibliographic record.



The screenshot shows the 'Repository Search' interface. The search criteria are: Find **Electronic Collection** where **Keywords** contains **EBSCOhost MasterFILE Complete**. The search is performed in the **Community** zone. The results are sorted by Rank. Two results are shown:

- 1 EBSCOhost MasterFILE Complete
Type: Selective package Service: Full Text
Creation Date: 1359412587879 Modification Date: 1359412587879
[Portfolio List \(8005\)](#) | [Descriptive Record](#) | [Activate](#) | [Report To Ex Libris](#)
- 2 EBSCOhost Political Science Complete
Type: Aggregator package Service: Full Text
Creation Date: 1285226587880 Modification Date: 1362954987680
[Portfolio List \(1172\)](#) | [Descriptive Record](#) | [Activate](#) | [Report To Ex Libris](#)

Descriptive Record Link in the Community Zone Electronic Collection Search Results

See [Repository Search Results Actions](#) for more information.

From the MARC Record Simple View, you can copy the bibliographic record or link to it.

MARC Record Simple View Back Copy Link

Title Complete Guide to Building Affordable Earth-Sheltered Homes: Everything You Need to Know Explained Simply
 MMS ID 99341000000004169
 Originating system CKB Originating system ID (CKB)341000000004169 Originating System Version -
 Suppress from publishing No Export to WorldCat Don't publish Brief record No
 Brief level - Record Format marc21

Tools

LDR ----nam-a22----z--4500
 008 130809uuuuuuuuuuuuu-|----u|----|eng-d
 245 00 |a Complete Guide to Building Affordable Earth-Sheltered Homes: Everything You Need to Know Explained Simply
 246 __ |a Complete Guide to Building Affordable Earth-Sheltered Homes
 020 __ |a 1-80138-373-8
 035 __ |a (CKB)341000000004169
 906 __ |a BOOK

Electronic Collection Bibliographic Record from the Community Zone

In a Network environment, there is the additional **Copy to Network** option (see below).

MARC Record Simple View Back Copy to network Copy Link

Title Philosophy for A2: Unit 3
 MMS ID 992670000000325117
 Originating system CKB Originating system ID (CKB)2670000000325117 Originating System Version -
 Suppress from publishing No Export to WorldCat Don't publish Brief record No
 Brief level - Record Format marc21

Tools

LDR ----cam-a22----z--4500
 008 151109u2013uuuuuuuuu-|----u|----|eng-d
 020 __ |e 0-203-71764-3
 020 __ |e 1-283-98974-2
 020 __ |e 1-135-86784-4
 020 __ |a 1-138-12763-9
 020 __ |a 0-415-45822-6
 035 __ |a (CKB)2670000000325117
 245 00 |a Philosophy for A2: Unit 3
 246 __ |a bkey=9780203717648
 246 __ |a Philosophy for A2
 260 __ |a Hoboken |b Taylor and Francis
 906 __ |a BOOK

Electronic Collection Bibliographic Record from the Community Zone in a Network Environment

When you activate an electronic collection from the Community Zone (see [Activating an Electronic Collection Using the Activation Wizard](#) for more information), the URL stored in the Community Zone for the electronic collection displays in the Electronic Collection Information section on the Activation Wizard page. To override this URL, enter a new URL in the **Electronic Collection Level URL** parameter.

Activation Wizard: Electronic Collection and Services Setup 1 Cancel Next

Electronic Collection Information

Electronic Collection name EBSCOhost MasterFILE Complete
 Type Selective package Number of portfolios 6005
 Electronic Collection Level URL <https://www.ebscohost.com/public/masterfile-complete>
 Additional descriptive information -

Local Electronic Collection Information

Public name
 Library

Electronic Collection Level URL
 Additional descriptive information EBSCOhost Mark Bib as suppressed
 Electronic Collection Proxy No Yes: Electronic Collection Proxy Selected

Full Text Service

Activate this electronic collection service Make service available
 Active From Date Active Until Date
 Automatically activate new portfolios
 Service public name
 Service Public Note
 Service Authentication Note

Override the URL as Part of the Activation Process

As part of the activation process, you can also select a new bibliographic record for the **Additional descriptive information** parameter, and the **Mark Bib as suppressed** is selected as the default. If you choose not to mark the bibliographic record as suppressed, the bibliographic record is published to the discovery system and access to the electronic collection will be available through the Alma Link Resolver by directing the user to the electronic collection level URL.

Complete the remaining activation parameters as you normally would, and click **Activate**. The Electronic Service Editor page appears with a confirmation message of successful activation. Click **Save** to complete the process.

Electronic Service Editor Page After Electronic Collection Activation

If you need to override an electronic collection URL for an electronic collection that you have activated, you can do that using the Electronic Collection Editor and specifying a new URL for the **Electronic Collection Level URL (override)** parameter.

Availability	Service Type	Number of Portfolios	Active Portfolios	Active From Date	Active Until Date	Action
1	Full Text	0	0	-	-	Action

Electronic Collection Level URL Parameters in the Electronic Collection Editor

The **Electronic Collection Level URL** parameter displays the URL from:

- The URL identified in the Community Zone for the (activated) electronic collection
- The URL identified for a completely local electronic collection (not activated from the Community Zone)

The **Electronic Collection Level URL (override)** parameter may contain the override to the URL stored in the Community Zone or the URL created for a completely local electronic collection.

For a local electronic collection, you can create and edit both the **Electronic Collection Level URL** parameter and the **Electronic Collection Level URL (override)** parameter in the Electronic Collection Editor.

The screenshot shows the 'Electronic Collection Editor' interface. At the top, the 'Electronic Collection name' is 'OC Electronic Collection'. Below this are four tabs: 'Electronic Collection Description', 'General Information', 'Additional Information', and 'Notes'. The 'Additional Information' tab is selected and highlighted with a red box. Under this tab, there is a section titled 'Electronic Collection Information'. Within this section, the 'Electronic Collection Level URL' field is highlighted with a red box and contains the text 'http://www.amazon.com'. Below it, the 'Electronic Collection Level URL (override)' field is also highlighted with a red box and is currently empty. Other fields in the section include 'Source', 'Creator', and 'Alternative Title'. Below the 'Electronic Collection Information' section, there are radio buttons for 'Electronic Collection is free?' (Not Free, Free), 'Electronic Collection Proxy Enable' (No, Yes), a 'Language' dropdown menu, and an 'Additional descriptive information' field. At the bottom, there is a section for 'Available Services' with a 'Number of portfolios' set to 0.

Electronic Collection Level URL Parameter for a Local Electronic Collection

NOTE: During May 2016, the Community Zone will be updated with the electronic collection bibliographic record and URL content. For instances where you previously entered an **Electronic Collection Level URL** parameter for an electronic collection activated from the Community Zone, this parameter will be placed in the **Electronic Collection Level URL (override)** parameter as part of the migration to this new capability. Indexing of the **Electronic Collection Level URL** for advanced search access will be completed as part of the July full re-indexing process.

Duplicate Title Analysis

Duplicate Title Analysis enables the generation of a report that identifies duplicate bibliographic records in your catalog. Duplicates are determined by looking for a match on one of the following parameters:

- System Control Number (035 field) with or without a prefix such as (oclc)
- ISBN

- ISSN
- Other Standard Identifier (024 field)

Duplicate Title Analysis

After submitting a job, using Duplicate Title Analysis ([Resource Management > Advanced Tools](#)), the job results can be viewed from the History tab on the Monitor Jobs page ([Administration > Manage Jobs > Monitor Jobs](#)). The History tab can also be accessed from the **Job History** link on the Duplicate Title Analysis page.

Name	Job ID	Status
Duplicate Title Analysis - 08/04/2016 16:52:08 PM IDT	140163280000301	Completed Successfully
Authorities - Link BIB Headings	140160720000301	Completed Successfully

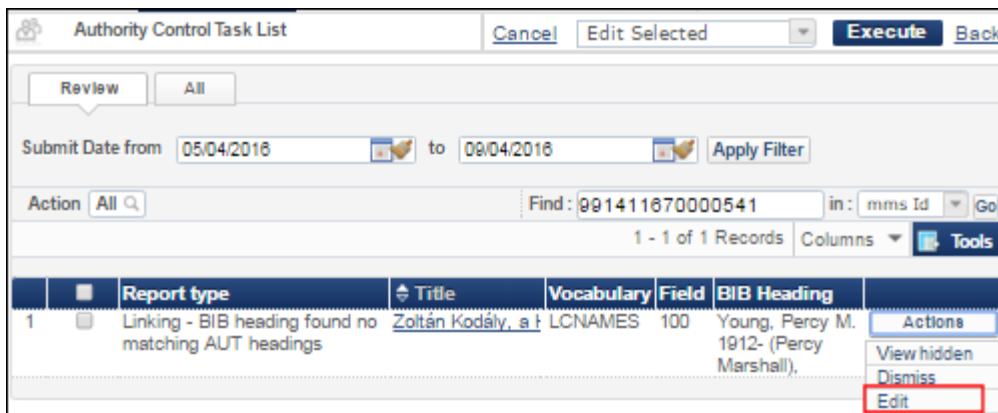
Duplicate Title Analysis Job

For detailed information, see [Using Duplicate Title Analysis](#).

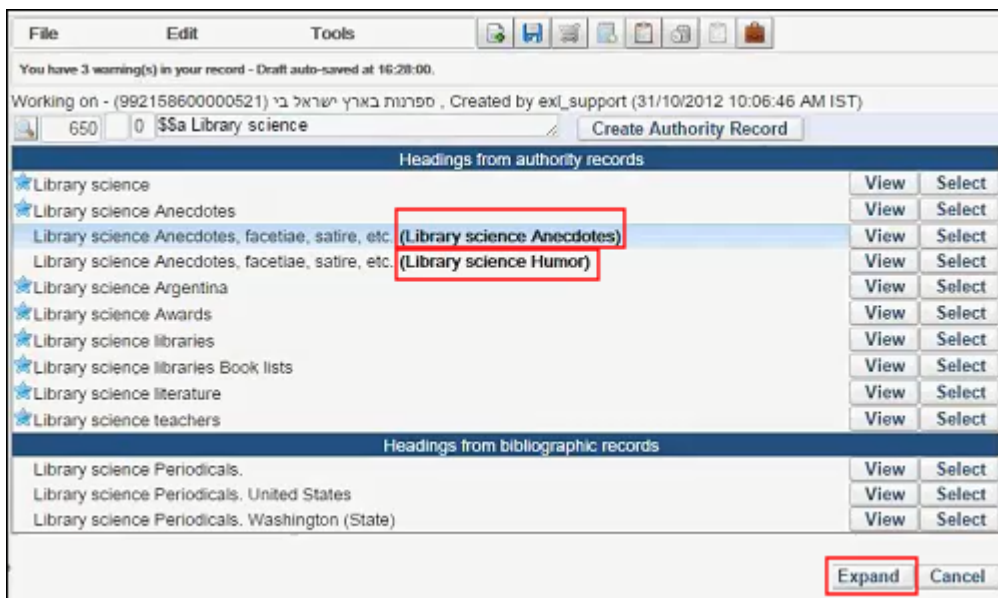
NOTE: In a future release, additional capabilities will be provided for handling duplicate bibliographic records in batch mode.

Authority Control Task List Enhancements

The Authority Control Task List has been enhanced to include the capability to edit records from the list; and while editing these records in the MD Editor and viewing preferred/nonpreferred terms, you can use the **Expand** feature to display additional details.



Authority Control Task List Edit Option



Authority Control Task List MD Editor Expand Option

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

Additional Resource Management Enhancements

- Editing bibliographic records can be accomplished from within the Browse Bibliographic Headings function. When you click **View** in the Bibliographic Record Headings browse list, the split screen that opens with one or more bibliographic record provides the option to also edit bibliographic records. See [Browsing Bibliographic Headings](#) for more information.

The screenshot shows a software interface for managing bibliographic records. At the top, there is a menu bar with 'File', 'Edit', and 'Tools'. Below the menu bar, there are search filters: 'Heading' (set to 'N'), 'Family' (set to 'M'), 'Source' (set to 'M'), 'Perso' (set to 'C'), and 'Search Value' (set to 'clemens'). A 'Go' button is next to the search filters. The main area is divided into two panels. The left panel, titled 'Bibliographic Records Headings', lists 17 records with columns for 'Type' and 'View'. The 17th record, 'Clemens, Samuel Langhorne, 1835-1910', is highlighted in yellow. The right panel, titled 'Bibliographic Records(17)', shows details for the first three records. Each record entry includes a title, a link to the record, the author, publication information, subjects, and other system numbers. The 'View' and 'Edit' buttons for each record are visible, with the 'Edit' button for the first record highlighted in red.

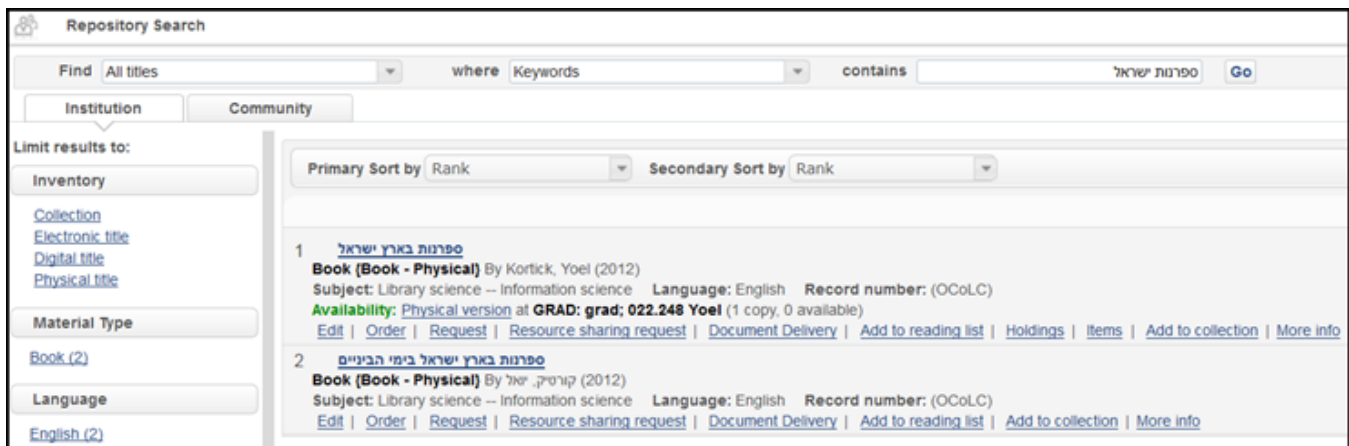
Edit Bibliographic Records from the Browse Bibliographic Record Headings List

- Additional confirmation dialog boxes and error messages were added, and some error messages were enhanced, in response to clicking **Done** while managing electronic resource activation. For the complete list of messages, see the tables in **To mark a resources as done** in [Managing Electronic Resource Activation](#).
- There is a new way of dealing with the period in normalization rules, which will greatly increase the possibilities for correcting data. Until now, it was not possible to deal with the period (replace it or use it as part of text to add). Now it is possible to specify the period by preceding it with four backslashes. For example, the rule below will remove the period (replace it with nothing) in 245 subfield a:

```
rule "remove period in 245 subfield a (replace it with nothing) period is
specified by preceding it with four backslashes"
when
(TRUE)
then
replaceContents "245.a.\\\\" with ""
end
```

- When a contact email is present in a rule contributed to the Community Zone, the email is now a link that creates an email to the specified email address.

- The permissions for the **Add/Remove Extensions** buttons in **Resource Management > Resource Configuration > Configuration Menu > Metadata Management**, for any MARC profile, were changed from Cataloger Extended to Catalog Administrator.
- A new privilege, LOCALIZE_SELECTED_PORTFOLIOS, was added to the following roles by default: Catalog Administrator, Catalog Manager, Cataloger, Cataloger Extended, Collection Inventory Operator, Collection Inventory Operator Extended, Digital Inventory Operator, Digital Inventory Operator Extended, Electronic Inventory Operator, Electronic Inventory Operator Extended, Physical Inventory Operator, Physical Inventory Operator Extended, Purchasing Manager, Purchasing Operator, Receiving Operator, Receiving Operator Limited, Repository Administrator, Repository Manager, Selector, Trial Manager, Trial Operator. This privilege enables users with these roles to localize portfolios. If you do not want any of these roles to have this privilege, contact Ex Libris Support to disable the privilege.
- A new privilege, DELETE_BIB, was added to the following roles by default: Catalog Administrator, Catalog Manager, Cataloger, Cataloger Extended, Collection Inventory Operator, Collection Inventory Operator Extended, Digital Inventory Operator, Digital Inventory Operator Extended, Electronic Inventory Operator, Electronic Inventory Operator Extended, Physical Inventory Operator, Physical Inventory Operator Extended, Purchasing Manager, Purchasing Operator, Receiving Operator, Receiving Operator Limited, Repository Administrator, Repository Manager, Trial Manager, Trial Operator. This privilege enables users with these roles to delete a bibliographic record if they are deleting the last item associated with the record.
- Information about specific errors was added to the Publishing to OCLC - Bibliographic Records report page.
- Hebrew language support is now available in the repository search and MARC Record Simple View.



Hebrew Text in Repository Search

MARC Record Simple View			
Title	ספרות בארץ ישראל		
MMS ID	992164130000521		
Originating system	TRAINING_1_INST	Originating system ID	992164130000521
		Originating System - Version	
Suppress from publishing	No	Export to WorldCat	Don't publish
Export to Libraries	No	Record Format	marc21
Australia		Brief record	No
<hr/>			
LDR	00433nam a2200133 u 4500		
001	992164130000521		
005	20121029125842.0		
008	121029s2012 xx r 000 0 eng d		
035	__ a (OCoLC)		
082	__ a 022.248 Yoel		
100	1_ a Kortick, Yoel d 1971-		
245	1_ a ספרות בארץ ישראל		
650	_0 a Library science		
650	_0 a Information science		

Hebrew Text in MARC Record Simple View



Digital Resource Management - May 2016 Enhancements


New Global Changes Job for Digital Representations

A new job, **Global Representation Changes**, is now available to apply global changes to the representations in a set of digital titles.

To access this job:

1. On the **Run a Job - Select Job to Run** page (**Administration > Manage Jobs > Run a Job**), select **Global Representation Changes** and click **Next**.
2. Select a set of digital titles on which to run the job and click **Next**.

The following appears:

 Run a Job - Enter Task Parameters

i The selected set contains 5 members.

Global Representation Changes Task Parameters

Apply only for

Remote

Repository Name

Usage Type

Library

Entity Type

Access Rights Policy

Change Fields

Usage Type

Library

Label Condition

Public Note Condition

Entity Type

Access Rights Policy

Linking Parameter 1

Linking Parameter 2

Linking Parameter 3

Linking Parameter 4

Linking Parameter 5

Add Note

[Back](#) [Cancel](#) **Next**

Run a Job - Enter Task Parameters

3. In the **Apply Only For** section, indicate the criteria to determine the representations for which you want the changes to apply. This will allow you to filter out representations you do not need to update.
4. In the **Change Fields** section, select the parameters to indicate the changes that you want to be made to the representations. For more information about the fields of this page, see [Adding a Representation](#).

5. Click **Next** and perform the rest of the steps for running a job as described in [Running Manual Jobs on Defined Sets](#).

NOTE:

- All of the **Apply only for** parameters must match for a representation to be handled.
 - The **Condition** drop-down list is available for the **Label** and **Public Note** fields. If a condition does not apply, only that specific field change is ignored, but the rest of the fields are changed.
 - You can delete public notes by selecting the **Public Note** field and leaving it empty.
-

Enhanced Support for SRU/SRW Protocol

The following enhancements have been implemented for SRU/SRW support:

- Dublin Core format and all MARC schemas (including UNIMARC and CNMARC) are now supported for SRU/SRW. The following crosswalks are supported:
 - From DC and MARCXML to every other format (DC, MARCXML, CNMARCXML, KORMARCXML, and UNIMARCXML)
 - From every format (DC, MARCXML, CNMARCXML, KORMARCXML, and UNIMARCXML) to DC and MARCXML.

Crosswalks between CNMARCXML, KORMARCXML, and UNIMARCXML are not supported.

For more information, see the [Developers Network](#).
- For Dublin Core records with representations, the **DC identifier** field is added with a URL for each representation.

For more information on the SRU/SRW protocol, see [SRU/SRW Search](#).

Streamlined Digitization Workflow

There is now a single workflow when processing a digitization request, regardless of whether the representation is remote. Additionally, information from the digitization request is now transferred automatically to the Representation Details page to simplify creating the representation - for example, when digitizing a book chapter, the request details such as from/to pages are automatically transferred into the digital representation's details, for enhanced delivery and management use. For detailed information, see [Adding a Digitization Profile Rule](#).

Additional Digital Resource Management Enhancements

- The patron-facing Alma Digital Viewer now supports multiple languages. For more information on the Alma Digital Viewer, see [Viewing Digital Representations](#).
- A new privilege, VIEW_MANAGE_COLLECTION, was added to the following roles: Collection Inventory Operator, Collection Inventory Operator Extended, Digital Inventory Operator, Digital Inventory Operator Extended. This privilege enables users with these roles to view collections without being able to edit them. The existing privilege, COLLECTION_INVENTORY_MANAGE, was added to the Digital Operator in addition to the Collection Operator. This privilege enables editing a collection.
- Every collection-related operation is available only for users with a relevant role in the library of the collection.
- In publishing to Primo, the public note was added to the AVD on subfield f.

Fulfillment - May 2016 Enhancements

Customizing the Request Forms for Primo

For Primo, on the hold, booking, and digitization request forms, non-mandatory fields may now be hidden from the patron's view. A new mapping table has been created for each of the request forms to define which fields are visible.

For detailed information about configuring the mapping tables, see [Customizing Primo Request Forms](#).

Group Items or Loans by Library in User Notifications

Patron notifications that include lists of items from multiple libraries were restructured to delineate each library to make it easy for a patron to determine the libraries with which he or she has liabilities.

The affected notifications are:

- Borrowing Activity report
- Overdue/lost items notification
- Loan receipts
- Return receipts

The following are some example reports:

UTD

Borrowing Activity Letter

03/22/2016

Implementer, Ex Libris

UTD
McDermott Library MC33
800 West Campbell Road
Richardson
75080-3021
USA

Dear Ex Libris

We would like to remind you that you have the following items on loan:

Overdue Loans

.Eugene McDermott Library					
Title	Description	Author	Due Date	Fine	Library
The go-between			12/02/2013		.Eugene McDermott Library

Loans

.Eugene McDermott Library				
Title	Due Date	Fine	Description	
The go-between	12/02/2013			
Representing sport / Rod Brookes.	05/09/2016			

Ackerman Center				
Title	Due Date	Fine	Description	
Jews and the Olympic Games : the clash between spcs : with a complete review of Jewish Olympic medallists	04/12/2016			

Sincerely
Access and Delivery Services

UTD

[Contact Us](#)

[Pay Library fines online:](#)

Borrowing Activity Report

UTD

Loan Receipt Letter

03/22/2016

Implementer, Ex Libris

.Eugene McDermott Library
800 West Campbell Road
UTD
Richardson
75080-3021
USA

Dear Ex Libris

The following items have been loaned from the library at the .Eugene McDermott Library, Main Circulation Desk

Loans:

.Eugene McDermott Library						
Title	Author	Loan date	Due date	Library	Description	
Representing sport / Rod Brookes.	Brookes, Rod.	03/22/2016	05/09/2016 23:59:00 CDT	.Eugene McDermott Library		

Ackerman Center						
Title	Author	Loan date	Due date	Library	Description	
Jews and the Olympic Games : the clash between sport and politics : with a complete review of Jewish Olympic medallists	Taylor, Paul	03/22/2016	04/12/2016 18:00:00 CDT	Ackerman Center		

Sincerely
Access and Delivery Services

.Eugene McDermott Library

Loan Receipts

UTD

Return Receipt Letter

03/22/2016

Implementer, Ex Libris

.Eugene McDermott Library
800 West Campbell Road
UTD
Richardson
75080-3021
USA

Dear Ex Libris

The following loans were returned to the library at the .Eugene McDermott Library, Main Circulation Desk

Loans:

.Eugene McDermott Library						
Title	Description	Author	Due date	Return date	Fine	Library
Representing sport / Rod Brookes.		Brookes, Rod.	05/09/2016 23:59:00 CDT	03/22/2016 02:07:28 CDT		.Eugene McDermott Library

Ackerman Center						
Title	Author	Due date	Return date	Fine	Library	
Jews and the Olympic Games : the clash between sport and politics : with a complete review of Jewish Olympic medallists	Taylor, Paul,	04/12/2016 18:00:00 CDT	03/22/2016 02:07:22 CDT		Ackerman Center	

Sincerely
Access and Delivery Services

.Eugene McDermott Library

Return Receipts

Using XSL to customize the Borrowing Activity report is explained in [Configuring Alma Letters](#). If the XSL was previously customized, it will not be updated to include the details by library. Restore the XSL to the default in order to take advantage of this enhancement.

Keyboard Shortcuts for Patron Services

Keyboard shortcuts were assigned to the following commonly used tasks:

- Alt+R - Returns
- Alt+P - Pick from Shelf
- Alt+W - Manage Patron Services
- Ctrl+Alt+S - Scan In Items

NOTE: You must be at a circulation location for the above shortcuts to work.

To view a more complete list, see [Alma Global Hotkeys](#).

Requiring Copyright Agreements for Digitization Requests

It is now possible to require that a patron indicate that he or she has read a copyright agreement before submitting a Primo digitization request form.

The Copyrights table was renamed [Copyright Declaration](#) and contains a new file to configure - DigitizationRequestCopyrightDeclaration.html - which is the Digitization Request Copyrights Declaration that appears above the check box in the Primo Get It form. The patron can click **Request** only after selecting the check box indicating agreement.

In Alma, the check box **Copyright Declaration Signed by Patron** appears on the patron digitization request form. See [Creating a Request](#).

The Approval Requests List indicates whether the copyright declaration was signed. See [Approving/Rejecting Requests for Digitization](#).

The checkbox in Primo, as seen below, only appears once the Digitization Request Copyrights Declaration has been customized.

Copyrights:

Copyrights:

Law of the United States (Title 17, U.S. Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the photocopy or other reproduction is not to be "used for any purpose

* I have read the above statement and agree to abide by its restrictions

Primo Get It Digitization Request Form

Approval Requests List

Approval Requests List

Status: Active

Find: _____ in: Title Go

1 - 1 of 1 Records Columns Tools

Title	Course	Creation date	Expiration Date	Requester	Digitization Type	Request Notes	Status	Warning	Copyright Declaration	Actions
1 0710131356Delivery	-	-	11/10/2013	Tester, Automatic	Partial	Request note:Cha... 3 - 4.	Waiting for CC	Title is waiting for Copyright Clearance.	Copyright Declaration Not Signed by Patron	Actions

Approval Request List

Copyright Approval Enhancements

- Additional fields for managing copyright clearance were added to the staff digitization request when creating a request on a physical resource or adding a reading list citation. For a description of the new fields, see [Creating a Request](#).
- When a request requires approval (as indicated by a digitization profile rule, or if the fields were entered when adding a reading list citation), a copyright clearance approval task is created and is available to manage on the newly reorganized Approval Requests List (see the previous feature and [Approving/Rejecting Requests for Digitization](#)). The reorganized page includes a new filter, **Activity Status**.
- When adding or editing a citation, you can choose to save your changes and then immediately view the Approvals Requests List using the new **Save and Manage Approval** button. For more information, see [Adding Citations to a Reading List](#).
- The digitization profile rules now include a new value, **Course Related Digitization**, when you select **Request Type** as an input parameter. This value can be used to create a rule that creates an Approval task when a

reading list citation is submitted. For information on digitization profile rules, see [Configuring Digitization Profiles Rules](#).

- Two new statuses were added to the Citations Copyright Default Status table (see [Configuring the Default Copyright Status of Reading List Citations](#)):
 - **Waiting for Approval** - Assigned automatically to a citation when there is a new copyright clearance approval task for it.
 - **Waiting for CC** - Assigned manually to indicate that a librarian is working on the copyright clearance task.

Integration with UK Copyright Licensing Agency (CLA)

Alma can now retrieve real-time copyright licensing information for UK customers. When enabled:

- To view CLA copyright information about a reading list citation, click **Check CLA Permissions** on the Edit Reading List page. For more information, see the marked area in [Managing Citations](#).
- To enter CLA-specific information about a source in a digitization request, select an option in the **Source** field. For more information, see the marked area in [Creating a Request](#).

To enable CLA, set `display_CLA_info_in_alma` to `true`; see [Configuring Other Settings](#).

Viewing Electronic Resources for a Citation

You can now see more information about linked electronic resources on the Edit Reading List page (for more information, see marked areas of [Managing Citations](#)):

- To view the original source (the URL) of a citation added using Leganto Cite It, click **View Source**. This link appears for citations that have a non-empty **Source** field.
- To view the OpenURL link resolver results for an article, click **View It**. This link will appear if the system can resolve the citation's metadata to an electronic resource.

Additional Fulfillment Enhancements

- A validation for library code was added to the Primo View To Libraries mapping table to verify that the library code exists.
- The course loader integration profile now includes additional parameters to support overwriting existing information for a course. In addition, support was added for course "rollover": new courses that inherit the

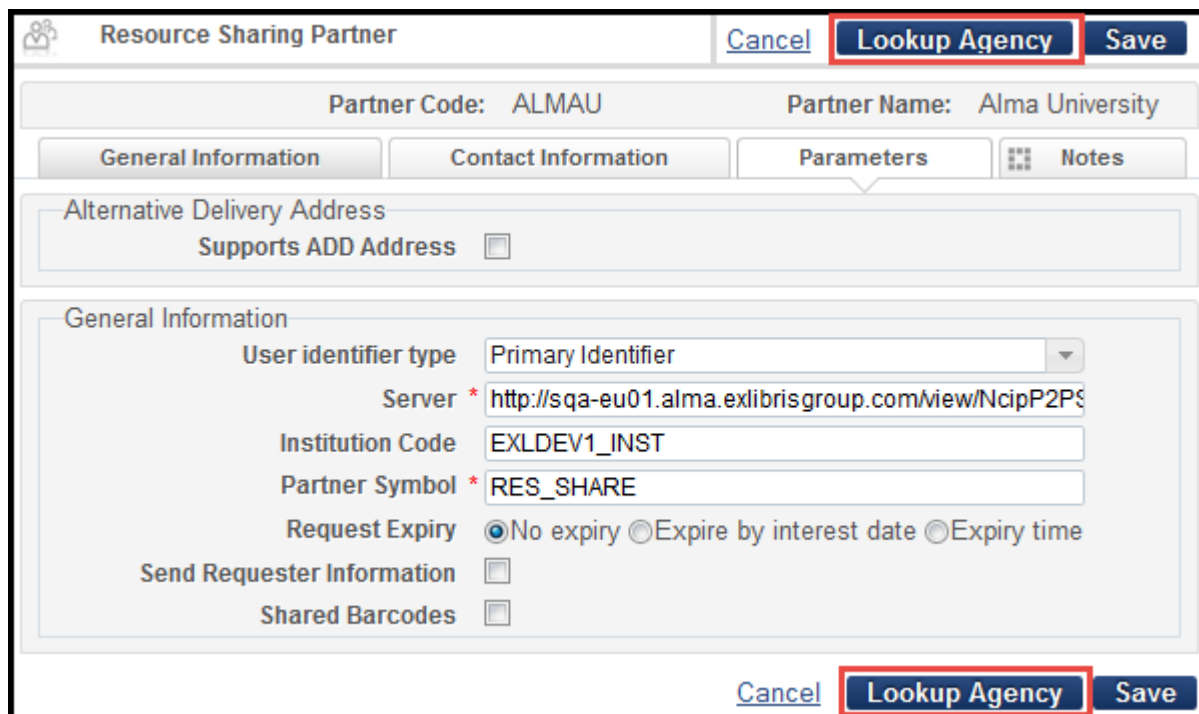
reading lists and other information from old courses. For more on the changes to the course loader integration profile, see the [Leganto May 2016 release notes](#).

- **NotificationUponRenewalLetter** was changed to **NotifyUponRenewalLetter**.
- In the XML output of the Bursar integration profile, the new field **itemInternalLocation** holds the internal location of the fine/fee related item. The **itemLocation** field continues to hold the external location, or the internal location if there is no defined external location.
- A newly created loan's status is **Loan** (this was always true). **Loan** is now an available option in the Overdue and Lost Loan Record Profile. You can now, for example, select **Loan** as **Loan Status** and set **Days After Status Date** to 5 to find all loans that are five days old.
- The delivery address (at home or at work) can now be written in the loan receipt letter when configuring it in the XSL.

Resource Sharing - May 2016 Enhancements

Lookup Agency for NCIP Partners

Alma now supports the option to call the NCIP Lookup Agency function while configuring the partner. This is applicable only for NCIP peer-to-peer partners.



Resource Sharing Partner

Cancel Lookup Agency Save

Partner Code: ALMAU Partner Name: Alma University

General Information Contact Information Parameters Notes

Alternative Delivery Address

Supports ADD Address

General Information

User identifier type Primary Identifier

Server * http://sqa-eu01.alma.exlibrisgroup.com/View/NcipP2P9

Institution Code EXLDEV1_INST

Partner Symbol * RES_SHARE

Request Expiry No expiry Expire by interest date Expiry time

Send Requester Information

Shared Barcodes

Cancel Lookup Agency Save

Resource Sharing Partner Parameters

To view the partner's information, click the new **Lookup Agency** button on the partner parameter page. Clicking this button contacts the partner and returns their supported protocol or other information the partner wishes to transmit to assist in the partner configuration process.

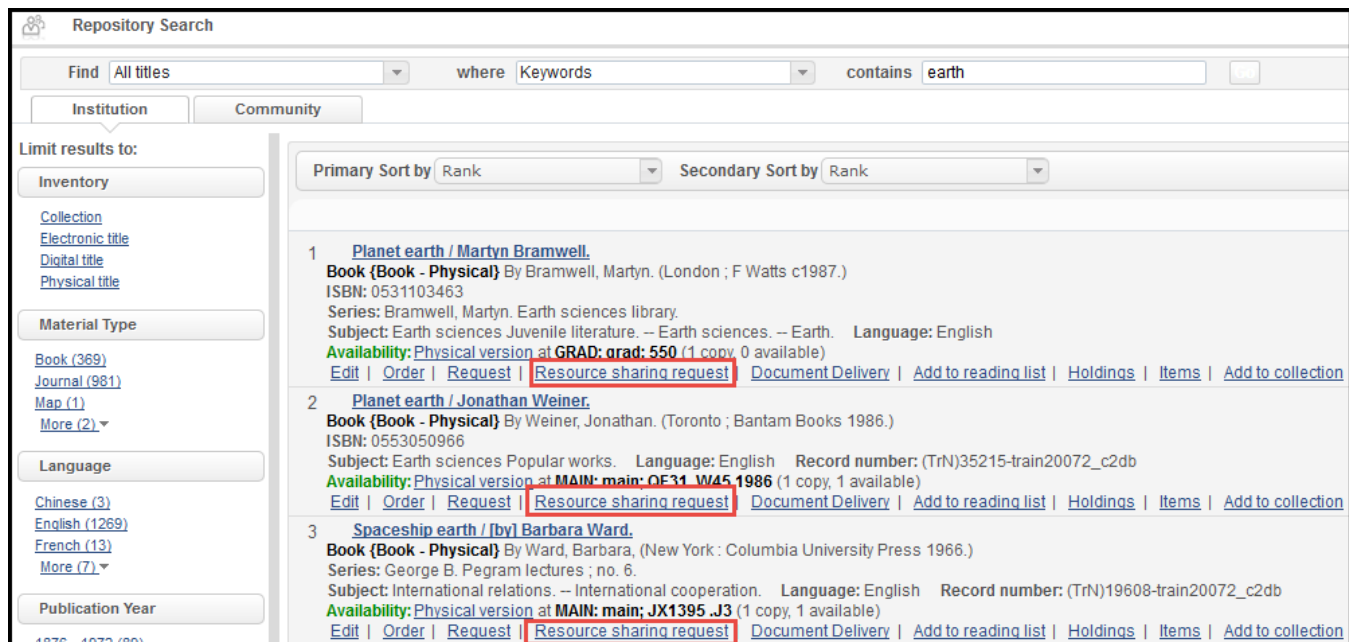


Lookup Agency Response

To set your institution's information that will be transmitted to other partners, enter the protocol or other information into the value of the **resource_sharing_protocol** parameter of the Fulfillment mapping table. For information on modifying this value, see [Configuring Other Settings](#). The complete list of NCIP peer-to-peer parameters is on the [Resource Sharing Request](#) page.

Create a Resource Sharing Request from Search

It is now possible to place a resource sharing request from the repository search result, allowing creation of requests without accessing the task lists. This link is displayed automatically for staff with Fulfillment Services roles in the resource sharing library. The link appears on all item searches except collection, electronic collection, and authorities. See [Searching in the Repository](#).



Create Request from Search

Additional Resource Sharing Enhancements

- Bibliographic data may now be sent in the NCIP Shipltem message. This may be used in cases where an NCIP partner lends an item that doesn't exactly match the original request and you want to include the bibliographic data to specify what is being sent. For more information about the Shipltem message, see the [Developer's Network](#).
- For NCIP peer-to-peer partners, resource sharing requests that include the **Other System ID**, **DOI**, or **Barcode** fields now also include this information in the NCIP message. For more information, see the [Developer's Network](#).
- A new check box, **Ignore electronic resources**, has been added to lending section of the definition of the resource sharing library. If it is checked, the lending locates (manual and automatic) will disregard electronic items.

The screenshot shows a web form titled "Resource Sharing Information". It contains several sections:

- Resource Sharing Information:**
 - Is resource sharing library
 - Itemless
 - Symbol: Cactus_ISO_2_Symbol
- Borrowing Setup:**
 - Cancel request on locate failure
 - Automatically activate locate profile
 - Default location: Borrowing Resource Sharing Requests (dropdown)
 - Default pickup location: (dropdown)
- Lending Setup:**
 - Automatically locate resource
 - Ignore electronic resources** (highlighted with a red box)
 - Automatic creation
 - Default location: (dropdown)
- Locate by fields

At the bottom right, there are "Cancel" and "Save" buttons.

Resource Sharing Library Information

Collaborative Networks - May 2016 Enhancements

Held By Indication for Electronic Collections

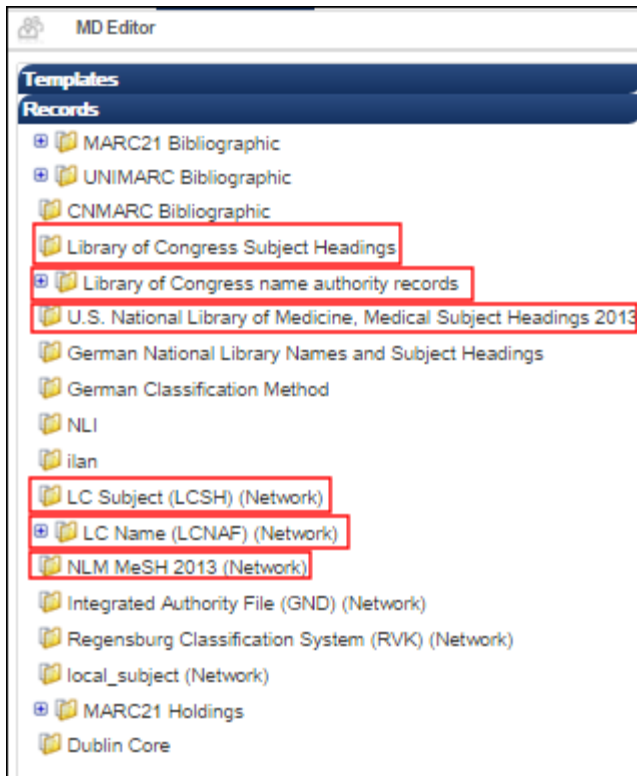
Title searches in the Network Zone will now include the Held By indication for electronic collections available by members.

With the addition of electronic collection level bibliographic record content available in the Community Zone (see [Electronic Collection Bibliographic Records and URLs Added to the Community Zone](#)), the Network Zone will be updated with the electronic collection bibliographic records for those electronic collections that have been activated from the Community Zone by the network members. As a result, the search results for All Titles searches performed by members in the Network tab will include the **Held By** indication for electronic collections.

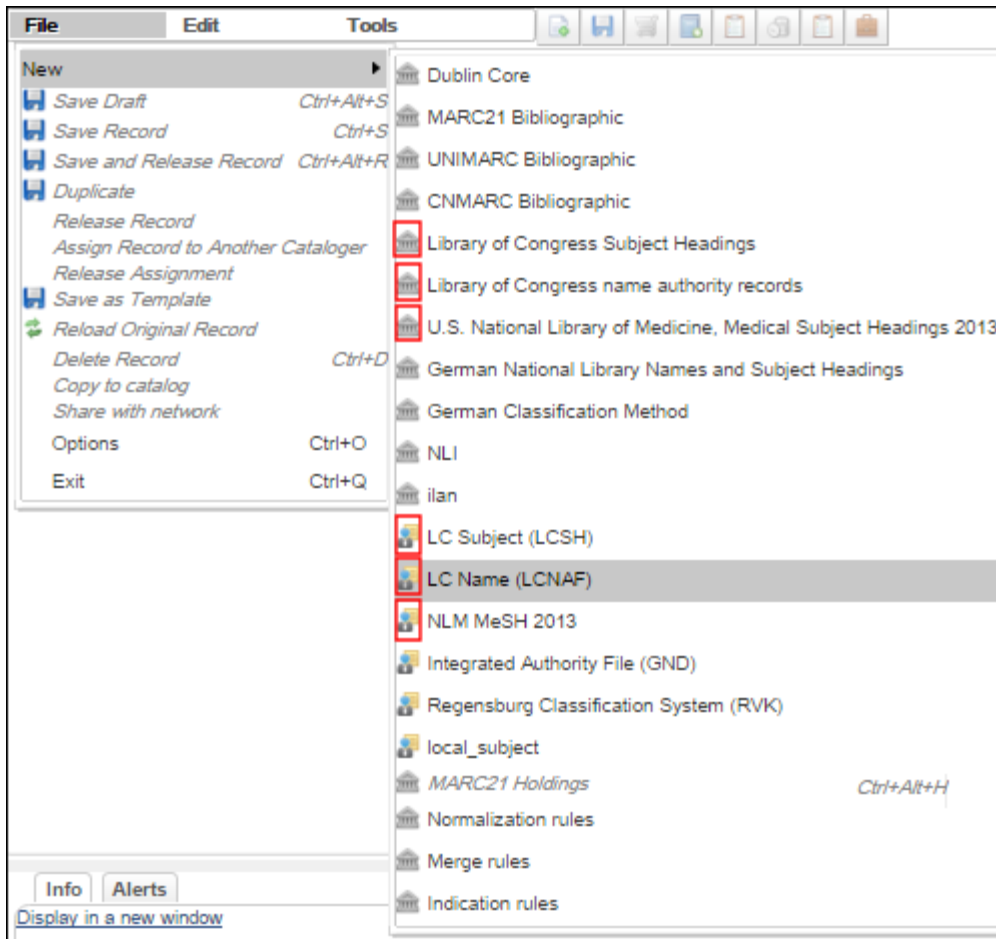
NOTE: Changes to the Network Zone will occur during May 2016 to include the electronic collection level bibliographic record content.

Distinguishing Between Network Level Local Authority Records and Institution Level Local Authority Records

For member institutions that are configured for working with local authorities, improvements have been made in the MD Editor to enable you to more easily distinguish between local authority records at the Institution and Network levels. This is apparent from the labeling changes and addition of icons in the MD Editor Records tab and in the **File > New** menu options.



MD Editor Records Tab for a Member in the Network



MD Editor File > New Menu Options for a Member in the Network

In the MD Editor Records tab of a member, the Network level local authority record is identified by **(Network)** in the name. In the MD Editor **File > New** menu of a member, the Institution and Network level local authority record options are identified with the Institution and Network icons.

Since you identify the level of the local authority (Institution or Network) when you select the **File > New** option, it is no longer necessary to set the **File > Options** to indicate the placement of new local authority records. As a result, this option has been removed from the **File > Options** menu.

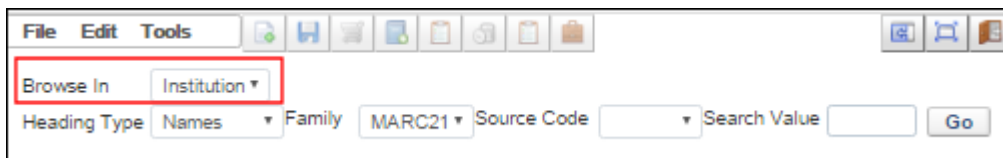


MD Editor File > Options New Local Authority Record Placement Parameter Removed

For more information, see [Working with Authority Records](#).

Browsing Bibliographic Headings in the Network

Browse Bibliographic Headings, available in the April 2016 release, has been expanded to include browsing the headings of the shared catalog managed in the Network Zone for member institutions in a collaborative network environment. For member institutions in such an environment, you can select where you would like to browse using the **Browse In** parameter. The options are to browse the titles at the institution level (**Institution**) or browse the titles at the Network level (**Network**).



Browse In Parameter for Network Members

For more information, see [Browsing Bibliographic Headings](#).

Enhancements to Aleph Central Catalog Integration

The following enhancements were implemented to Alma integration with the Aleph Central Catalog:

- The **Central Catalog Merge Routine** field has been added to the Central Catalog Integration publishing profile. This indicates the merge routine to be used by Aleph when merging changes from a member into the central catalog and allows the central catalog to support variant handling of local fields:

Contribution Configuration	
Host *	dc03kg0414eu.hosted.exlibrisgroup.com
Port *	8991
Library *	MAB01
System Number Prefix *	DE-604
Central Catalog Merge Routine	ALMA1
Username	MASTER
Password	*****
Allow Delete	<input type="checkbox"/>

Central Catalog Merge Routine

- Enhancements have been made to the Central Catalog Integration job history report, including the addition of the **Record not deleted - record ID does not exist** information.

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

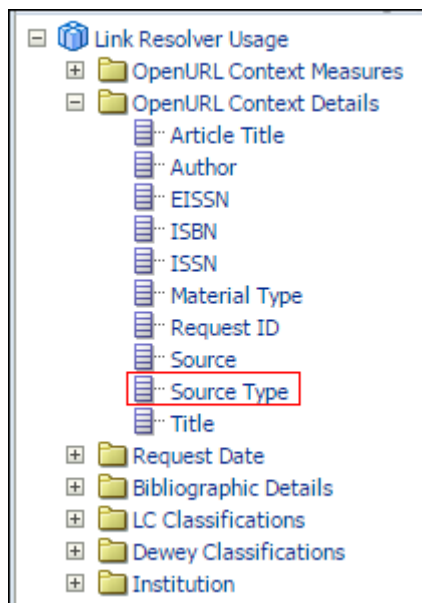
Analytics - May 2016 Enhancements

Source Type Added to Link Resolver Usage

The **Source Type** field has been added to the OpenURL Context Details dimension of the Link Resolver Usage subject area. This field allows libraries to easily gather data about where users are coming from when using the Alma Link Resolver.

The following are the possible values for the **Source Type** field:

- Alma - The link was clicked from within Alma staff user interface.
- Primo and Primo Central - The link was clicked from Primo or Primo Central.
- The source - When the link is clicked from another source, such as Web of Science, Ebsco, Pubmed, Google Scholar, or any other external source, the name of the source is used as the source type.



Source Type

The following is an example of a report using the **Source Type** field:

Source	Source Type ▲▼
AMS:MathSciNet	AMS:MathSciNet
Unknown	Alma
info:sid/primo.exlibrisgroup.com	
EBSCO:L'Année philologique	EBSCO:L'Année philologique
EBSCO:Library Literature	EBSCO:Library Literature
EBSCO:Philosophers Index with Full Text	EBSCO:Philosophers Index with Full Text
EBSCO:SPORTDiscus	EBSCO:SPORTDiscus
EBSCO:Social Work Abstracts	EBSCO:Social Work Abstracts
EBSCO:Women's Studies International	EBSCO:Women's Studies International
Elsevier:Reaxys	Elsevier:Reaxys
Entrez:PubMed	Entrez:PubMed
OVID:medline	OVID:medline
aip_journals	Primo/Primo Central
annual_reviews	
apa_articles	

Source Type Report

For more information, see [Open URL Context Details](#).

Data Services - May 2016

The Alma April 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 March 24th through April 20th:

- Number of records updated: 78
- Number of records added: 116
- Number of records deleted: 9

The following are the Library of Congress Name authority updates for the period of March 24th through April 20th:

- Number of records updated: 19808
- Number of records added: 12003
- Number of records deleted: 554

The following are the Canadian name authority file updates for the period of March 24th through April 20th:

- Number of records added: 916

The following are the MeSH updates for the period of March 24th through April 20th (includes the MeSH 2016 update):

- Number of records updated : 11710
- Number of records added : 8519
- Number of records deleted : 9255

The following are the Library of Congress Genre/Form Terms (LCGFT) updates for the period of March 24th through April 20th:

- Number of records updated : 4
- Number of records added : 2
- Number of records deleted : 7

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone from March 28, 2016 until April 24, 2016:

- Association For Computing Machinery Digital Library 2015-2018
- Independent Scholarly Publishers Group 2016-2018
- BIBSAM Kluwer Law Journals 2016-2018
- BIBSAM Mark Allen Healthcare Journals 2016-2018
- BIBSAM Royal Society Of Chemistry Gold Excl Archive 2015-2017
- BIBSAM Royal Society Of Chemistry Gold Incl Archive 2015-2017
- BIBSAM Sage The Royal Society Of Medicine Journals 2014-2015
- BIBSAM Universitesforlaget Idunn.no Journals 2016
- BIBSAM Wiley Database Model 2016-2018
- Bloomsbury Collections: Anthropology 2015
- Bloomsbury Collections: Biblical Studies 2015
- Bloomsbury Collections: Bloomsbury Open 2015
- Bloomsbury Collections: C.H. Beck Hart Nomos 2015
- Bloomsbury Collections: Classical Studies & Archaeology 2015
- Bloomsbury Collections: Education 2015
- Bloomsbury Collections: Film & Media Studies 2015
- Bloomsbury Collections: Hart Publishing 2015
- Bloomsbury Collections: History 2015
- Bloomsbury Collections: Linguistics 2015
- Bloomsbury Collections: Literary Studies 2015
- Bloomsbury Collections: Philosophy 2015
- Bloomsbury Collections: Politics & International Relations 2015
- Bloomsbury Collections: Religious Studies 2015
- Bloomsbury Collections: Theology 2015
- Ebook Cental
- IEEE Xplore Bell Labs Technical Journal
- IEEE Xplore Communications Library
- IEEE Xplore Computing Library
- IEEE Xplore Conference Library Plus

- IEEE Xplore Conference Proceedings Archive
- IEEE Xplore Enterprise
- IEEE Xplore IBM Journal of Research and Development
- IEEE Xplore Journal of Systems Engineering and Electronics
- IEEE Xplore Journals Archive 1884-1954
- IEEE Xplore Journals Archive 1884-1999
- IEEE Xplore Journals Archive 1955-1964
- IEEE Xplore Journals Archive 1965-1974
- IEEE Xplore Journals Archive 1975-1984
- IEEE Xplore Journals Archive 1985-1994
- IEEE Xplore Journals Archive 1995-1999
- IEEE Xplore Journals Library Plus
- IEEE Xplore MIT Press eBooks 2012
- IEEE Xplore MIT Press eBooks 2012 & Prior
- IEEE Xplore MIT Press eBooks 2013
- IEEE Xplore MIT Press eBooks 2014
- IEEE Xplore MIT Press eBooks 2015
- IEEE Xplore MIT Press Journals Library: Computing & Engineering Collection
- IEEE Xplore Morgan & Claypool Synthesis eBooks Library
- IEEE Xplore Power & Energy Library
- IEEE Xplore SMPTE Conferences
- IEEE Xplore SMPTE Digital Library
- IEEE Xplore Tsingua Science and Technology
- IEEE Xplore Wiley eBooks 2010 & Prior (IEEE Xplore)
- IEEE Xplore Wiley eBooks 2010 (IEEE Xplore)
- IEEE Xplore Wiley eBooks 2011 (IEEE Xplore)
- IEEE Xplore Wiley eBooks 2012 (IEEE Xplore)
- IEEE Xplore Wiley eBooks 2013 (IEEE Xplore)
- IEEE Xplore Wiley eBooks 2014 (IEEE Xplore)
- IEEE Xplore Wiley eBooks 2015 (IEEE Xplore)
- IEEE Xplore Wiley eBooks Library (IEEE Xplore)
- IEEE/IET Electronic Library (IEL)

- JISC Collections Proquest Periodicals Archive Online Collection 1 With Extension
- JISC Collections Proquest Periodicals Archive Online Collection 2 With Extension
- JISC Collections Proquest Periodicals Archive Online Selection 2013-2018
- JISC Collections Royal Society Of Chemistry Gold 2016
- JISC Collections Royal Society Of Chemistry Individual Subscriptions 2013-2015
- JISC Collections Sage IMechE Journals 2015
- JISC Collections Sage Premier 2015
- JISC Collections Sage The Royal Society Of Medicine 2015
- North East Research Libraries (NERL) Springer TONS Gaps 2010-2014 Journals
- Wiley Online Library Opt-in Titles 2014
- Wiley Online Library Opt-in Titles 2015
- Wiley Online Library Opt-in Titles 2016

New External Search Resources

No new external search resources were added for this release.

Using Duplicate Title Analysis

New for May!

PERMISSIONS: To work with Duplicate Title Analysis, you must have one of the following roles:

- Cataloger
- Catalog Manager
- Catalog Administrator
- General System Administrator
- Approving Manager
- Approving Operator
- Editor Full
- Producer Manager
- Technical Analyst
- Repository Manager
- Arranging Manager
- Preservation Analyst
- Preservation Manager
- Arranging Operator
- Assessing Manager
- Assessing Operator
- Depositing Administrator

With Duplicate Title Analysis, you can run a job to create a report that identifies duplicate bibliographic records. Duplicates are determined by looking for a match on one of the following parameters:

- System Control Number (035 field) with or without a prefix such as (oclc)
- ISBN

- ISSN
- Other Standard Identifier (024 field)

Duplicate Title Analysis

After submitting a job, using Duplicate Title Analysis ([Resource Management > Advanced Tools](#)), the job results can be viewed from the History tab on the Monitor Jobs page ([Administration > Manage Jobs > Monitor Jobs](#)). The History tab can also be accessed from the **Job History** link on the Duplicate Title Analysis page.

Duplicate Title Analysis Job



For more information, see the [Duplicate Title Analysis](#) video (1:00 min.).

To run a Duplicate Title Analysis job:

1. Open the Duplicate Title Analysis page ([Resource Management > Advanced Tools > Duplicate Title Analysis](#)).
2. Select one of the following options for matching duplicate bibliographic records:
 - System Control Number / Prefix
The System Control Number parameter uses the MARC 21 035 field for determining a match. In addition, a prefix such as (oclc) contained in the 035 field can be specified to narrow the criteria used for matching on the 035 field. The Prefix field is optional.
 - ISBN
 - ISSN

- Other Standard Identifier

The Other Standard Identifier parameter uses the MARC 21 024 field for determining a match.

Duplicate Title Analysis Parameter Selected

- Click **Submit**. The Running tab opens on the Monitor Jobs page showing the job status of Running (or Pending depending on activity in the jobs queue).

Name	Creator	Submit Date	Start Date	Progress	Status
Duplicate Title Analysis job	admin	08/04/2016 19:51:38 PM IDT	08/04/2016 19:51:38 PM IDT	N/A	Running

Running Tab on the Monitor Jobs Page for the Duplicate Title Analysis Job

- Select the **History** tab to view the job results when the job has completed running.

Name	Job ID	Status
Duplicate Title Analysis - 08/04/2016 19:34:31 PM IDT	140163460000301	Completed Successfully
Duplicate Title Analysis - 08/04/2016 16:52:09 PM IDT	140163280000301	Completed Successfully
Authorities - Link BIB Headings	140160020000301	Completed Successfully

History Tab on the Monitor Jobs Page for the Duplicate Title Analysis Job

- For the Duplicate Title Analysis job that you ran, select **Actions > Report** to open the Job Report page.

Using the Authority Control Task List

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

- Cataloger
 - Catalog Manager
 - Catalog Administrator
-

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 successfully linked headings, there is an **Other Settings** configuration parameter, `authority_control_link_available`, that you may use to indicate if you want to view this information in the **All** tab of the Authority Control Task List page. See [Configuring Other Settings](#) for more information.



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

NOTE: You may find it helpful to use the MMS Creation Date index in the Authorities Advanced Search when working with authority records in the Authority Control Task List. For example, using this search index, you can view a list of new authority records that have been loaded. See [Using the Advanced Search](#) for more information.

To view tasks in the Authority Control Task List:

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

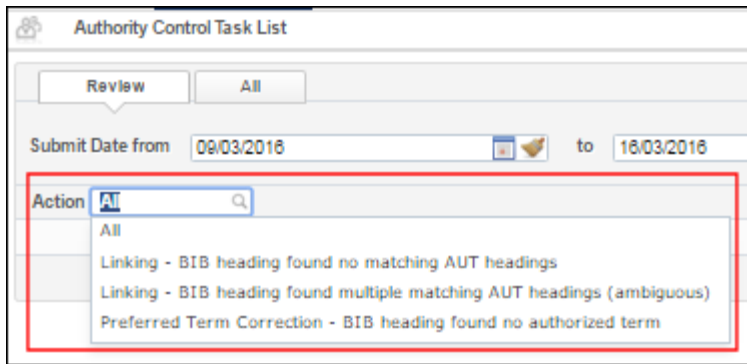
	Report type	Change Date	Mms Id	Title	Vocabulary	Field	BIB Heading	Actions
1	<input type="checkbox"/> Preferred Term Correction - BIB heading found no authorized term	07/04/20...	991397980000541	The Classical Journal	UNAME	710	Classical Association of the Middle West and South.	Actions
2	<input type="checkbox"/> Linking - BIB heading found no matching AUT	07/04/20...	9951440300301	Life	GNDL	650	test Gemeinwesena...	Actions

Authority Control Task List Page

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

The screenshot shows the same interface as above, but with red boxes highlighting the 'Submit Date' filter (set to 06/04/2016 to 13/04/2016) and the 'Action' dropdown menu (set to 'All').

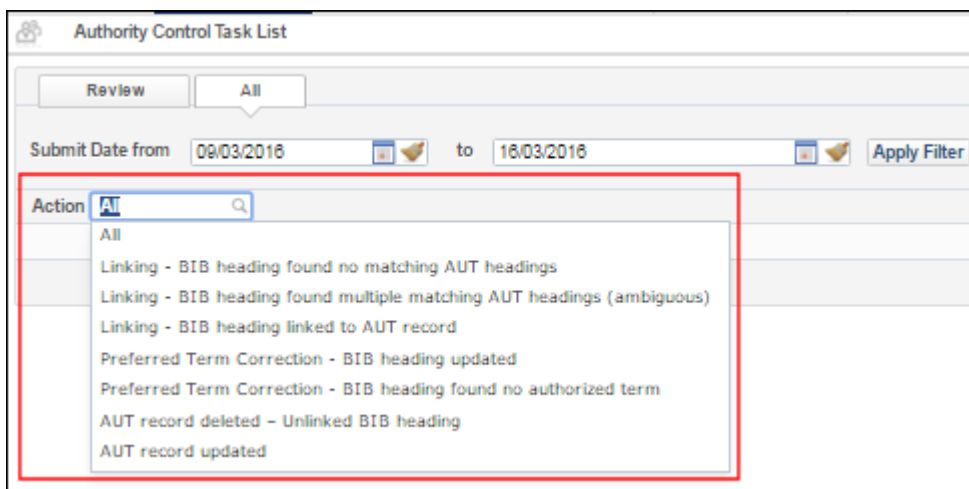
Authority Control Task List Page – Filtering



Review Tab Action Filter

The Review tab provides the following Action options:

- Linking - BIB heading found no matching AUT headings
This option references attempts to find a link between a heading in the bibliographic record and an authority headings record. When no matching authority headings record is found, you may want to review the information in the bibliographic record.
- Linking - BIB heading found multiple matching AUT headings (ambiguous)
This option references attempts to find a link between a heading in the bibliographic record and an authority headings record. In some cases, multiple matches are found. You need to review the possible matches to decide which is the correct one.
- Preferred Term Correction - BIB heading found no authorized term
This option references updates to the bibliographic record with the value of the preferred term of the linked authority record. When the linked authority record does not have a preferred term matching the nonpreferred term (such as when the nonpreferred term is registered in the 410 field and the preferred term is in the 100 field), the bibliographic record is not updated.



All Tab Action Filter

The All tab provides the following Action options in addition to the ones described above for the Review tab:

- Linking - BIB heading linked to AUT record

This options references attempts to find a link between a heading in the bibliographic record and an authority headings record. When a link is formed between a bibliographic heading and an authority record, an entry is created in the task list to show the information of the linked headings.

- Preferred Term Correction - BIB heading updated

This option references updates to the bibliographic record with the value of the preferred term of the linked authority record. When this action is successful, the entry shows the value of the bibliographic record before and after the change.

- AUT record deleted - Unlinked BIB heading

When an authority record is deleted, it is unlinked from the bibliographic headings it used to match. An entry for each such link shows the link prior to its deletion.

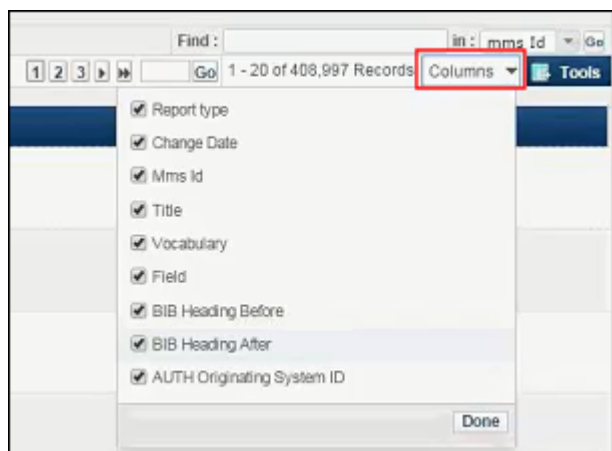
NOTE: The task list shows entries only for deleted authorities that were linked to a bibliographic headings record in the institution. It does not show entries for authority records that were deleted but were not linked to a bibliographic headings record in the institution.

- AUT record updated

For this option, Alma shows information on the updated authority record.

NOTE: The task list shows entries only for updated authority records that were linked to a bibliographic headings record in the institution. It does not show entries for authority records that were updated but were not linked to a bibliographic headings record in the institution.

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.

Authority Control Task List								
							Execute	Back
<input type="button" value="Review"/> <input type="button" value="All"/>								
Submit Date from 06/04/2016 to 13/04/2016 <input type="button" value="Apply Filter"/>								
Action <input type="button" value="All"/> Find: <input type="text"/> in: mms Id <input type="button" value="Go"/>								
1 - 12 of 12 Records <input type="button" value="Columns"/> <input type="button" value="Tools"/>								
	Report type	Change Date	Mms Id	Title	Vocabulary	Field	BIB Heading	Actions
1	Preferred Term Correction - BIB heading found no authorized term	07/04/20...	991397980000541	The Classical journal.	UNAME	710	Classical Association of the Middle West and South.	<input type="button" value="Actions"/>
2	Linking - BIB heading found no matching AUT	07/04/20...	9951440300301	Life	GNDL	650	test Gemeinwesena...	<input type="button" value="Actions"/>

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 optionally 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 nonq--

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

- When you have completed your review and/or change, use the **Actions > Dismiss** option to remove a task from the list. You may also choose to dismiss multiple records by selecting the row check box in the check box column, choosing **Dismiss Selected**, and clicking **Execute**.

New for May!

To edit tasks and process changes with the Authority Control Task List:

- Open the Authority Control Task List page (**Resource Management > Cataloging > Authority Control Task List**).
- Select **Actions > Edit** for the task that you want to edit. Optionally, you may choose to edit multiple records by selecting the row check box in the check box column, choosing **Edit Selected**, and clicking **Execute**.

Authority Control Task List						Cancel	Edit Selected	Execute	Back
Review All									
Submit Date from 02/04/2016 to 09/04/2016 Apply Filter									
Action All Find: 991301460000541 in: mms Id Go									
1 - 4 of 4 Records Columns Tools									
	Report type	Title	Vocabulary	Field	BIB Heading				
1	Linking - BIB heading found multiple matching AUT headings (ambiguous)	World without end /	LCNAMES	100	Follett, Ken.	Actions			
2	Linking - BIB heading found no matching AUT headings	World without end /	GSAFD	855	Historical fiction.	View hidden Dismiss Edit			
3	Linking - BIB heading found no matching AUT headings	World without end /	LCNAMES	100	Follett, Ken.	Actions			
4	Linking - BIB heading found no matching AUT headings	World without end /	LCNAMES	810	Great Britain Fiction. History 14th century	Actions			

Authority Control Task List Edit Action

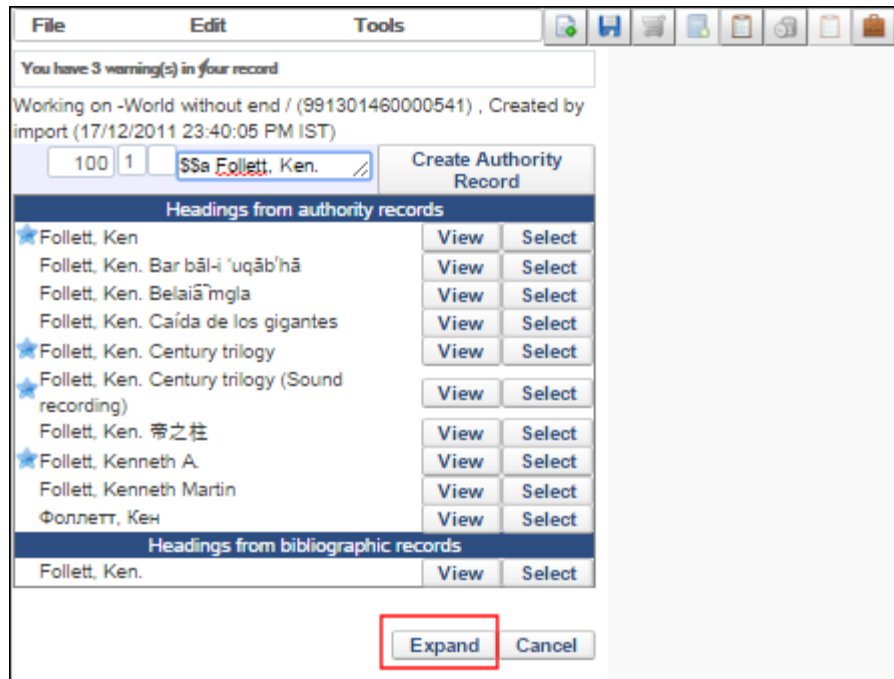
The record is opened in the MD Editor to the field that has the issue and highlights that field with the green background color. If there are additional fields in the record with issues, they are also highlighted in green.

File	Edit	Tools			
You have 3 warning(s) in your record					
Working on -World without end / (991301460000541) , Created by import (17/12/2011 23:40:05 PM IST)					
LDR			00646cam#a22002418a#4500		
001			56673		
005			20071017112250.0		
008			070627s2007#####nyu#####000#1#eng		
010			\$\$a 2007026639		
020			\$\$a 9780525950073		
035			\$\$a 14905331		
035			\$\$a (TrN)56673-train20072_c2db		
040			\$\$a DLC \$\$c DLC		
043			\$\$a e-uk-en		
050	0	0	\$\$a PR6056.O45 \$\$b W67 2007		
082	0	0	\$\$a 823/.914 \$\$2 22		
100	1		\$\$a Follett, Ken.		
245	1	0	\$\$a World without end / \$\$c Ken Follett.		
260			\$\$a New York : \$\$b Dutton, \$\$c c2007.		
263			\$\$a 0710		
300			\$\$a p. cm.		
810	2	0	\$\$a Great Britain \$\$x History \$\$y 14th century \$\$v Fiction.		
850		0	\$\$a Black Death \$\$z England \$\$v Fiction.		
855		7	\$\$a Historical fiction. \$\$2 gsafd		
OWN			\$\$a Training Master DB		

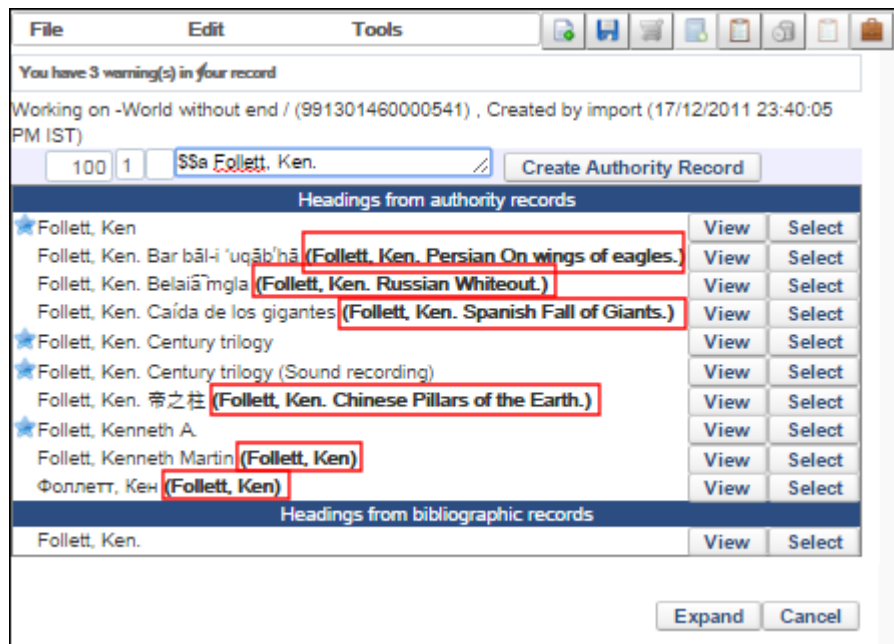
Field with the Issue Opened in the MD Editor

- Edit the record as you normally would.
- When you use F3 to view preferred/nonpreferred terms, there is an **Expand** option that you can use to display

additional details for nonpreferred terms. The additional details are highlighted in bold and can be especially helpful when the nonpreferred terms are similar.



Display of Preferred/Nonpreferred Terms



Expanded Display with Additional Details for Nonpreferred Terms

4. Save your changes.

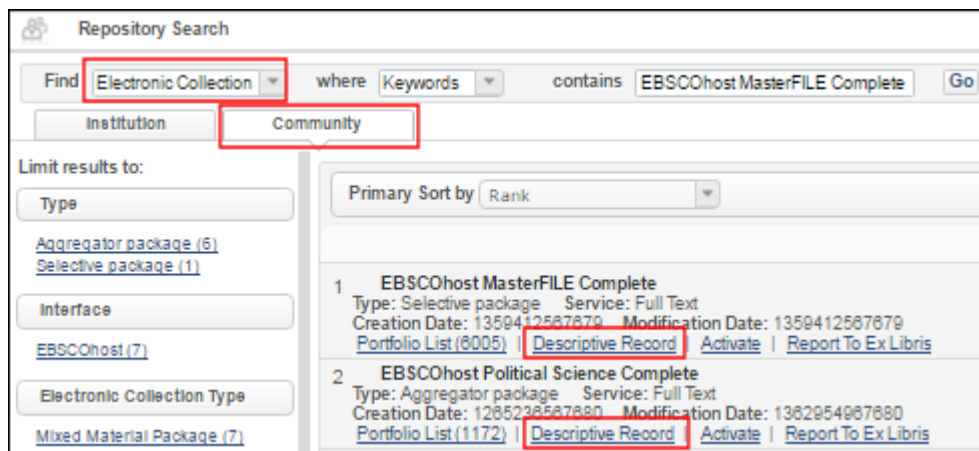
5. From the Authority Control Task List page when you are finished with the task(s), select the **Actions > Dismiss** option. You may also choose to dismiss multiple records by selecting the row check box in the check box column, choosing **Dismiss Selected**, and clicking **Execute**.

Working with Electronic Collection Bibliographic Records and URLs Added to the Community Zone

New for May!

Bibliographic records (descriptive records) for electronic collections and URLs are available in the Community Zone. The addition of bibliographic records and URLs to the electronic collections provides an option to expose and provide access to electronic collections to patrons via the discovery system. The bibliographic records and URLs are updated in the Community Zone as part of the CKB update process.

The electronic collection bibliographic records can be accessed by completing an Electronic Collection search from the Community tab in Alma's Repository Search and clicking the **Descriptive Record** link to open the electronic collection's bibliographic record.



Repository Search

Find **Electronic Collection** where **Keywords** contains **EBSCOhost MasterFILE Complete** **Go**

Institution **Community**

Limit results to:

- Type
- Aggregator package (6)
- Selective package (1)
- Interface
- EBSCOhost (7)
- Electronic Collection Type
- Mixed Material Package (7)

Primary Sort by Rank

- 1 EBSCOhost MasterFILE Complete
Type: Selective package Service: Full Text
Creation Date: 1359412567879 Modification Date: 1359412567879
Portfolio List (8005) **Descriptive Record** Activate Report To Ex Libris
- 2 EBSCOhost Political Science Complete
Type: Aggregator package Service: Full Text
Creation Date: 1285236567880 Modification Date: 1362954967880
Portfolio List (1172) **Descriptive Record** Activate Report To Ex Libris

Descriptive Record Link in the Community Zone Electronic Collection Search Results

See [Repository Search Results Actions](#) for more information.

From the MARC Record Simple View, you can copy the bibliographic record or link to it.

MARC Record Simple View Back Copy Link

Title Complete Guide to Building Affordable Earth-Sheltered Homes: Everything You Need to Know Explained Simply
MMS ID 99341000000004169
Originating system CKB Originating system ID (CKB)341000000004169 Originating System Version -
Suppress from publishing No Export to WorldCat Don't publish Brief record No
Brief level - Record Format marc21

Tools

LDR ----nam-a22----z--4500
008 130809uuuuuuuuuuuuu-|----u|---|eng-d
245 00 |a Complete Guide to Building Affordable Earth-Sheltered Homes: Everything You Need to Know Explained Simply
246 __ |a Complete Guide to Building Affordable Earth-Sheltered Homes
020 __ |a 1-80138-373-8
035 __ |a (CKB)341000000004169
906 __ |a BOOK

Electronic Collection Bibliographic Record from the Community Zone

In a Network environment, there is the additional **Copy to Network** option (see below).

MARC Record Simple View Back Copy to network Copy Link

Title Philosophy for A2: Unit 3
MMS ID 992670000000325117
Originating system CKB Originating system ID (CKB)2670000000325117 Originating System Version -
Suppress from publishing No Export to WorldCat Don't publish Brief record No
Brief level - Record Format marc21

Tools

LDR ----cam-a22----z--4500
008 151109u2013uuuuuuuuu-|----u|---|eng-d
020 __ |e 0-203-71764-3
020 __ |e 1-283-98974-2
020 __ |e 1-135-86784-4
020 __ |a 1-138-12763-9
020 __ |a 0-415-45822-6
035 __ |a (CKB)2670000000325117
245 00 |a Philosophy for A2: Unit 3
246 __ |a bkey=9780203717648
246 __ |a Philosophy for A2
260 __ |a Hoboken |b Taylor and Francis
906 __ |a BOOK

Electronic Collection Bibliographic Record from the Community Zone in a Network Environment

When you activate an electronic collection from the Community Zone (see [Activating an Electronic Collection Using the Activation Wizard](#) for more information), the URL stored in the Community Zone for the electronic collection displays in the Electronic Collection Information section on the Activation Wizard page. To override this URL, enter a new URL in the **Electronic Collection Level URL** parameter.

Activation Wizard: Electronic Collection and Services Setup 1 Cancel Next

Electronic Collection Information

Electronic Collection name EBSCOhost MasterFILE Complete
 Type Selective package Number of portfolios 6005
 Electronic Collection Level URL <https://www.ebscohost.com/public/masterfile-complete>
 Additional descriptive information

Local Electronic Collection Information

Public name
 Library
 Electronic Collection Level URL
 Additional descriptive information EBSCOhost Mark Bib as suppressed
 Electronic Collection Proxy No Yes: Electronic Collection Proxy Selected

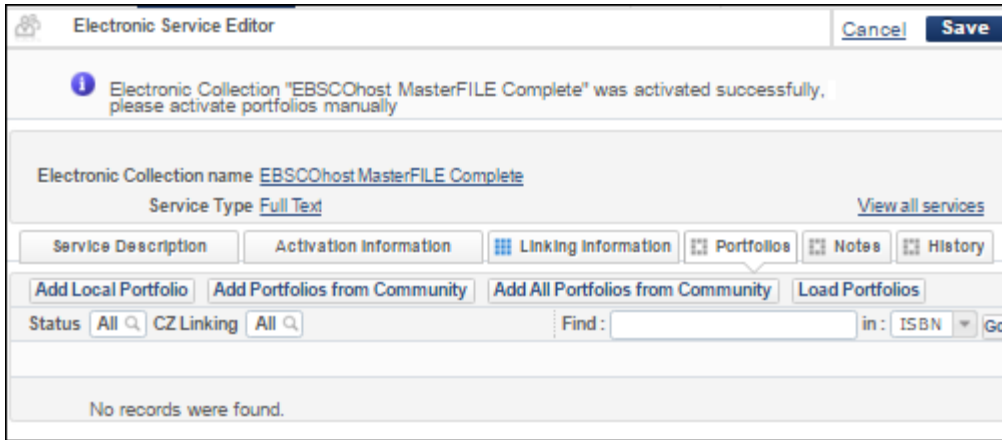
Full Text Service

Activate this electronic collection service Make service available
 Active From Date Active Until Date
 Automatically activate new portfolios
 Service public name
 Service Public Note
 Service Authentication Note

Override the URL as Part of the Activation Process

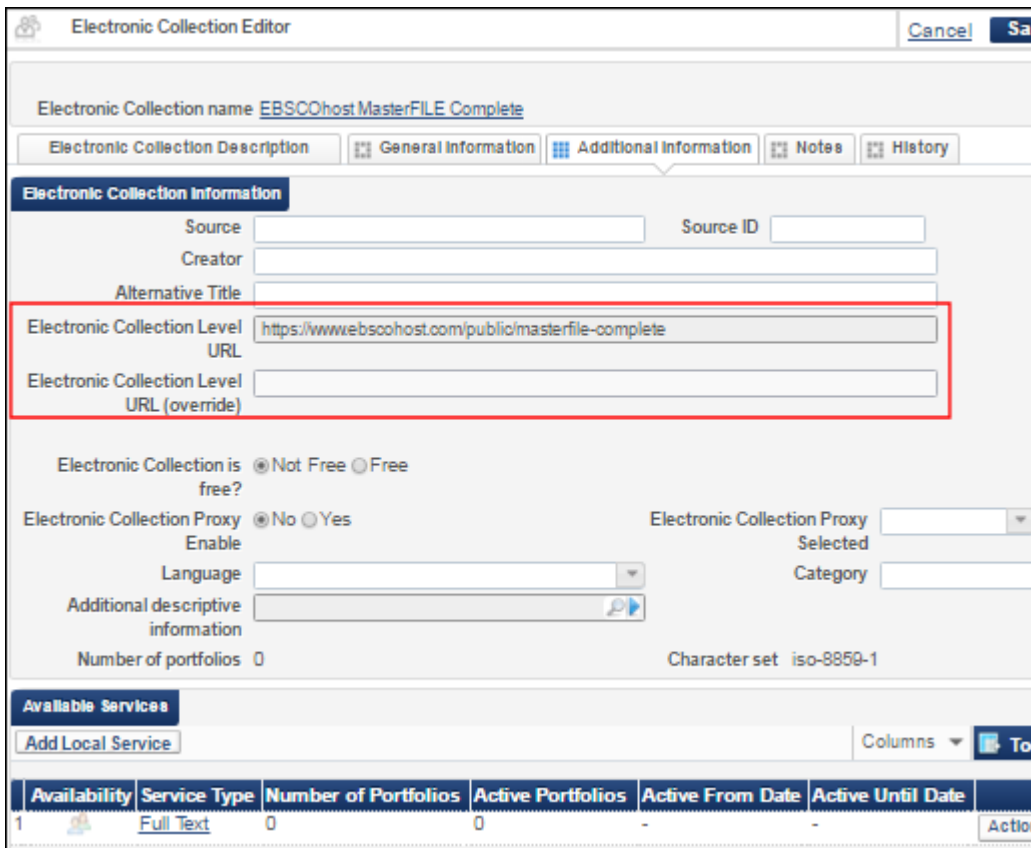
As part of the activation process, you can also select a new bibliographic record for the **Additional descriptive information** parameter, and the **Mark Bib as suppressed** is selected as the default. If you choose not to mark the bibliographic record as suppressed, the bibliographic record is published to the discovery system and access to the electronic collection will be available through the Alma Link Resolver by directing the user to the electronic collection level URL.

Complete the remaining activation parameters as you normally would, and click **Activate**. The Electronic Service Editor page appears with a confirmation message of successful activation. Click **Save** to complete the process.



Electronic Service Editor Page After Electronic Collection Activation

If you need to override an electronic collection URL for an electronic collection that you have activated, you can do that using the Electronic Collection Editor and specifying a new URL for the **Electronic Collection Level URL (override)** parameter.



Electronic Collection Level URL Parameters in the Electronic Collection Editor

The **Electronic Collection Level URL** parameter displays the URL from:

- The URL identified in the Community Zone for the (activated) electronic collection
- The URL identified for a completely local electronic collection (not activated from the Community Zone)

The **Electronic Collection Level URL (override)** parameter may contain the override to the URL stored in the Community Zone or the URL created for a completely local electronic collection.

For a local electronic collection, you can create and edit both the **Electronic Collection Level URL** parameter and the **Electronic Collection Level URL (override)** parameter in the Electronic Collection Editor.

The screenshot shows the 'Electronic Collection Editor' interface. At the top, the 'Electronic Collection name' is 'CC Electronic Collection'. Below this are four tabs: 'Electronic Collection Description', 'General Information', 'Additional Information', and 'Notes'. The 'Additional Information' tab is selected and highlighted with a red box. Under this tab, there is a section titled 'Electronic Collection Information'. Within this section, the 'Electronic Collection Level URL' field is highlighted with a red box and contains the text 'http://www.amazon.com'. Below it, the 'Electronic Collection Level URL (override)' field is also highlighted with a red box and is currently empty. Other fields in the section include 'Source', 'Creator', and 'Alternative Title'. Below the 'Electronic Collection Information' section, there are radio buttons for 'Electronic Collection is free?' (Not Free, Free), 'Electronic Collection Proxy Enable' (No, Yes), a 'Language' dropdown menu, and an 'Additional descriptive information' field with a search icon. At the bottom, there is a section for 'Available Services' with a sub-section for 'Add Local Services'.

Electronic Collection Level URL Parameter for a Local Electronic Collection

NOTE: During May 2016, the Community Zone will be updated with the electronic collection bibliographic record and URL content. For instances where you previously entered an **Electronic Collection Level URL** parameter for an electronic collection activated from the Community Zone, this parameter will be placed in the **Electronic Collection Level URL (override)** parameter as part of the migration to this new capability. Indexing of the **Electronic Collection Level URL** for advanced search access will be completed as part of the July full re-indexing process.

Configuring Copyright Declarations

You can configure a copyrights statement for digital resources. This statement can be associated with an access rights policy to be displayed to patrons before they can view a digital resource. The DigitizationRequestCopyrightDeclaration form is displayed on the digitization request form. The resourceSharingCopyrights form is displayed on the resource sharing request form.

To configure copyrights:

1. From the Alma Main Menu (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment**), click **Copyright Declaration**. The following appears:



Custom	Filename	Description	Updated by	Update Date	Actions
1	resourceSharingCopyrights.html	Auto_CopyRight_Default_0111150707	exl_support	01/11/2015	Actions
2	copyrights/copyrights2.html	-	admin	05/04/2016	Actions
3	copyrights/copyrights1.html	-	Admin	07/03/2011	Actions
4	DigitizationRequestCopyrightDeclaration.html	Digitization Request Copyright Declaration	-	-	Customize

Copyrights

Sample copyrights statements are available for you to customize.

2. Click **Customize** for a copyrights statement. The following, for example, appears:

Copyrights Statement

3. Edit the copyrights statement, if you want, and click **Customize**.

After you edit a copyrights statement the following actions are available:

- **Edit** – Edit the copyrights statement
- **Restore** – Restore the copyrights statement to the default
- **View Default** – View the default copyrights statement

New for May! The sample shown above is the Digitization Request Copyrights Declaration. Entering content on this form will cause a checkbox to appear in Primo, asking the patron to confirm that they have read the copyright agreement before submitting a Primo digitization request form.

Configuring Electronic Document Delivery Rules

PERMISSIONS: To configure electronic document delivery rules, you must have one of the following roles:

- General System Administrator
 - Fulfillment Administrator
-

Electronic document delivery rules provide functionality that enables libraries to take portions of a resource and make digital copies of that portion only. These rules define the conditions under which libraries can perform this function.

Each electronic document delivery rule can be either enabled or disabled. By default, each new rule is enabled.

You configure electronic document delivery rules on the Electronic Document Delivery Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Electronic Document Delivery Rules**).



Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input checked="" type="checkbox"/>			Test Rule 1	This is a test for the electronic document delivery rule	Support, Ex Libris	26/08/2013

Default Rule
[Default Electronic Document Delivery Rule](#) Default Electronic Document Delivery Rule [Edit](#)

Electronic Document Delivery Rules List Page

NOTE: Electronic document delivery rules can be configured at the institution level only. Select the institution from the **You are configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add electronic document delivery rules (see [Adding Electronic Document Delivery Rules](#))
- Edit electronic document delivery rules (see [Editing Electronic Document Delivery Rules](#))
- Duplicate electronic document delivery rules (**Actions > Duplicate** and modify the relevant fields)
- Delete electronic document delivery rules (**Actions > Delete**)
- Disable electronic document delivery rules (click the yellow check mark  to the left of the electronic document delivery rule. To enable a disabled electronic document delivery rule, click the gray check mark  to the left of the electronic document delivery rule.)

Adding Electronic Document Delivery Rules

The electronic document delivery rules that you define apply to all libraries within the institution.

Each electronic document delivery rule can be either enabled or disabled. By default, each new rule is enabled.

To add a new electronic document delivery rule:

1. On the Electronic Document Delivery Rules List page ([Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Electronic Document Delivery Rules](#)), click **Add Rule**. The Electronic Document Delivery Rules Editor page appears.

NOTE: If you want to create a copy of an existing electronic document delivery rule, select **Actions > Duplicate**. Once you have copied the rule, you can modify it as needed.

Electronic Document Delivery Rules Editor	
Name *	<input type="text"/>
Description	<input type="text"/>
Created By -	Created On 29/08/2013
Updated By -	Updated On 29/08/2013
Input Parameters	
No records were found.	
Name	Operator
<input type="text"/>	<input type="text"/>
	Possible Values >
	Value
	<input type="text"/>
	Add Parameter
Output Parameters	
Name	Result
IsAllowed	* True <input type="text"/>

Electronic Document Delivery Rules Editor Page

2. In the **Electronic Document Delivery Rules Editor** section, specify a name (required) and description (optional) for the new rule.
3. In the **Input Parameters** section, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *User group = Graduate student* or *Inventory owner = Art Library*.
4. Click **Add Parameter**. The set of input parameters is added to the list of parameters for the electronic document delivery rule.
5. Repeat the previous two steps to add all the required parameters for the rule.

NOTE: All the input parameters must be fulfilled in order for the rule to be applied. If not all the input parameters are fulfilled, the default electronic document delivery rule will be applied.

- In the **Output Parameters** section, select whether electronic document delivery should (**True**) or should not (**False**) be allowed.
- Click **Save** to store the new rule.

Electronic Document Delivery Rules List						
Rules List						
Filter: All						
Add Rule						
Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input checked="" type="checkbox"/>			No Patron Requesting	-	-	15/03/2012
<input checked="" type="checkbox"/>	▲	▼	a	a	-	13/03/2012
<input checked="" type="checkbox"/>	▲	▼	Rule_1	-	-	29/08/2013
<input checked="" type="checkbox"/>	▲	▼	Allow Patron and RS	-	-	15/03/2012
Default Rule						
Default Electronic Document Delivery Rule			Default Electronic Document Delivery Rule		Edit	

Electronic Document Delivery Rules List Page

- If you have defined more than one rule, on the Electronic Document Delivery Rules List page, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important, as the system applies the first (and only the first) appropriate, enabled rule.

Editing Electronic Document Delivery Rules

You can edit the default electronic document delivery rule or a digitization profile rule that you added.

To edit electronic document delivery rules:

- On the Electronic Document Delivery Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Electronic Document Delivery Rules**), select **Actions > Edit** for the electronic document delivery rule that contains the input parameters you want to update, or click the **Edit** link under **Default Rule** to update the default electronic document delivery rule. The Electronic Document Delivery Rules Editor page appears.
- Modify the rule name and description as required.

NOTE:

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default rule.

- Click **Delete** for the specific set of input parameters record you want to delete.
- Add a new set of input parameters, as described in [Adding Electronic Document Delivery Rules](#).
- In the **Output Parameters** section, select whether electronic document delivery should (**True**) or should not (**False**) be allowed.

6. Click **Save** to store your changes to the electronic document delivery rule.

The default rule has no configuration parameters and can only be activated (**True**) or deactivated (**False**), as follows:

- **True** – Indicates that if no electronic document delivery rule is met, the document is still sent.
- **False** – Indicates that if no electronic document delivery rule is met, the document is not sent.

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**.

New for May! Customizing Primo Request Forms

PERMISSIONS:

To configure the displayed fields on the Primo request forms, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Non-mandatory fields on the Primo request forms may now be hidden from the patron's view. Each of the three forms below, hold request, booking request, and digitization request, have their own customization table with the field names listed. All fields except the general use label field initially default to `Yes`, making them visible on the form. For the digitization request form, the default for the **Partial** field may also be customized using the `uresolver_partial_digitization_default_value` parameter on the Other Settings page so that **Partial** may be set to `True` and then hidden. This would be done if the library wants to restrict patron digitization requests to only partial digitization requests. For information on customizing this parameter, see [Configuring Other Settings](#).

The general use label is hidden by default. It is a new field that has been added to the forms as a display field to give information to the patrons. The text of the general use label can be configured, as seen in the [Configuring Labels](#) section above.

To customize the visible fields on the Primo request forms:

1. All three tables are accessed from the **Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic** menu.
The page names are:
 - Hold Request Form Customization**
 - Booking Request Form Customization**
 - Digitization Request Form Customization**
2. For each field to be changed, click **Customize** and then select the desired option from the **Display to Public** drop down box.
3. Click Save.

NOTE:

Mandatory fields such as the Pickup Location field cannot be hidden.

Mapping Table [Cancel](#) [Save](#)

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

Table Information

Sub System: FULFILLMENT Table Name: Mashup Hold Request Form
 Updated By: - Last Updated: -
 Table Description:

Mapping Table Rows [Tools](#)

	Field Name	Display to Public	
1	comment	Yes	Customize
2	generalUseLabel	No	Customize
3	materialType	Yes	Customize
4	notNeededAfter	Yes	Customize
5	termsOfUse	Yes	Customize

[Cancel](#) [Save](#)

Hold Request Form Customization

Mapping Table [Cancel](#) [Save](#)

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

Table Information

Sub System: FULFILLMENT Table Name: Mashup Booking Request Form
 Updated By: - Last Updated: -
 Table Description:

Mapping Table Rows [Tools](#)

	Field Name	Display to Public	
1	checkAvailability	Yes	Customize
2	comment	Yes	Customize
3	generalUseLabel	No	Customize
4	materialType	Yes	Customize

[Cancel](#) [Save](#)

Booking Request Form Customization

Mapping Table
[Cancel](#) [Save](#)

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

Table Information

Sub System: FULFILLMENT Table Name: Mashup Digitization Request Form

Updated By: - Last Updated: -

Table Description:

Mapping Table Rows

Tools

#	Field Name	Display to Public	
1	chapterArticleAuthor	Yes	Customize
2	chapterArticleTitle	Yes	Customize
3	comment	Yes	Customize
4	endPage	Yes	Customize
5	fullChapter	Yes	Customize
6	generalUseLabel	No	Customize
7	notNeededAfter	Yes	Customize
8	partial	Yes	Customize
9	startPage	Yes	Customize

Tools

[Cancel](#) [Save](#)

Digitization Request Form Customization

Creating a Request from the Institution

A Circulation Desk Operator/Manager creates a request by searching the repository for titles or items in the institution (see [Searching the Repository](#)), and then doing one of the following:

- Creating a request for a title
- Creating a request for an item

For details on creating a request for a title or item, see [Creating a Request](#).

You can also create a work order request, as needed (see [Creating a Work Order Request](#)).

You can move requests from one circulation desk to another using the Transfer Requests option (see [Transfer Requests](#)).

Creating a Request

PERMISSIONS: To create a request, you must have the following role:

- Fulfillment Services Operator

After locating a specific title or item in the institution's repository, you can create a request for it.

NOTE:

- The type of request that you can create, and its limitations, depend on whether the title/item is physical or electronic, whether the titles have holdings and if these are monograph or serial, and the policies of the item (see [Configuring Item Policies](#)), the fulfillment unit that will service the request (see [Configuring Policies](#)), and the institution (see [Configuring Terms of Use](#)).
- A patron may be blocked from borrowing items (see [Blocking Users](#)).
- You can request an item belonging to a bibliographic record for which an item is already on loan to the requesting patron. To do so, ensure that the **enable_request_during_loan_for_different_policy** value is **true** in the Customer Parameters Mapping Table (see [Configuring Other Settings](#)).

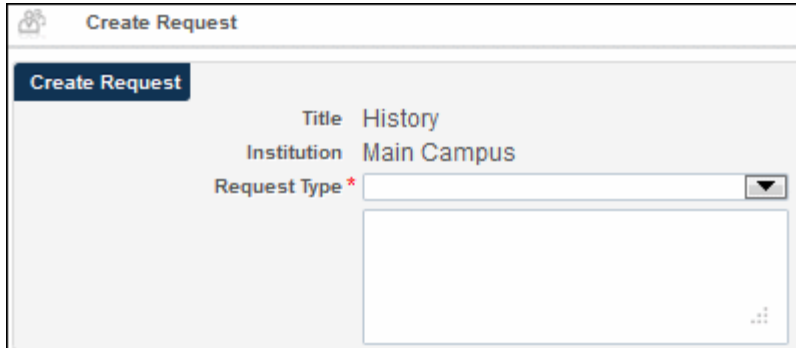
For item-level requests and title-level requests with only one item, Alma can be configured to mark the requested item as not available. The item being requested will be marked as **Item not Available** and will have a **Process**

status of **Requested**. In such cases, if you release or cancel the request, the item's **Status** becomes **Item in Place**. To enable this functionality, contact Ex Libris Support.

For the list of resource requests, see [Request Status](#).

To create a request:

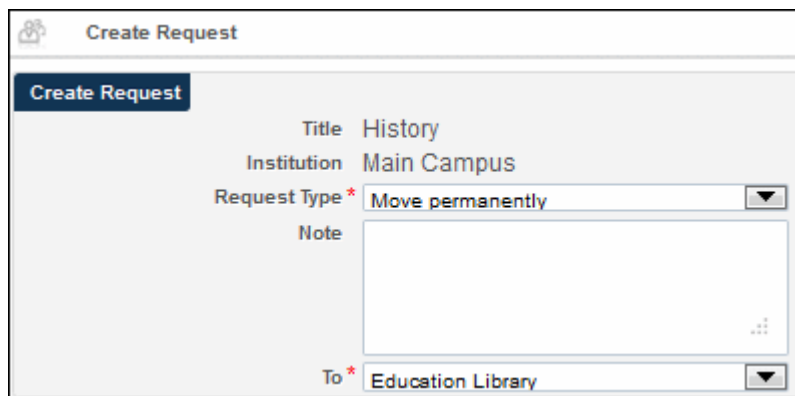
1. For physical items, click **Request** underneath a title/item on the Repository Search page (see [Searching the Repository](#)). For electronic titles/items, click **Document Delivery**. The Create Request page appears.



The screenshot shows the 'Create Request' page with the following fields: 'Title' (History), 'Institution' (Main Campus), and 'Request Type *' (a dropdown menu). A 'Note' field is also present but empty.

Create Request Page

2. From the **Request type** drop-down list, select the type of request.
 - **Booking request** - Reserve resources for a patron during a specified time frame. For details on creating a booking request, see [Creating Booking Requests](#).
 - **Move permanently / Move temporarily** - Permanently or temporarily change the location of a physical title or item. The **To** drop-down list appears, enabling you to select a library.



The screenshot shows the 'Create Request' page with the following fields: 'Title' (History), 'Institution' (Main Campus), 'Request Type *' (Move permanently), 'Note' (empty), and 'To *' (Education Library).

Move Permanently Request

For additional fields in this area, see [step 3](#).

When moving a title, all items associated with the title are moved.

- **Patron digitization request / Patron Electronic Digitization Request** - Create a digital copy (in full or in part) of a physical/electronic title or item on behalf of a patron. The **Requester** and **Managing Department** drop-down lists appear, enabling you to select the patron and the digitization department.

New for May! Select **Copyright Declaration Signed by Patron** to indicate that the patron selected his or her agreement with the copyright when submitting the request.

For an article, additional fields are described in step 3.

The digitization request generates a temporary move request to move the item to the digitization department. After digitizing, another request is generated to return the item to its permanent location.

The screenshot shows a 'Create Request' form with the following fields and values:

- Title:** History & criticism /
- Institution:** University of Texas at Dallas
- Request Type:** Patron digitization request (dropdown menu)
- Requester Type:** Description (radio button selected), Manual (radio button unselected)
- Requester:** (empty text input field)
- Year:** (empty dropdown menu)
- Volume:** (empty dropdown menu)
- Description:** c. 1 (dropdown menu)
- Note:** (empty text area)
- Managing Department:** (empty dropdown menu)
- Copyright Declaration Signed by Patron:** (checkbox unselected)

Patron Digitization Request for an Article

If you select **Partial Digitization** in the **Add Request Attributes** area (see [step 4](#)), the **Notes** field becomes **Part to Digitize** and the fields **Chapter/Article Title**, **Chapter/Article Author**, **Start Page**, **End Page**, and **Full Chapter** appear below this.

For additional fields in this area, see step 3.

- **Patron physical item request** - Create a request to loan a physical title or item to a patron. The **Requester** and **Pickup At** drop-down lists appear, enabling you to select the patron and the destination for pickup.

Create Request

Create Request

Title Test record, title : used to produce test cards /

Institution QA - Provisioning

Request Type * Patron digitization request

Requester * |

Note

Chapter/Article Title

Chapter/Article Author

Start Page End Page

Full Chapter

Managing Department *

Physical Item Request

NOTE: The **Pickup At** field includes the locations specified in the Borrowing Terms of Use by the Pick Up Location policy.

Click **Override 'On Shelf Request Policy'** to override the configured fulfillment policy that determines where you can pick up resources. This enables you to request any pickup location.

For title-level requests, Alma chooses an appropriate item based on the following criteria:

- All items must be available in the repository.
- When multiple items in the same location are located for a request, an item is chosen randomly.
- By default, a remote storage facility item receives the lowest priority to fulfill the request. In these cases, a request is registered on a remote storage item only if no other item is found.

You can configure remote storage locations to take priority over non-remote storage locations by selecting the **Prefer over other locations** setting when configuring remote storage locations (see [Adding a Remote Storage Facility](#)).

- An item whose location is the same as the request's pickup location receives the highest priority to fulfill the request.

You can enable a physical item request to be delivered to a user's home or office. For details, see [Creating Personal Delivery Requests](#).

For additional fields in this area, see step 3, below.

- **Staff Digitization Request / Staff Electronic Digitization Request / Library physical digitization request** - Create a digital copy (in full or in part) of a physical title or item on behalf of a staff member. The staff member's request may be the result of a request by an instructor. The **Managing Department** drop-down list appears, enabling you to select a digitization department that receives the digitization request.

The digitization request generates a temporary move request to move the item to the digitization department. After digitizing, another request is generated to return the item to its permanent location.

If you select **Partial Digitization** in the **Add Request Attributes** area, the fields **Chapter/Article Title**, **Chapter/Article Author**, **Start Page**, **End Page**, and **Full Chapter** appear below the **Note** field.

New for May!

In addition, several fields appear in the **Copyright Attributes** section. These fields are used to record intended usage information. If copyright approval is required by the digitization rules, an approval task appears on the Approval Requests List page; see [Digitization Processing](#). Fill in the fields:

- **Number of Students**
- **Number of Copies for Students**
- **Number of Copies for Staff**
- **Resource Total Pages**
- **Required Chapters**
- **Total Chapters Count**
- **Required Pages** – The **From** and **To** pages that will be digitized.
- **Source** (CLA-enabled institutions only) - For CLA-enabled institutions in the UK, select one of the following values:
 - **A - From Paper original owned by institution**
 - **B - From Digital original licensed to institution**
 - **C - From copyright fee paid copy**
 - **D - From another HEI under Shared Provision**

To enable CLA, set **display_CLA_info_in_alma** to **true**, see [Configuring Other Settings](#).

- **Date Available To** – The date until which any copies will be made available.
- **Note 1/2/3** – Private notes, if any.

Staff Digitization Request

- **General Hold Request** - Appears only when placing a request for a holding that contains no items. For details on creating a general hold request, see [Creating a General Hold Request](#).

3. The following additional fields may appear:

- Enter any notes in the **Notes** field.

The remaining fields in this step appear only for physical serial items, or for physical titles that contain at least one serial item.

- Select one of the following radio buttons:
 - **Description** – Use the description that appears in the **Description** field, below.
 - **Manual** – Enter a manual description in the **Manual Description** field, below.

These buttons appear when there are no items associated with the title. In this case, **Manual** is assumed.

If you select **Description**, the following fields appear:

- **Year** – Year for the request.

- **Volume** – Volume for the request.
- **Description** – The descriptions of the items. The option **All** appears if you did not select both **Year** and **Volume** and there are items without descriptions. Select **All** to indicate all items (including those without descriptions).

If you select **Manual**, or if the title has associated holdings but no items, the following fields appear:

- **Holding** – Select a holding for the item. See [Creating a Non-Cataloged Serial Item Request](#).
- **Manual Description** – Enter a description. See [Creating a Non-Cataloged Serial Item Request](#).

For holdings in remote storage, if the **Allow Manual Description Requests** option has been disabled on the configuration for the remote storage facility, selecting **Manual** will cause the holdings in remote storage to be suppressed from the available items for this request. See [Configuring Remote Storage Facilities](#).

4. Add request attributes in the **Add Request Attributes** area. After selecting each attribute and its corresponding value, click **Add Request Attribute**. The attribute appears in the **Additional Request Attributes** area. The available attributes depend on the selected **Request Type**:

Request Attributes

Request Type	Attribute	Description
Booking Request		See Creating Booking Requests .
Move Permanently or Move Temporarily	Number of Copies	The number of copies requested
	Destination Locations	Where to deliver the copies
	Due Back For Move Temporarily only	When the items are due back
	Call Number Type	See <code>call_number_type</code> in Configuring Other Settings .
	Call Number	The call number
	Item Policy	The item's override policy for loan rules. For more information, see Configuring Item Policies .

Request Type	Attribute	Description
Patron Digitization Request / Patron Electronic Digitization Request /	Partial Digitization	Select to indicate that the request is for only part of the item, not the entire item. After you click Add Request Attribute , the fields Chapter/Article Title , Chapter/Article Author , Start Page , End Page , and Full Chapter are added to the Create Request area above.
Staff Digitization Request / Staff Electronic Digitization Request /	Material Type Not available for Patron Electronic Digitization Request	Select the desired material type from the available types.
Library physical digitization request	Date Needed By	Select the date that the request is needed from the calendar tool.
Patron Physical Item Request	Material Type	Select the desired material type from the available types.
	Date Needed By	Select the date that the request is need by from the calendar tool.
	Loan Period	The amount of time the user has before having to return the item.
General Hold Request		See Creating a General Hold Request .

To remove an attribute, click **Remove** in the **Additional Request Attributes** area.

5. Click **Submit**. The request is created with a unique identification number and processed (see [Resource Requests](#)). A completed request appears on the Resource Request Monitoring page with the following information:

- **Workflow Step:** Pickup from shelf
- **Process Status:** New
- **Managed by Library:** The library where the available inventory is located

- **Managed by Desk:** The circulation desk where the available inventory is located

A patron receives notification that an item is ready for pickup from the hold shelf after the **Hold Shelf Processing** status is complete.

For details on the resource request workflow, see [Resource Requests Workflow](#).

For a digitization request, the request appears on the In Process Items page (see [Digitizing Items](#)). For more information, see [Digitization Processing](#).

Creating a Work Order Request

PERMISSIONS: To create a request, you must have the following role:

- Fulfillment Services Operator
-

A work order indicates that a process needs to be run on a physical item. Work order types are created on the Work Order Types page, accessible from the General Configuration menu (see [Configuring Work Order Types](#)).

You can monitor the progress of work orders on the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**).

To create a work order request:

1. Click **Work Order** underneath an item displayed from a physical items search on the Repository Search page. The **Work Order** option appears only when searching the repository for physical items.

The Place Item in Process page opens.



Place Item in Process Page

Managing Citations

PERMISSIONS: To manage a citations, you must have one of the following roles:

- Fulfillment Services Operator
 - Fulfillment Services Manager
-

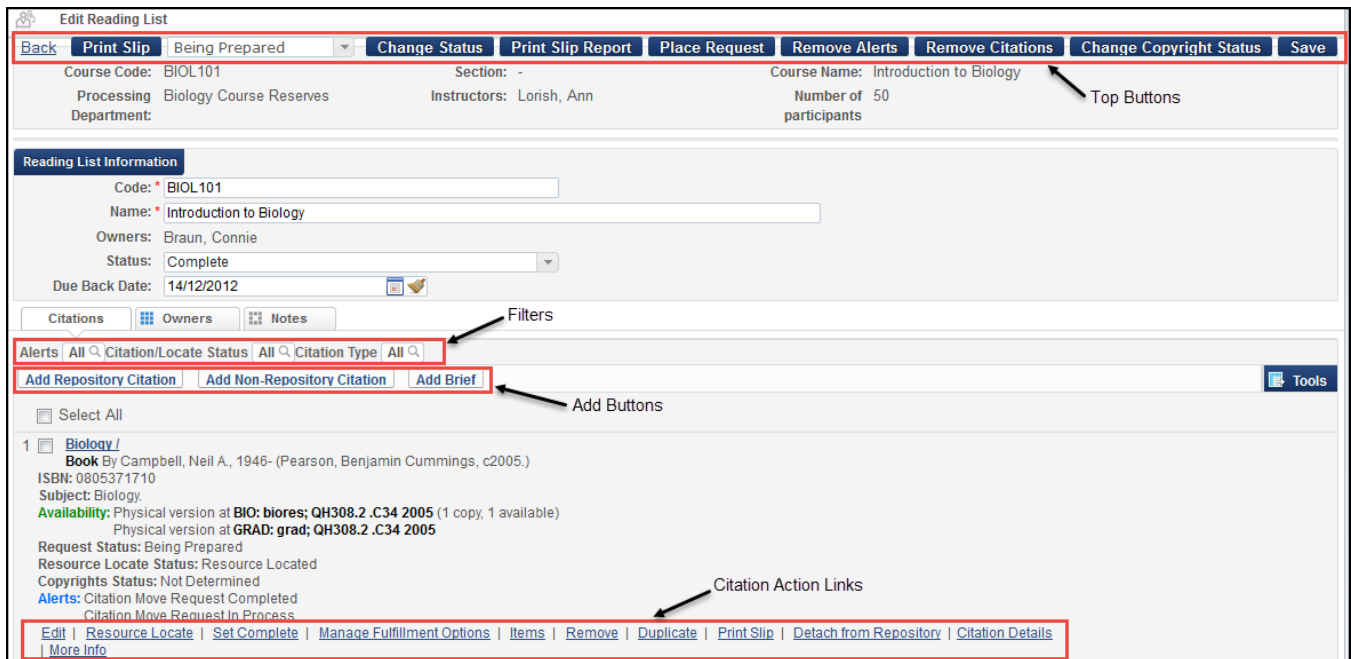
Citations can be for books or articles, in either electronic or physical format, and must supply sufficient detail to uniquely identify the item. This includes author(s), date of publication, title, and page numbers. You can also use unique identifiers such as the International Standard Book Number (ISBN), a URL for a website, or specific volumes, articles, or other identifiable parts of a periodical.

NOTE:

- Since book chapters, journal articles, and conference papers are parts of larger documents, their titles may be different than the title of the entire document. Similarly, the authors may be different from the author or editor of the entire document. Their citations include details regarding the sources in which they appear.
 - Citations added using the Alma UI or the Alma Web service API are added to the default section of a reading list.
 - Citations that are linked to active courses are published to Primo with course information included. The following can be retrieved by a Primo search: course IDs, course names, and instructor names. Note that for this information to be published to Primo, the **Course information enrichment** check box must be selected in the Primo publishing profile.
-

Citations can be linked to the repository/inventory items or not. Titles not linked to the repository are typically faculty resources that are not part of the institution's inventory.

You manage reading list citations on the Citations tab of the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list or select **Actions > Work on**).



Edit Reading List Page – Citation Action Areas

Actions available to manage citations are available in several groups:

- You can filter the list of citations using the filters.
- To manage one or more existing citations, select the check boxes next to the desired citations, or select the **Select All** check box, and then click one of the buttons on the top or bottom of the page.
- To manage a single existing citation, click one of the action links beneath the citation.
- To add a citation, duplicate an existing citation or click one of the **Add** buttons at the top of the list of citations (beneath the citation list filters):
 - **Add Repository Citation** adds a citation and connects it to an item in the repository
 - **Add Non-Repository Citation** adds a citation that is not in the repository
 - **Add Brief** adds an item to the repository, and then adds a citation that is connected to it

After making any changes, click **Save** to save the changes and return to the Reading Lists Tasks List page.

The available actions to manage citations on this page are as follows:

Managing Citations Actions

Action	Procedure
Adding a citation	See Adding Citations to a Reading List .

Action	Procedure
Viewing information about a citation	<ul style="list-style-type: none"> ■ To view additional information about a citation, click More Info beneath a citation. A pop-up window displays additional information about the citation. You can click links in the pop-up window to view a citation's related inventory and related courses. ■ To view a citation's items or portfolios, click Items or Portfolio List beneath the citation. The List of Items or Portfolios List page appears. For more information about the List of Items page, see Using the List of Items. For more information about the Portfolios List page, see Using the Portfolio List. <p>New for May!</p> <ul style="list-style-type: none"> ■ To view the original source of a citation added using Leganto Cite It, click View Source. This link appears if a Source is defined for the citation. ■ For an article, to view the OpenURL link resolver results of an article, click View It. This link appears if the link resolver found at least one matched resource. ■ For CLA-enabled institutions in the UK, to view a popup with copyright information about the citation retrieved from the CLA, click Check CLA Permissions. A popup with the information appears. Select the type of work you intend to perform in the dropdown at the top of the popup.

Action	Procedure
--------	-----------

ISBN: 076790818X
 Subject: Popular works. -- Science Popular works. -- Science, and others
 Availability: Physical version at JBCL: GEN; Q162 .B88 2003 (2 copies, 1 available)
 Section Name: First Week
 Request Status: Being Prepared
 Copyright Status: Waiting for Approval

[Edit](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Items](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Check CLA Permission](#)

2

Identifier 076790818X

Usage type Digital

Status Warning

Not found

This title was not found in our database.
 If published in the United Kingdom, this title is not covered by your CLA licence unless the publisher is listed in which case it is covered for the following uses:
 Designated Persons may:
 If published in the United States of America, this title is not covered by your CLA licence.
 For titles published in other countries, please check the information on International Territories

Make digital copies
 Print paper copies
 Email digital copies
 Store digital copies on a Secure Network
 Use digital copies in PowerPoint presentations
 Send digital copies to overseas students, who may print a single copy
 Other uses specific to the CLA Higher Education Licence - see terms and conditions for details

If published in the United States of America, this title is not covered by your CLA licence. For titles published in other countries, please check the information on International Territories <http://he.cla.co.uk/complying-with-your-licence/what-can-be-copied/international-territories/here> This text is intended for use as guidance only and not as a substitute for the CLA <http://he.cla.co.uk/your-he-licence/your-he-licence/about-the-cla-higher-education-licence/licence-terms-and-conditions/Licence> Terms themselves, which should be read in full. In the event of conflict between the two, the Licence shall prevail. For permissions not listed above, please contact the publisher direct. If you are unsure of the correct permission or have any questions please email permissions@cla.co.uk?Subject=Titlesearch%20NotFound%20Query

3
4
5
6

Personality and Individual Differences
 Section Name: First Week

Check CLA Permissions

To enable CLA, set **display_CLA_info_in_alma** to true, see [Configuring Other Settings](#).

Action	Procedure
Editing a citation	<p>You can edit a citation, for example to improve its metadata.</p> <p>To edit a citation, click Edit beneath a citation. The Edit Reading List Citation page appears. Modify the information in the Citation tab as required and click Save. For information on the fields in the Citation tab, see Adding Citations to a Reading List.</p> <p>To add or edit citation notes, click the Notes tab, add, edit, or delete notes as required, and click Save.</p> <p>To add or edit citation tags, click the Tags tab, add or delete tags as required, and click Save. You can filter using these tags on the Edit Reading List page.</p>
Managing a citation's attachment to an inventory item	<p>See Managing a Citation's Attachment to an Inventory Item.</p>
Managing a citation's fulfillment options	<p>See Managing Citation Fulfillment Options.</p>
Attaching citation attributes to a citation	<p>See Attaching Citation Attributes to Citations. Also see Editing a citation above for adding tags to a citation.</p>
Printing slips for citations	<p>See Printing Slips for Citations or Generating a Citation Print Slip Report.</p>
Changing a citation's status	<p>Changing a citation status does not change the reading list status, and vice versa.</p> <p>To change citation statuses, select the citations, select the status from the drop down to the left of the Change Status button at the top or bottom of the page, and click Change Status.</p> <p>Alternately, to set a citation's status to complete, click Set Complete beneath the citation.</p> <p>The available statuses are the same as those for the reading list itself. See Adding a Reading List. For information on configuring citation statuses, see Configuring Reading List Citation Statuses.</p>
Changing a citation's copyright status	<p>The copyright status field is purely for informational purposes, to inform the reading list owners about whether copyright issues for the citations are approved or not. To change the copyright status of citations, select the citations and click Change Copyright Status, select the status in the Change Copyright Status pop-up that appears, and click Update.</p>

Action	Procedure
	<div data-bbox="293 296 1576 653" style="border: 1px solid black; padding: 10px;"> <div data-bbox="310 338 602 373" style="background-color: #2c4e64; color: white; padding: 2px 5px; font-weight: bold;">Change Copyright Status</div> <div data-bbox="610 390 1045 562"> <p>Copyrights Status <input type="radio"/> Approved <input type="radio"/> Declined <input checked="" type="radio"/> Not Determined <input type="radio"/> Not Required <input type="radio"/> Required</p> </div> <div data-bbox="1295 596 1533 632" style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Update"/> </div> </div> <p>The available statuses are:</p> <ul style="list-style-type: none"> ■ Approved ■ Declined ■ Not Determined ■ Not Required ■ Required <p>You can configure the status that is selected by default for a new citation. See Configuring the Default Copyright Status of Reading List Citations.</p>
<p>Creating requests for citations</p>	<p>You can place requests on one or more citations in order to move the items (permanently or temporarily) or to digitize them. You might place a bulk move request if, for example, the reading list's due-back date changes. To create a bulk requests, select the citations and click Place Request. The Create Request page appears (see Create Request Page). Select a request type, fill in the remaining fields (as described in Creating a Request) and click Submit.</p> <p>The requests are:</p> <ul style="list-style-type: none"> ■ Library physical digitization request ■ Move permanently ■ Move temporarily <p>To create a patron purchase request for a citation, click Purchase Request beneath a citation. For more information see Patron Purchase Requests.</p>
<p>Removing alerts from citations</p>	<p>If the inventory items are geographically far and/or you have no access to the shelves on which they are located, use the fulfillment options to place and then view requests. (See To manage fulfillment options for a resource.)</p>

Action	Procedure
	<p>In this case, for each step in the citation request workflow, an alert is generated – for example, Citation Digitization Request In Process, Citation Digitization Request Completed. You can use the Alerts filter to monitor the status of physical items that you have requested to move to reserved areas or material that you have requested in digital format. For example, you can use the Alerts filter to view only those citations whose request processing has been completed (in order to mark their status as Complete)</p> <p>To remove all alerts from citations, select the citations and click Remove Alerts.</p>
Removing citations	<p>Select the citations and click Remove Citations. Click Confirm in the confirmation dialog box.</p> <p>Alternately, click Remove beneath the citation.</p>

Adding Citations to a Reading List

Add a citation using one of the three workflows or by duplicating an existing citation and editing the copy.

NOTE: You can also create a citation by scanning in an item and selecting the appropriate reading list in the Change Item Information tab. The item is added as a citation to the selected reading list. For details on the Change Item Information tab, see [Changing Item Information](#).

To add a citation already in the repository:

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the **Citations** tab, click **Add Repository Citation**. The Repository Search page appears.

Repository Search Page

2. Enter the search criteria and click **Go**. You must select one of the titles values in the **Find** box (**All titles**, **Physical titles**, **Electronic titles**, or **Digital titles**). The Repository Search page displays records that match the search criteria. For more information on the Repository Search, see [Using the Repository Search](#).
3. Select the citation item you want to add, and click **Select**. The new citation appears in the **Citations** tab of the Edit Reading List page.

To add copyright clearance information or to configure other citation information (see **To add a citation that is not in the repository (without adding it to the repository)**), you must edit the citation after adding it. To edit the citation, click **Edit** beneath the citation on the Reading List page.

To add a citation that is not in the repository (without adding it to the repository):

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the **Citations** tab, click **Add Non-Repository Citation**. A dialog box appears.
2. In **Citation type**, select the type of citation: Click **Choose**. The Edit Reading List Citation page (for non-repository citations) appears, containing the fields for the selected citation type (see the following images).

The image shows a web form titled "Resource Information" with a list of input fields for citation data. The fields are arranged vertically and include:

- Title *
- Author
- Author Initials
- Edition
- ISBN
- LCCN
- OCLC Number
- Other Standard ID
- Barcode
- Remote Record ID
- Publisher
- Publication Date
- Place of Publication
- Additional Person Name
- Source
- Series Title Number
- Call Number
- Note
- Volume
- Part
- Chapter
- Pages

Edit Reading List Citation Page (for non-repository citations) for a Book

Resource Information	
Article\Chapter Title *	<input type="text"/>
Journal Title	<input type="text"/>
Author	<input type="text"/>
Volume	<input type="text"/>
Author Initials	<input type="text"/>
Issue	<input type="text"/>
ISSN	<input type="text"/>
LCCN	<input type="text"/>
OCLC Number	<input type="text"/>
Other Standard ID	<input type="text"/>
Barcode	<input type="text"/>
Remote Record ID	<input type="text"/>
DOI	<input type="text"/>
PMID	<input type="text"/>
Publisher	<input type="text"/>
Place of Publication	<input type="text"/>
Additional Person Name	<input type="text"/>
Source	<input type="text"/>
Series Title Number	<input type="text"/>
Note	<input type="text"/>
Chapter	<input type="text"/>
Pages	<input type="text"/>
Start Page	<input type="text"/>
End Page	<input type="text"/>
Publication Date	<input type="text"/>

Edit Reading List Citation Page (for non-repository citations) for an Article

Copyright Attributes

Copyright Auditing Required

Number of Students

Number of Copies for Students

Number of Copies for Staff

Resource Total Pages

Required Chapters

Total Chapters Count

Required Pages From To

From To

Total Required Pages

Source (for CLA)

Date Available To

Note 1

Note 2

Note 3

Citation Parameters

Disable Resolving

Copyright Status

Material Type

Public Note

Citation Attributes

Quick Add

Citation Attributes Types

Citation Attributes

[Add citation attribute](#)

Edit Reading List Citation Page (for non-repository citations) – Bottom of Page (Book or Article)

3. In the **Resource Information** area, enter the necessary information in the fields. A description of the fields appears in the [Resource Information Fields](#) table.
4. **New for May!** In the **Copyright Attributes** area, select **Copyright Auditing Required** to add intended usage information. When selected, fill in the additional fields that appear. For information on these fields, see [Creating a Request](#).
5. In the **Citation Parameters** area, optionally select:

- **New for May!** **Disable Resolving** (Leganto customers only) - Whether to prevent Leganto from displaying OpenURL links for the resource. See [Managing a Citation's Attachment to an Inventory Item](#). You can turn off link resolving for all article citations using a customer parameter; see [Configuring Repository Search in Leganto](#).
- **Copyright Status** - For more information, see Changing a citation's copyright status, above
- **Material Type** - Select an available option.

- **New for May!** **Public Note** (Leganto customers only; edit only) - Edit a public note that appears in Leganto, if relevant.

6. Click **Save** or **Save and Manage Approval**. The new citation appears on the Edit Reading List page.

Alma checks if a single inventory item matches the citation, and if so the citation is automatically linked to that inventory item. You can click **Detach from Repository** to remove this attachment. See [Managing a Citation's Attachment to an Inventory Item](#).

New for May! If you click **Save and Manage Approval**, the Approval Requests List appears. For more information, see [Approving/Rejecting a Request for Digitization](#).

7. Optionally click **Resource locate** on the Edit Reading List page to locate a resource for the new citation. For more information, see [Managing Citation Fulfillment Options](#).

To add a citation that is not in the repository and also add it to the repository:

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the **Citations** tab, click **Add Brief**.
2. In the dialog box that appears, select the type of citation you want to create—physical book/article or electronic book/article—and click **Choose**. The Quick Cataloging page appears.

Resource Information	
Title *	<input type="text"/>
Author	<input type="text"/>
Author Initials	<input type="text"/>
Edition	<input type="text"/>
ISBN	<input type="text"/>
LCCN	<input type="text"/>
OCLC Number	<input type="text"/>
Other Standard ID	<input type="text"/>
Barcode	<input type="text"/>
Remote Record ID	<input type="text"/>
Publisher	<input type="text"/>
Publication Date	<input type="text"/>
Place of Publication	<input type="text"/>
Additional Person Name	<input type="text"/>
Source	<input type="text"/>
Series Title Number	<input type="text"/>
Call Number	<input type="text"/>
Note	<input type="text"/>
Volume	<input type="text"/>
Part	<input type="text"/>
Chapter	<input type="text"/>
Pages	<input type="text"/>
Course Restricted	<input type="checkbox"/>
Suppress from Discovery	<input type="checkbox"/>
Record Format	MARC21 Bibliographic <input type="button" value="v"/>
Citation Parameters	
Copyright Status	Not Determined <input type="button" value="v"/>
Material Type	Book <input type="button" value="v"/>
Item Information	
Library	<input type="text"/> <input type="button" value="🔍"/>

Quick Cataloging Page – For Physical Book

3. Configure resource and item information (for information on the fields, see [Adding a New Book or Journal Article](#)). In the **Citation Parameters** area, optionally select the **Copyright Status** (for more information, see [Changing a citation's copyright status in the above table](#)) and **Material Type** from the available options.
4. Click **Save**. New inventory is created and the new citation appears in the **Citations** tab of the Edit Reading List page.

To add copyright clearance information or to configure other citation information (see **To add a citation that is not in the repository (without adding it to the repository)**), you must edit the citation after adding it. To edit the citation, click **Edit** beneath the citation on the Reading List page.

NOTE: The `course_restricted_bib_date_will_be_deleted` parameter (see [Configuring Other Settings](#)) determines whether the published course data created in this process is deleted (**true**) or suppressed (**false**, by default) from Primo when the course becomes inactive.

If you have enabled the RFID integration profile (see [RFID Support](#)), you can click **Write to RFID and Save** to save the new inventory to RFID.

To add a citation by duplicating an exiting citation:

On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the **Citations** tab, click **Duplicate** beneath a citation. The Edit Reading List Citation page appears. Modify the parameters as needed and save the new citation. See the above add procedures for details.

Managing a Citation's Attachment to an Inventory Item

When you create a citation, you can create it attached to an already existing inventory item, or you can create the inventory item at the same time and have the citation attached to the new inventory item.

To remove this attachment, click **Detach from Repository** beneath a citation. After performing this action, the citation is not connected to any inventory. (If you are using Leganto, to prevent Leganto from displaying OpenURL links - but not actually detach the citation from the inventory - edit the citation and select **Disable Resolving**.)

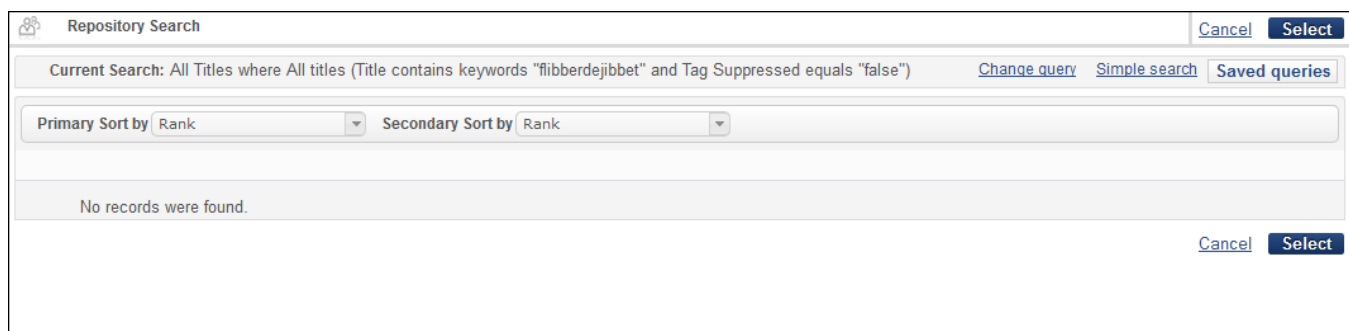
When you create a citation without any attachment to an inventory item, Alma tries to locate a matching inventory item. If a single item is discovered, Alma automatically attaches the citation to the inventory item. For more information, see [Configuring Citation Matching Criteria](#).

If you have detached the citation from an inventory item, or the inventory could not be located automatically, you can try to attach the citation to an inventory item manually.

To locate a resource manually:

Click the **Resource Locate** link beneath a citation. Alma attempts to locate inventory that matches the citation and if a single inventory match (in any format) is found, Alma attaches it automatically.

If Alma could find no matches, Alma displays a screen allowing you to edit the search criteria. If Alma finds multiple matches, Alma displays a screen enabling you to select one of the matches or edit your search criteria. For more information, see [Searching in the Repository](#).



The screenshot shows a web interface titled "Repository Search". At the top right, there are "Cancel" and "Select" buttons. Below the title, a search bar contains the text: "Current Search: All Titles where All titles (Title contains keywords "fibberdejibbet" and Tag Suppressed equals "false")". To the right of the search bar are links for "Change query", "Simple search", and "Saved queries". Below the search bar, there are two dropdown menus: "Primary Sort by Rank" and "Secondary Sort by Rank". The main content area displays the message "No records were found." At the bottom right of the interface, there are "Cancel" and "Select" buttons.

Resource Locate - No Matches

Managing Citation Fulfillment Options

To check how the citation can be made available to students, on the Edit Reading List page ([Fulfillment > Course Reserves > Reading Lists](#); click the reading list) in the **Citations** tab, click **Manage Fulfillment Options** links beneath the citation.

- If the inventory items are geographically far and/or you have no access to the shelves on which they are located, use the fulfillment options to place and then view requests. (see below.)

In this case, for each step in the citation request workflow, an alert is generated — for example, **Citation Digitization Request In Process**, **Citation Digitization Request Completed**. You can use the **Alerts** filter to monitor the status of physical items that you have requested to move to reserved areas or material that you have requested in digital format. For example, you can use the **Alerts** filter to view only those citations whose request processing has been completed (in order to mark their status as Complete). To remove the alerts, see [Removing alerts from citations](#) in the above table.

- If the inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by clicking the **Print slip** link beneath a citation to print a slip for the specific citation. Use the Change Item Information tab to temporarily change the item location, as described in [Changing Item Information](#).
- If the item is not in your library's inventory, or if you would like the library to purchase additional copies, consider making a patron purchase request by clicking **Purchase Request** beneath the citation. For more information, see [Patron Purchase Requests](#).

To manage fulfillment options for a resource:

Click the **Manage Fulfillment Options** link below the citation. The Manage Resource Options page appears.

The link is available only if a resource was specified.

Manage Resource Options Cancel Update Move Expiry Remove Alerts Place Request

Title: Taxing multinationals : transfer pricing and corporate income taxation in North America / Author: Eden, Lorraine. ISBN: 0802007767
 Place Of Publication: Toronto ;:University of Toronto Press Chapter: - Pages: -
 Additional Person Name: - Year: c1998. Edition: -
 Call Number: HD2753.N55
 Note: -
 Alerts: -

Course Details
 Course Code: ECON 6344 Section: 501 Course Name: Transfer Pricing
 Number of participants 0 Reading List name ECON 6344
 Demanded for 2 courses with overall 0 participants.

Electronic Services
 No records were found.

Digital Services
 No records were found.

Physical Services

1 - 1 of 1 Records Columns Tools

Library	Location	Call Number	No. of Items	Available	Actions
Eugene McDermott Library	Stacks	HD2753.N55 E34 1998	1	1	Actions

This Record In Other Lists Columns Tools

Course Code	Course Name	Section Id	Academic Department	Processing Department	Instructor	Start Date	End Date	Number Of Participa	Reading List Name	Reading List Status	Section Name	Citation Status	Actions
1 EPPS 6346	Qualitative Research Methods	001	Economic, Political & Policy Sciences	Course Unit	Alexander, Bobby	08/10/...	12/18/...	0	EPPS 6346	Being Prepared	Section name n/a	Being Prepared	Actions

Filter Requests By Record In Other Lists All

1 - 1 of 1 Records Tools

1 Taxing multinationals : transfer pricing and corporate income taxation in North America / Lorraine Eden.
 ID: 2221270137590001421
 Place in Queue: 1
 Pickup Location: Resource Sharing Library Request Date: 10/21/2015
 Call Number: HD2753.N55 E34 1998 - Request: 2221270137590001421

Manage Resource Options Page

The following fields appear on this page:

Manage Resource Options Page Fields

Field	Description
Title	
Author	
ISBN (or ISSN)	
Place of Publication	
Chapter	
Pages	
Additional Person Name	An additional contact, if any
Year	

Field	Description
Edition	
Call Number	
Note	A public note, if any
Alerts	Any alerts on the citation, if any
<i>Course Details</i>	
Course Code	
Section	The course section
Course Name	
Number of Participants	The number of participants in this course
Reading List Name	
Demand for X courses with overall Y participants	The number of participants in all courses in which this citation appears
<i>Electronic Services – Electronic fulfillment information for the citation</i>	
<i>Digital Services – Digital fulfillment information for the citation</i>	
<i>Physical Services – Physical fulfillment information for this citation. Available actions for each location include View Items, Request, and Update Move Expiry. See below the table for details.</i>	
<i>This Record in Other Lists – Information about the citation as it appears in other reading lists. Available actions for each location include View and Place Request. See below the table for details. For each other reading list, the following fields appear for the citation:</i>	
Course Code	Course code of the other reading list
Course Name	
Section Id	The course section
Academic Department	
Processing Department	
Instructor	The instructor who created the reading list
Start Date	The start date for this course

Field	Description
End Date	The end date for this course
Number of Participants	The number of participants in this course
Reading List Name	
Reading List Status	
Section Name	The reading list section
Citation Status	

At the bottom of the page you can view existing requests for this citation. Some requests are specific to a reading list. Select the reading list from Filter Requests By Records in Other Lists to view only requests for that reading list. For more information about the fields and actions in this section, see [Managing Requests and Work Orders](#).

The following actions are available for physical services:

- View items – Select **Actions > View items**. The List of Items page appears.

List of Items Page

For more information about the List of Items page, see [Using the List of Items](#).

- Create a request – Select **Actions > Request**, or click **Place Request**. The Create Request page appears (see [Create Request Page](#)). Select a request type (as described in [Creating a Request](#)) and click **Submit**.
- Update the item's due back date so that it matches the due back date of the reading list (when the reading list's due back date is later than that of the item) – Select **Actions > Update move expiry**.

The following actions are available for citations that also appear in other reading lists:


- View the other reading list – Select **Actions > View**. The other reading list appears.
- Create a request for the other reading list – Select **Actions > Place Request**. The Create Request page appears (see [Create Request Page](#)). Select a request type (as described in [Creating a Request](#)) and click **Submit**.

Attaching Citation Attributes to Citations

To configure the available citation attributes, see [Configuring Citation Attribute Types](#), [Configuring Citation Attributes](#), and [Mapping Citation Attributes to Citation Attributes Types](#).

To attach citation attributes to citations:

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the **Citations** tab, click **Edit** beneath a citation. The Edit Reading List Citation page appears.

 Edit Reading List Citation

Reading List Information

Reading List Code: AA395 HI352 IR394 Reading List Name: Heywood, Linda AA395 HI352 IR394 Reading List Owners: Heywood, Linda

Reading List Status: Complete

Resource Information

Title *

Author

Author Initials

Edition

ISBN

LCCN

OCLC Number

Publisher

Publication Date

Place of Publication

Additional Person Name

Source

Series Title Number

Call Number

Note

Volume

Part

Chapter

Pages

Citation Parameters

Copyrights Status

Secondary citation type

Quick Add

Citation Attributes Types

Citation Attributes

Edit Reading List Citation Page

- In the **Quick Add** section at the bottom of the Citation tab, select a citation attribute type and the citation attribute you want to map, and click **Add Citation Attribute**. The selected values appear in a table at the bottom of the page.

← Citation Attributes

+ Quick Add

Citation Attributes Types

Requested format

▼

Citation Attributes

▼

Add citation attribute

	Citation Attributes Types	Citation Attributes
1	Requested format	DVD

Reading List – Added Citation Attribute

3. Click **Save**. The added citation attribute appears in the reading list information on the Edit Reading List page.

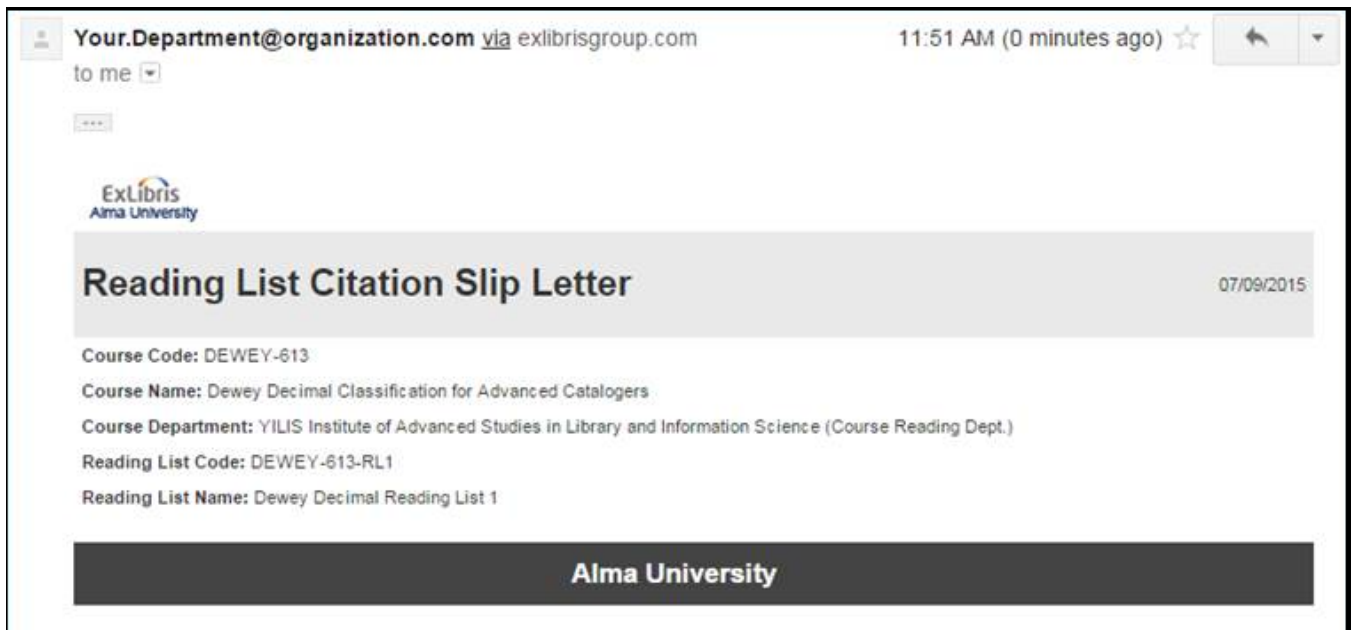
Printing Slips for Citations or Generating a Citation Print Slip Report

If the inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by printing a slip for the citations. On the Edit Reading List page ([Fulfillment > Course Reserves > Reading Lists](#); click the reading list) in the **Citations** tab:

- Click **Print Slip** beneath a citation
- Select one or more citations and click **Print Slip** at the top or bottom of the page. A print slip is generated for each citation.

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Reading List Citation Print Slip

For information about the print slip, see the **Ful Citation Slip Letter** in [Configuring Alma Letters](#).

You can also generate a print slip report that is sent to a printer or email address, or can be downloaded to a local machine. The report is an Excel file that contains the citations and their information, including Title, Author, Location, Call Number, ISBN/ISSN, Edition, Imprint, Availability, Electronic Availability, and Digital Availability.

To generate an Excel print slip report for citations:

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the **Citations** tab, select the citations and click **Print Slip Report**. The Print Slip Report dialog box appears.

Manage Citations Print Slip Report Dialog Box

2. Select whether to send the report by email (**Email** or **User**) or to a printer (**Printer**).
3. Select the destination:

- If sending by email, enter the email address in the **Email** field or the Alma user in the **User** field.
 - If sending to the printer, select the printer in the **Printer** field.
4. Optionally download the report by clicking **Download**.
 5. To send the report to the selected destination, click **Send**.