Ex Libris Confidential

ExLibris The bridge to knowledge

CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

TRADEMARKS

"Ex Libris," the Ex Libris Bridge to Knowledge, Primo, Aleph, Voyager, SFX, MetaLib, Verde, DigiTool, Rosetta, bX, URM, Alma, and other marks are trademarks or registered trademarks of Ex Libris Ltd. or its affiliates.

The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32, Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc.
Google is a registered trademark of Google, Inc.

Copyright Ex Libris Limited, 2015. All rights reserved.
Document updated: August 2015

Web address: http://www.exlibrisgroup.com

Table of Contents

1	**Alma August 2015 Release Highlights**	**5**
	Resource Management	5
	Fulfillment	5
	Resource Sharing	6
	Administration	6
	Collaborative Networks and Multicampus Institutions	6
	Analytics	7
2	**Data Services**	**8**
	New Electronic Collections Added to the Alma CKB	8
3	**Alma Show Me How and Videos**	**12**
	Alma Show Me How – August	12
	Alma Videos – August	13
4	**Particular Issues to Note**	**14**
5	**Acquisitions**	**15**
6	**Resource Management**	**16**
	Automatically Uploading Elsevier Electronic Holdings	16
	Creating UNIMARC/KORMARC Bibliographic Records with Quick Cataloging	19
	Customizing the Results Tab for Staff Searches	24
	Customizing the Location Displayed in Search Results	27
	Publishing Holdings to KERIS	30
	Extension Packs for MARC-Based Profiles	35
	Other Resource Management Enhancements	39
7	**Fulfillment**	**43**
	Improved Dematic ASRS Inventory Export Job Report	43
	Copyright Compliance Tracking	45
	Other Fulfillment Enhancements	47
8	**Resource Sharing**	**51**

Viewing Local Resources on a Borrowing Request 51
Managing Brokers' Digital Requests 53
9 Administration 55
Limiting User Information Exposed in User Pop-Ups 55
Central Authentication Services (CAS) Support 57
Other Administration Enhancements 59
10 Collaborative Networks and Multicampus Institutions 61
Enhance Z39.50 Results with Collaborative Network Member Holdings 61
Other Collaborative Network Enhancements 62
11 Analytics 63
Physical Items Subject Area Enhanced with New Fields 63
Publishing Identifier Number Available in Analytics 65
OBI Upgraded to Latest Version 68
Other Analytics Enhancements 68
12 Alma APIs 69
13 Known Issues 70
Fixed Issues 70

Alma August 2015 Release Highlights

Resource Management

- **Automatically Uploading Elsevier Electronic Holdings** – Alma now enables you to automatically update Elsevier electronic holdings by retrieving the institution-specific Elsevier electronic holdings and updating the Elsevier collection content accordingly. This replaces the existing multiple step manual workflow in which the institution contacts Elsevier for their specific institutional holdings, converts the provided feed to meet the Portfolio Loader format, and then uploads the holdings using the Portfolio Loader.
- **Customizing the Results Tab for Staff Searches** – For some kinds of repository searches, the user might wish to view the results in the Community or Network Zones by default, rather than the Institution Zone. Alma now provides the ability to set the default tab that is selected on the search results page. The default applies to searches from the Advanced Search page or the persistent search box. The selected tab is retained when you perform a search from the repository search results page.
- **Customizing the Location Displayed in Search Results** – Alma now provides the ability to customize whether the library and location appear in the repository search results as codes, names, or both. Until now, only the library and location codes appeared in the search results; this remains the default.
- **Extension Packs for MARC-Based Profiles** – Alma has enabled extension packs that extend the existing MARC-based bibliographic, holdings, and authority profiles with additional fields, subfields, and indicator values, repeating/nonrepeating and mandatory/non-mandatory specifications and URLs for online help. With these extension packs, institutions can easily load and use regional adaptations to the MARC standard. Note that we are currently creating a set of extension packs and will announce these in the monthly Alma release notes when they become available.

Fulfillment

- **Copyright Compliance Tracking** – Alma now provides a means of recording intended usage information on library digitization requests and reading list citations. The information is retained in the system, and will be reportable in Analytics in future releases.

Resource Sharing

- **Viewing Local Resources on a Borrowing Request** – If local resources exist but a borrower creates a resource sharing request, Alma now enables you to view the local resources for the request. Viewing the local resources can be done while creating the resource sharing request, or after the request has already been created. In either case, the operator may decide to place a local hold request on the matching local resource. If this is done within the process of creating the resource sharing request, the resource sharing request will not be created.
- **Managing Brokers' Digital Requests** – The broker-based resource sharing workflow now supports a digital workflow in addition to the physical workflow.

Administration

- **Central Authentication Services (CAS) Support** – CAS is a single sign-on protocol for the web. It permits a user to provide user credentials, such as user ID and password, only one time to access multiple applications. Web applications, including Alma, that use the CAS protocol can be given user access without needing to enter the user's security credentials twice.
- **Limiting User Information Exposed in User Pop-Ups** – User privacy is now enhanced by the ability to configure which elements of user information are revealed in patron contact pop-up boxes. The configuration process distinguishes between Staff and Public users.

Collaborative Networks and Multicampus Institutions

- **Enhance Z39.50 Results with Collaborative Network Member Holdings** – Alma now enables you to include the ownership of holdings by member institutions in a collaborative network when responding to a Z39.50 request. The returned information includes the institution, the bibliographic record (MMS ID), and the format (physical, electronic, or digital). Only requests to the Network Zone include the ownership of member institutions. An additional field was added to the **Actions** tab of the Z39.50 integration profile for this purpose.

Analytics

- **Physical Items Subject Area Enhanced with New Fields** - In order to expand the possibilities for the creation of various reports related to physical items, a number of additional fields have been added to the Physical Item Details dimension of the Physical Items subject area.
- **Publishing Identifier Number Available in Analytics** - The publishing identifier number for records is now available when creating Analytics reports. You can use this identifier to reconcile Analytics data, which has only MMS IDs, with the number from record IDs supplied to Primo from Alma. You can then pass the results to a reading list system in order to make relegation and capacity decisions. This number is essential for reports on Fulfillment activity where this number is the only common ID between the two systems.

Data Services

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

Note: The Community Zone is now enriched with bibliographic records received from the Harvard Library Bibliographic Dataset, adding approximately 120,000 full bibliographic records to the Community Zone.

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone during the period of 5 July through 26 July 2015:

- BIBSAM Thieme eBook Library 2014-2016
- CCC Get It Now Advanstar Communications
- CCC Get It Now American Pharmacists Association
- CCC Get It Now British Editorial Society of Bone and Joint Surgery
- CCC Get It Now Canadian Journal of Urology
- CCC Get It Now Geological Society of America
- CCC Get It Now RCN Publishing Company
- CCC Get It Now Royal College of Psychiatrists
- CCC Get It Now Sagamore Publishing
- CCC Get It Now Symposium Journals
- Eduserv Emerald Education 2015-2017
- Eduserv Emerald Engineering 2015-2017
- Eduserv Emerald Health And Social Care 2015-2017
- Eduserv Emerald Library Studies 2015-2017
- Eduserv Emerald Management 2015-2017
- Eduserv Emerald Management Accounting Finance And Economics Collection 2015-2017
- Eduserv Emerald Management Business Management And Strategy Collection 2015-2017
- Eduserv Emerald Management Human Resources Learning And Organization Studies Collection 2015-2017

- Eduserv Emerald Management Information And Knowledge Management Collection 2015-2017
- Eduserv Emerald Management Marketing Collection 2015-2017
- Eduserv Emerald Management Operations Logistics And Quality Collection 2015-2017
- Eduserv Emerald Management Plus 2015-2017
- Eduserv Emerald Management Premier Collection 2015-2017
- Eduserv Emerald Management Property Management And Built Environment Collection 2015-2017
- Eduserv Emerald Management Public Policy And Environmental Management Collection 2015-2017
- Eduserv Emerald Management Tourism And Hospitality Collection 2015-2017
- JISC Collections Cambridge University Press Full Collection 2015
- JISC Collections Cambridge University Press Humanities And Social Sciences 2015
- JISC Collections Cambridge University Press Science Technology And Medicine 2015
- JISC Collections JSTOR Arts And Sciences I 2012-2015
- JISC Collections JSTOR Arts And Sciences II 2012-2015
- JISC Collections JSTOR Arts And Sciences III 2012-2015
- JISC Collections JSTOR Arts And Sciences IV 2012-2015
- JISC Collections JSTOR Arts And Sciences IX 2012-2015
- JISC Collections JSTOR Arts And Sciences V 2012-2015
- JISC Collections JSTOR Arts And Sciences VI 2012-2015
- JISC Collections JSTOR Arts And Sciences VII 2012-2015
- JISC Collections JSTOR Arts And Sciences VIII 2012-2015
- JISC Collections JSTOR Arts And Sciences X 2012-2015
- JISC Collections JSTOR Arts And Sciences XI 2012-2015
- JISC Collections JSTOR Arts And Sciences XII 2012-2015
- JISC Collections JSTOR Arts And Sciences XIII 2012-2015
- JISC Collections JSTOR Arts And Sciences XIV 2012-2015
- JISC Collections JSTOR Biological Sciences 2012-2015
- JISC Collections JSTOR Business And Economics 2012-2015

- JISC Collections JSTOR Business I 2012-2015
- JISC Collections JSTOR Business II 2012-2015
- JISC Collections JSTOR Business III 2012-2015
- JISC Collections JSTOR Business IV 2012-2015
- JISC Collections JSTOR Current Scholarship Program 2015
- JISC Collections JSTOR Ecology And Botany 2012-2015
- JISC Collections JSTOR Ecology And Botany II 2012-2015
- JISC Collections JSTOR Health And General Sciences 2012-2015
- JISC Collections JSTOR Hebrew 2012-2015
- JISC Collections JSTOR Jewish Studies 2012-2015
- JISC Collections JSTOR Language And Literature 2012-2015
- JISC Collections JSTOR Life Sciences 2012-2015
- JISC Collections JSTOR Mathematics And Statistics 2012-2015
- JISC Collections JSTOR Music 2012-2015
- JISC Collections JSTOR Religion And Theology 2012-2015
- JISC Collections Karger Biosciences Journal Archive Collection
- JISC Collections Karger Full Journal Archive Collection
- JISC Collections Karger Internal Medicine I Archive Collection
- JISC Collections Karger Internal Medicine Ii Archive Collection
- JISC Collections Karger Medical And Scientific Full Collection 2015
- JISC Collections Karger Neurology Neurobiology Neurosurgery Journal Archive
- JISC Collections Karger ORL Ophthalmology Dental Medicine And Psychiatry Archive
- JISC Collections Oxford University Press Economics And Finance Collection 2015
- JISC Collections Oxford University Press Humanities And Social Sciences Collection 2015
- JISC Collections Oxford University Press Humanities Collection 2015
- JISC Collections Oxford University Press Journals Collection Excluding New Titles 2015
- JISC Collections Oxford University Press Journals Collection Including 25 New Titles 2015
- JISC Collections Oxford University Press Law Collection 2015
- JISC Collections Oxford University Press Life Sciences Collection 2015

- JISC Collections Oxford University Press Mathematics And Physical Science Collection 2015
- JISC Collections Oxford University Press Medicine Collection 2015
- JISC Collections Oxford University Press Science Technology And Medicine Collection 2015
- JISC Collections Oxford University Press Social Sciences Collection 2015
- JISC Collections Taylor Francis Fresh Collection 2015-2017
- JISC Collections Taylor Francis Full Collection 2015-2017
- JISC Collections Taylor Francis Science And Technology Collection 2015-2017
- JISC Collections Taylor Francis Social Science And Humanities Collection 2015-2017
- John Benjamins Books
- John Benjamins Journals
- Norart
- ProQuest PAO Periodicals Archive Online Foundation
- RCNi Journals
- Thieme E-Book Library- Medical Collection

Note: No new external resources were added for the August release.

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the August 2015 release of Alma.

Alma Show Me How – August

Description

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

Step-by-Step Instructions

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

To access Show Me How:

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

   The How Can We Assist You? pop-up window appears.

2. Select one of the processes in order to start the prompted step-by-step instructions.

   For the August release, the following Show Me How scenarios are available:

   - Search Results: Display Library and Location Names
   - Set Default Tabs for Different Search Types

   The following pop-ups are also available:

   - **New: View Local Resources of a New Borrowing Request** (Fulfillment > Resource Sharing > Borrowing Requests; add a borrowing request manually, fill in the request details, and click Save)
   - **New: View Local Resources of an Existing Borrowing Request** (Fulfillment > Resource Sharing > Borrowing Requests)

Alma Videos – August

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

- Automatically Uploading Elsevier Electronic Holdings
- Search Display Customizations
- Viewing Local Resources on a Borrowing Request

Particular Issues to Note

Please note the following issues in this release:

- As part of the agile development of Alma, infrastructural and technical changes have been implemented in the August release that will allow for the implementation and use of the new Analytics Link Resolver subject area in the September release. Note that in the September release, current link resolver data will be available. In a future release, retroactive (historical) data will also be available.
- French will be available for the staff Alma user interface as of the August hot fix on the 9th of August. (It has already been available for the patron-facing user interface—that is, for notifications, self-check machine messages, Primo Get It, View It, and My Account.) To enable working with Alma in French, you must activate the French language for staff in the Institution Languages mapping table (**Administration > General Configuration > Configuration Menu > General Configuration > Institution Languages**) and click **Save**.
- Previously, when saving a record in the MD Editor without making any changes, the record's update date was changed and the record was subsequently republished. This unexpected behavior was fixed and such records are no longer republished.

Acquisitions

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

- In addition to users with the **Vendor Manager** role, now users with the **Purchase Operator/Purchase Manager** roles can communicate with vendors in the **Communications** tab on the Vendor Details page:
  - While editing a vendor – Select **Acquisitions > Acquisitions Infrastructure > Vendors**, select **Actions > Edit** on a vendor line, and click **Start Communication** in the Communications tab.
  - When adding a vendor – Select **Acquisitions > Acquisitions Infrastructure > Vendors**, select **Actions > Edit** on a vendor line, click **Add Vendor**, add an account.
- Vendor account contact information can now be deleted (Vendor Account Details, **Contact Information** tab)
- The PO line creation date is now included when the PO line is exported (**Tools > Export to Excel**).

Resource Management

The following sections describe the functions provided for the Resource Management functional area in this release of Alma.

Automatically Uploading Elsevier Electronic Holdings

Description

Alma now enables you to update Elsevier electronic holdings by automatically retrieving the institution-specific holdings and updating the Elsevier collection content.

This new functionality replaces the existing manual, multi-step workflow of 1) contacting Elsevier for your specific institutional holdings, 2) converting the provided feed to meet the Portfolio Loader format, and 3) uploading the holdings using the Portfolio Loader.

This feature ensures that your institution-specific electronic holdings for Elsevier collections are up-to-date and reflect your purchases.

To support this new functionality, two new Elsevier collections were added to the Community Zone: **Elsevier ServiceDirect Books Complete** and **Elsevier ServiceDirect Journals Complete**. The new collections entirely replace any old Elsevier collections.

Step-by-Step Instructions

The following role can activate the new Elsevier collections:

- Electronic Inventory Operator

The following role can configure automatic uploading of electronic holdings for Elsevier:

- General System Administrator

To configure the new Elsevier collections:

1. Activate the collections **Elsevier ServiceDirect Books Complete** and **Elsevier ServiceDirect Journals Complete**. For more information, see *Adding a Local Electronic Collection* in the *Alma Resource Management Guide* or the Alma Online Help.
2. Run the integration profile, as described in the following procedure.
3. After the profile runs, test the holdings:
    - Check the contents of the electronic collections to ensure that they reflect your institutional holdings.
    - Test access to selected portfolios to ensure that access is correct.

4 When you are satisfied with the above results, if you have holdings in other Elsevier electronic collections:

   a Move licenses and PO lines from the old collections/portfolios to the new holdings.

     For licenses and PO lines on the collection level, change these on the Electronic Collection Editor page in the **General Information** tab. For licenses and PO lines on the portfolio level, change these in bulk by exporting the existing portfolios to a batch file, making your changes, and then reimporting the file.

   b Deactivate the portfolios in the old collections. For more information, see **Modifying, Deactivating, or Deleting an Electronic Collection** in the *Alma Resource Management Guide* or the Alma Online Help.

To configure automatic uploading of electronic holdings for Elsevier:

1 Obtain an institution token from Elsevier. You can create an Elsevier token using the Elsevier admin tool. For more information, see the PDF http://www.elsevier.com/__data/assets/pdf_file/0007/92815/SD_EHR_QRG_2014.pdf or contact the Elsevier helpdesk for assistance.

2 Open the External System wizard for configuring an integration profile (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**; click **Add Integration Profile**).

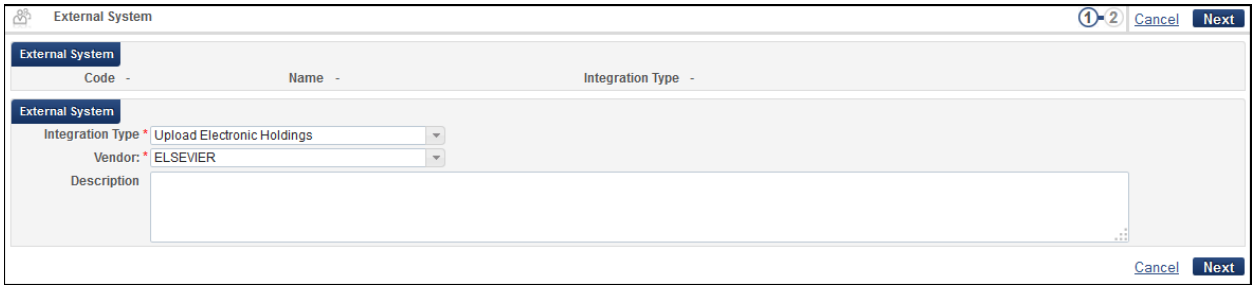

Figure 1 - Configuring Upload Electronic Holdings Integration Profile, Part 1

3 In the **Integration type** field, select **Upload Electronic Holdings**. The other fields on the page change to reflect your selection.

4 In the **Vendor** field, select **ELSEVIER**.

5 Add an optional description and click **Next**. The second page of the wizard appears.

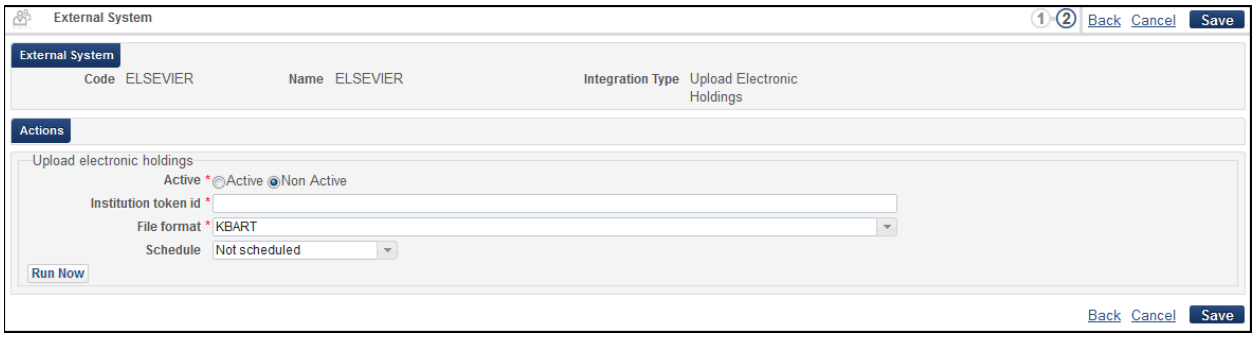

Figure 2 - Configuring Upload Electronic Holdings Integration Profile, Part 2

6 Select **Active** to activate the profile.

7 In the **Institution token ID** field, enter the institution token you obtained in step 1.

8 Select the file format (**KBART** is currently the only option).

9 Schedule the profile to run either every Sunday at 7:00 AM or on the second of every month.

To run the profile immediately, click **Run Now**.

10 Click **Save**. The integration profile is scheduled and appears in the list of integration profiles (below) and the list of scheduled jobs (see **Viewing Scheduled Jobs** in the *Alma Administration Guide* or the Alma Online Help. The profile runs as scheduled to keep your Elsevier holdings up-to-date.

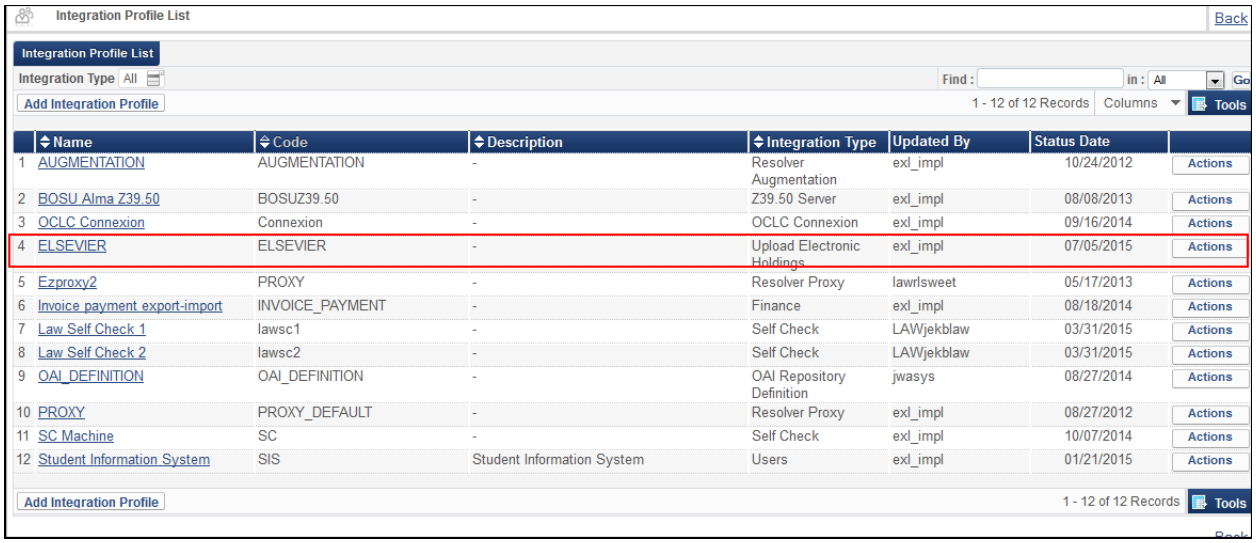

Figure 3 - Upload Electronic Holdings Integration Profile in Profile List

Creating UNIMARC/KORMARC Bibliographic Records with Quick Cataloging

Description

Alma now supports creating UNIMARC or KORMARC bibliographic records as part of quick cataloging in several workflows in Alma, including:

- Manually adding a physical item
- Creating a new item for loans
- Adding a brief item to a reading list
- Creating a resource sharing borrowing request
- Creating a local portfolio
- Adding a top-level collection
- Running the Portfolio Loader

To support this feature, a new field **Record format** was added to the quick cataloging forms in the above locations. In some cases, the default record format is used.

Step-by-Step Instructions

Note: To work with UNIMARC and KORMARC records in Alma, Ex Libris must add support for UNIMARC and KORMARC formats to your **Active Registry** table. Inform Ex Libris which formats to add and which to designate as the preferred (default) format.

To create a UNIMARC or KORMARC record when manually adding a physical item:

You must have the following role: Physical Inventory Operator.

When adding a physical item (**Resource Management > Create Inventory > Add Physical Item**), select the record format in the **Record format** field. For more information, see **Adding a New Book or Journal Article** in the *Alma Resource Management Guide* or the Alma Online Help.

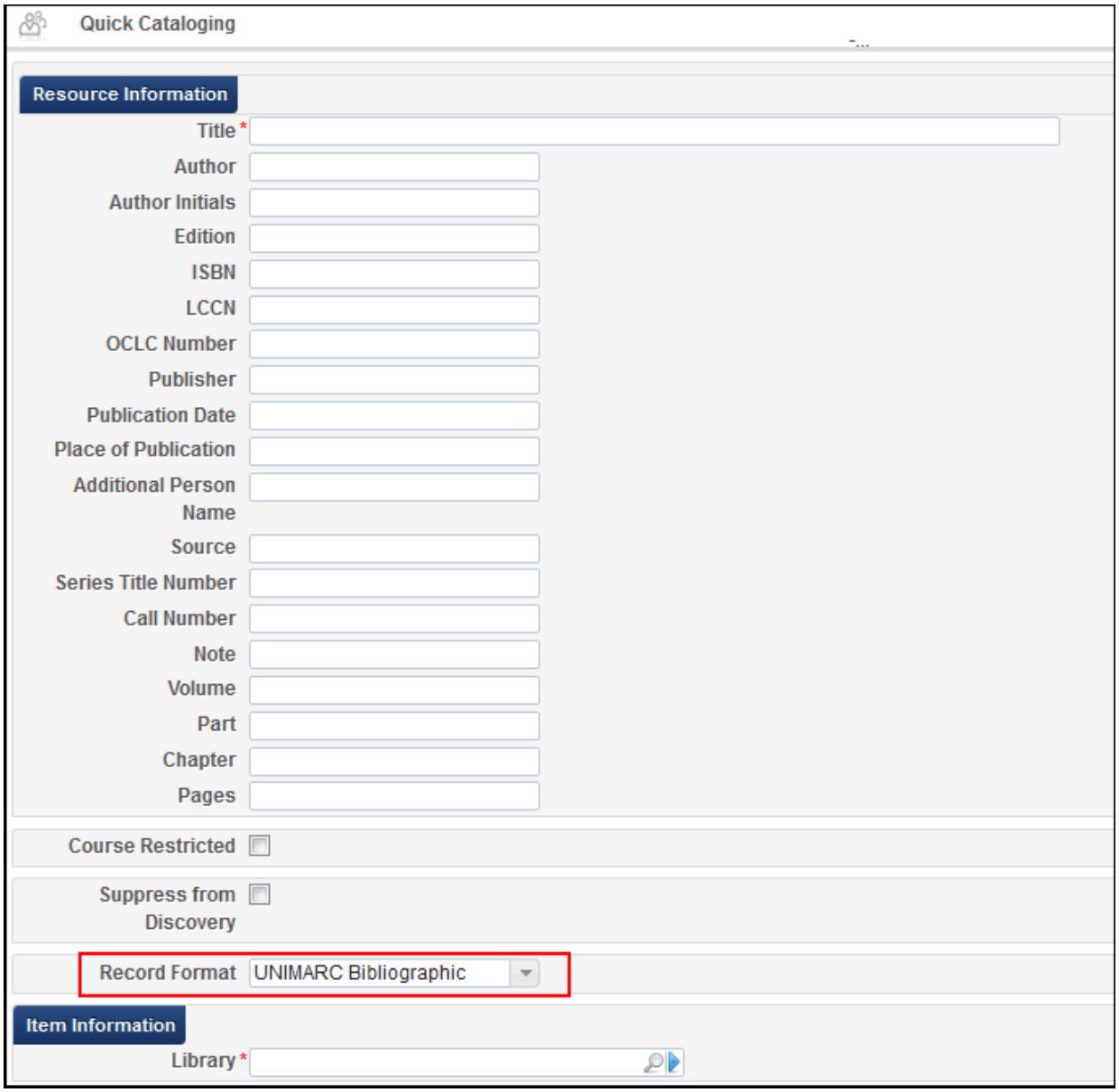

Figure 4 - Quick Cataloging with Record Format Field

To create a UNIMARC or KORMARC record when creating a new item for loans:

You must have one of the following roles: Circulation Desk Manager, Circulation Desk Operator.

When creating a new item during a loan (**Fulfillment > Checkout/Check-in > Manage Patron Services**; enter an ID, click **Go**, select the **Loans** tab and click **Create Item**), select the record format in the **Record format** field. For more information, see **To create a new item to be entered into the repository** in the *Alma Fulfillment Guide* or the Alma Online Help.

See Figure 4.

To create a UNIMARC or KORMARC record when adding a brief item to a reading list:

You must have one of the following roles: Course Reserves Operator, Course Reserves Manager, Fulfillment Services Operator, Fulfillment Services Manager.

When adding a brief record while editing a reading list (**Fulfillment > Course Reserves > Reading Lists**; select **Actions > Work** and click **Add Brief**), select the record format in the **Record format** field. For more information, see **To add a brief record** in the *Alma Fulfillment Guide* or the Alma Online Help.

See Figure 4.

To create a UNIMARC or KORMARC record when creating a resource sharing borrowing request:

You must have one of the following roles: Fulfillment Services Operator, Fulfillment Services Manager.

When manually adding a borrowing request(**Fulfillment > Resource Sharing > Borrowing Requests**; select **Add > Manually**), the record is added in the default record format specified in the **Active Registry** table. For more information, see **Manually Adding a Request** in the *Alma Fulfillment Guide* or the Alma Online Help.

There were no changes to the UI for this workflow.

To create a UNIMARC or KORMARC record when creating a local portfolio:

You must have the following role: Electronic Inventory Operator

When adding a local portfolio (**Resource Management > Create Inventory > Add Local Portfolio**), select the record format in the **Record format** field. For more information, see **Adding a Standalone Portfolio** in the *Alma Resource Management Guide* or the Alma Online Help.

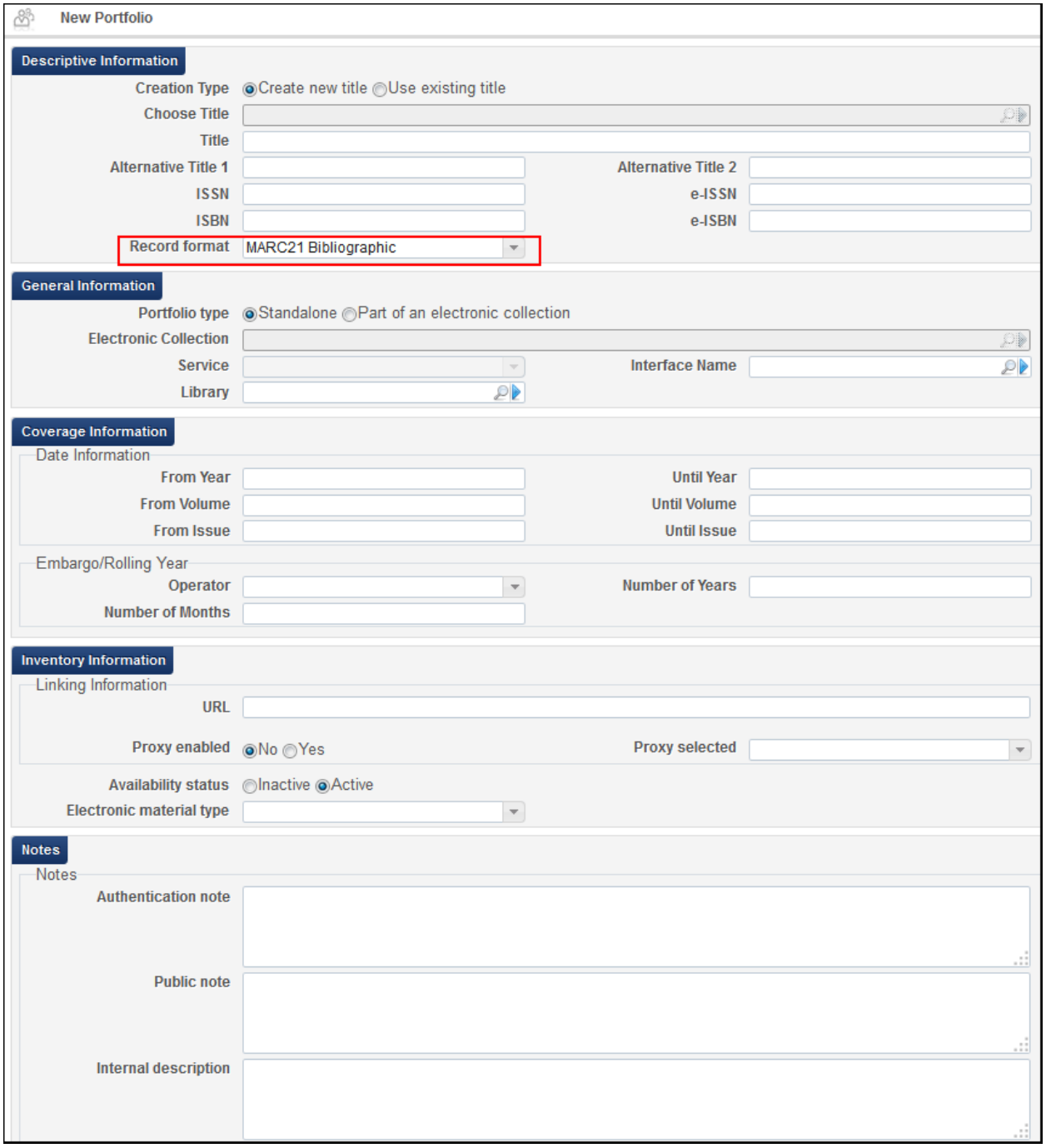

Figure 5 - New Portfolio with Record Format Field

To add a top-level collection of UNIMARC or KORMARC records:

You must have the following role: Collection Inventory Operator

When adding a top-level collection (**Resource Management > Create Inventory > Add Top Level Collection**), select the record format in the **Collection record format** field. For more

information, see **Adding a Top Level Collection** in the *Alma Resource Management Guide* or the Alma Online Help.

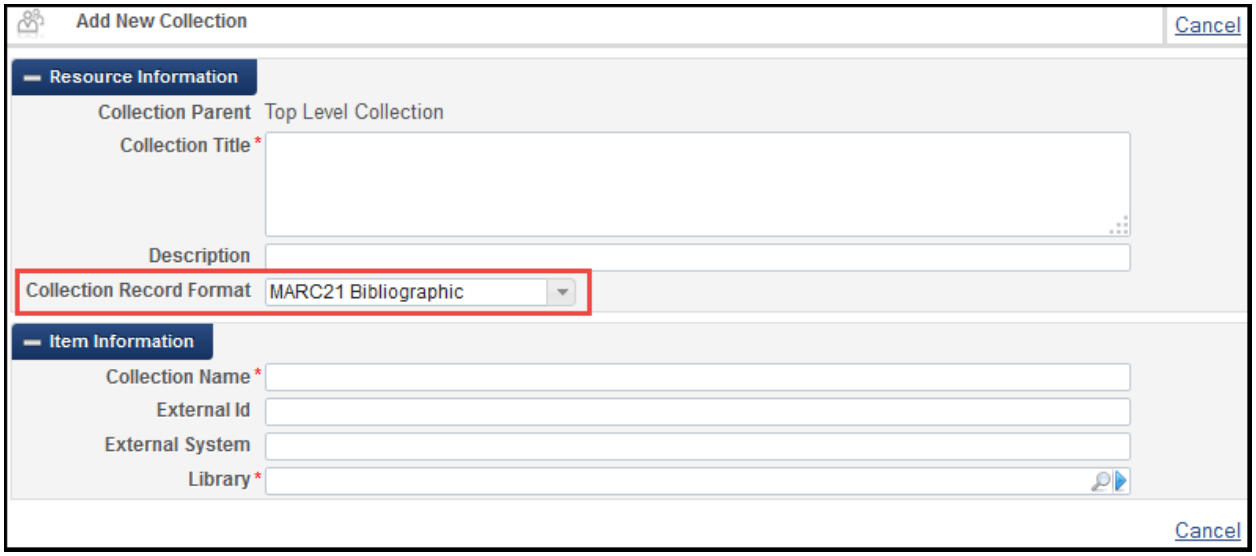

Figure 6 - Add New Collection with Collection Record Format Field

To import records with the Portfolio Loader in UNIMARC or KORMARC format:

You must have the following role: Electronic Inventory Operator

When configuring the Portfolio Loader while modifying an electronic service (search for an electronic service, click **Edit Service**, select the **Portfolios** tab, click **Load Portfolios**), select the record format in the **Record format** field. For more information, see **Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)** in the *Alma Resource Management Guide* or the Alma Online Help.

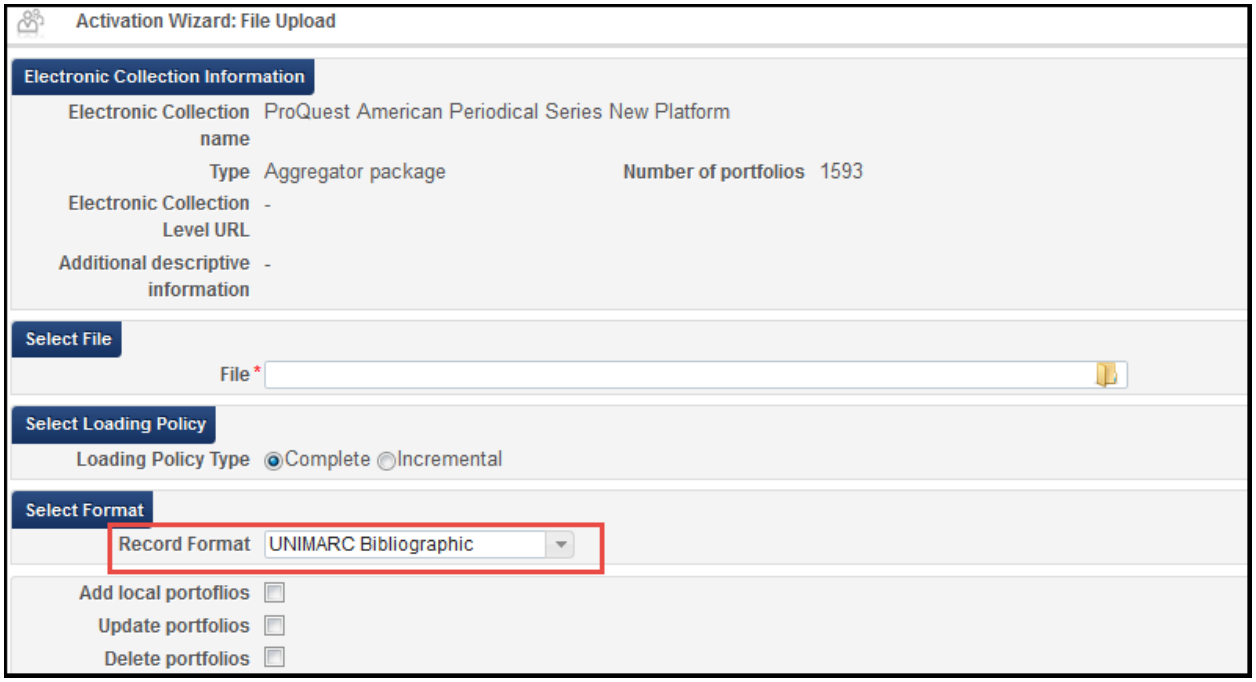

Figure 7 - Activation Wizard: File Upload with New Record Format Field

Customizing the Results Tab for Staff Searches

Description

In order to improve the staff search experience, Alma now enables you to define the default search tab (Network, Institution, Community) for some types of staff searches.

For some kinds of searches, it is likely that the user would want to view the results in the Community or Network Zones by default, rather than the Institution Zone (local repository). For example, collaborative network member staff may want All Title searches to display by default the Network Zone search results and inventory searches to display by default the Institution Zone results. As another example, libraries may want to direct the default search for electronic collections and portfolios to the Community Zone.

The default applies to searches from the Advanced Search page or the persistent search box. The selected tab is retained when you perform a search from the repository search results page.

Step-by-Step Instructions

The following roles can customize the selected tab for different search results:

- Catalog Administrator
- General System Administrator

To customize the selected tab for different search results:

On the Default Repository Search page (**Resource Management > Resource Configuration > Configuration Menu > General > Default Repository Search**), select the default tab (**Institution**, **Community**, or **Network**) that will be selected for each of the following search types and click **Save**.

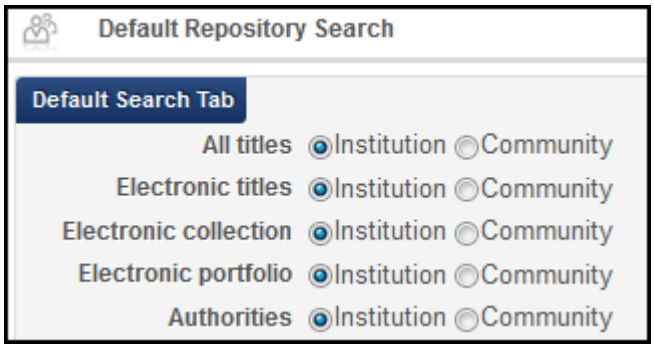

Figure 8 - Default Repository Search Page

- All titles
- Electronic titles
- Electronic collection
- Electronic portfolio
- Authorities

Note: The option **Network** is available only for institutions within a collaborative network.

For example, by default, a search for **Electronic Collections** returns results in the Institution Zone:

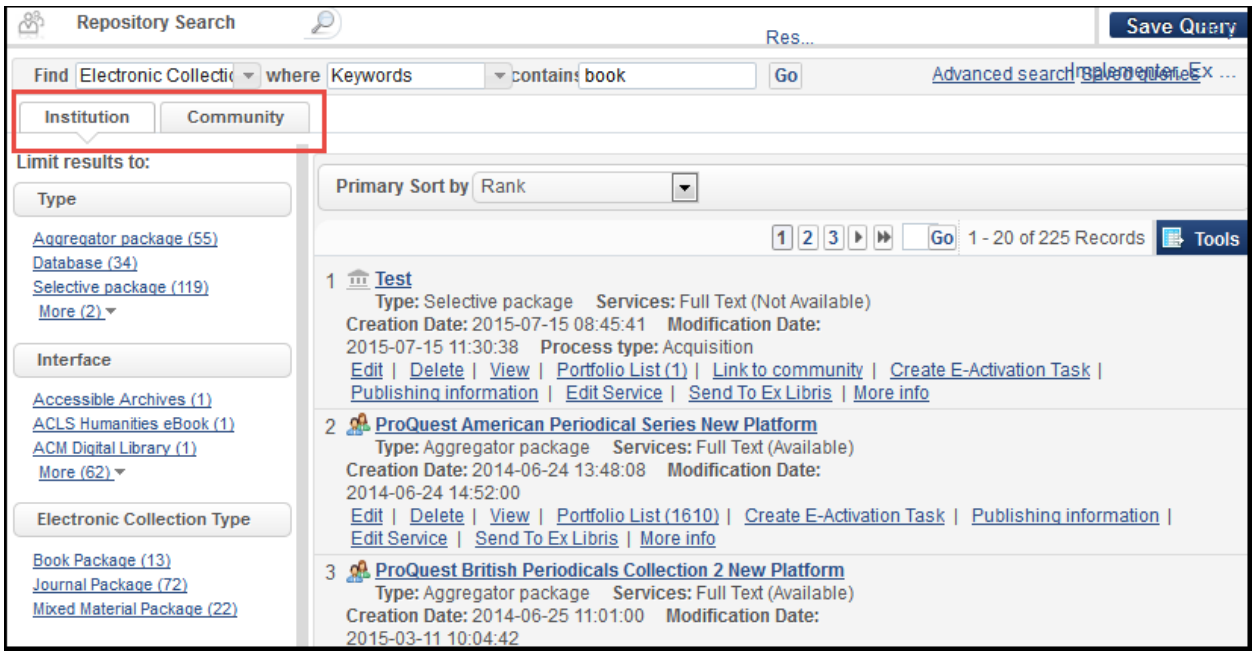

Figure 9 - Results in the Institution Zone

After selecting **Community** for **Electronic Collections** on the Default Repository Search page, a search for **Electronic Collections** returns results in the Community Zone:

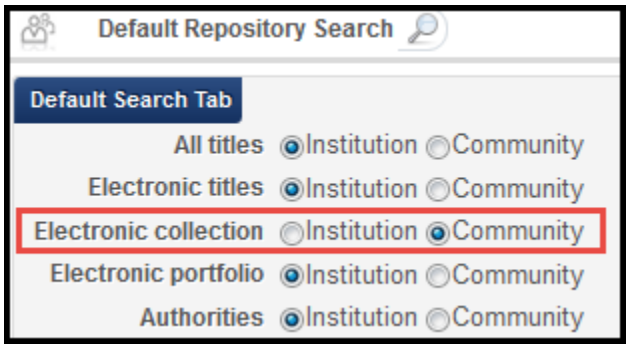

Figure 10 - Default Repository Search Page

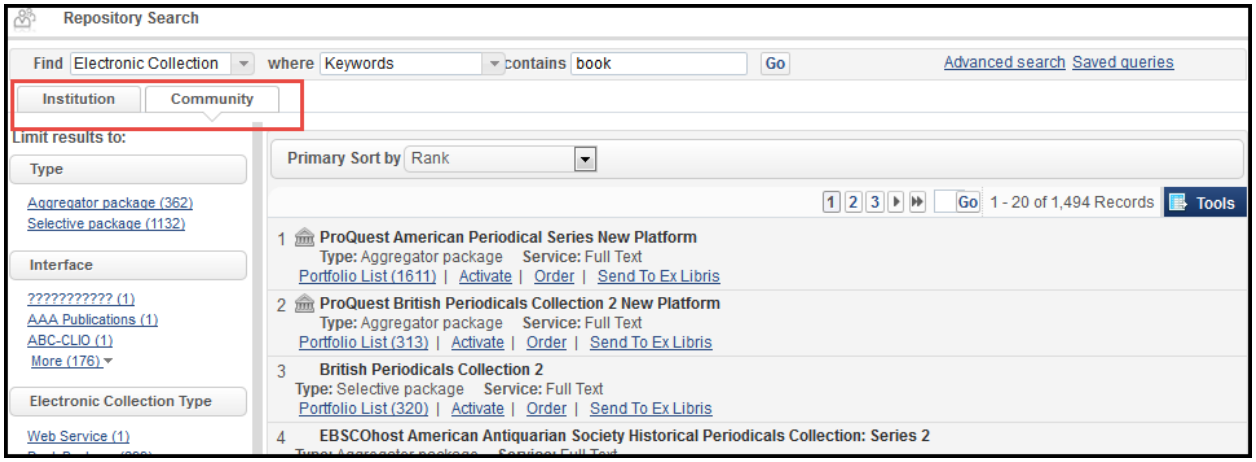

Figure 11 - Results in the Community Zone

Customizing the Location Displayed in Search Results

Description

Alma now provides the ability to customize whether the library and location appear in the search results as codes, names, or both. Until now, only the library and location codes appeared in the search results; this remains the default functionality.

Step-by-Step Instructions

The following roles can customize how libraries and locations appear in the search results:

- Catalog Administrator
- General System Administrator

To customize the selected tab for different search results:

On the Library/Location Display page (**Resource Management > Resource Configuration > Configuration Menu > General > Library/Location Display**), select one of the following options in the **Repository search results** field for how the library and location appear in the search results and click **Save**.

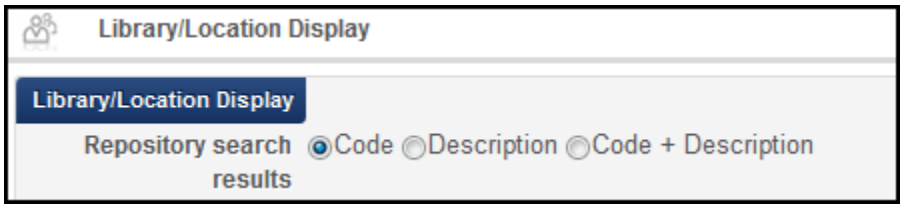

Figure 12 – Library/Location Display Page

- Code – The libraries and locations appear as `<library code>:<location code>`.
- Description – The libraries and locations appear as `<library name>:<location name>`.
- Code + Description – The libraries and locations appear as `<library code><tab><library name>:<location code><tab><location name>`.

Note that `library name` and `location name` appear in a tooltip when your hover your mouse over any of the above texts.

Results with the location code (only):

Figure 13 – Search with Library/Location Code

Results with the location description (name only):

The yellow book.
Journal (London : E Mathews & J Lane Vol. 1 (Apr. 1894)-v. 13 (Apr. 1897).)
ISSN: 2044-690X
Subject: Art nouveau Periodicals. -- Letterkunde. -- Engels. and others **Language:** English **Record number:** (CONSER) 05041105
Availability: Electronic version at ProQuest British Periodicals Collection 2 New Platform: Full Text
Edit | Order | Request | Document Delivery | Add to reading list | Portfolio List | View It | More info

The Chap-book.
Journal (Chicago : Stone and Kimball Vol. 1, no. 1 (May 15, 1894)-v. 9, no. 4 (July 1898))
Subject: Chicago, Ill. Periodicals. **Language:** English **Record number:** 1553885
Availability: Physical version at **Howard Gotlieb Archival Research Center: zW; AP2 .E94** V.5
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | Items | More info

The Indian book.
Book (Chicago : World Book-Childcraft International 1980.)
ISBN: 0716606801
Series: Childcraft annual ; 1980.
Subject: Indians of North America Juvenile literature. -- Indians of South America Juvenile literature. **Language:** English **Record number:** (OCoLC)6455839
Availability: Physical version at **Pickering Educational Resources Library: Juvenile Collection; E77.4 .I54 1980** (1 copy, 1 available)
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | Items | More info

The puzzle book.
Book (Chicago : World Book c1982.)
ISBN: 0716606828
Series: Childcraft annual ; 1982.
Subject: Puzzles. -- Literary recreations. **Language:** English **Record number:** (OCoLC)8800425
Availability: Physical version at **Pickering Educational Resources Library: Juvenile Collection; GV1493 .P89 1982** (1 copy, 1 available)
Electronic version at Online: Full Text
Edit | Order | Request | Document Delivery | Add to reading list | Portfolio List | Holdings | Items | View It | More info

The Blue book.
Journal (London [etc.] St James Press 1970-76.)
ISSN: 0067-9240
Subject: Biography 20th century. **Language:** English **Record number:** 1536593
Availability: Physical version at **Mugar: Reference X; DA 28 F70** 1976
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | More info

Figure 14 – Search with Library/Location Description

Results with the location code + description (name):

The yellow book.
Journal (London : E Mathews & J Lane Vol. 1 (Apr. 1894)-v. 13 (Apr. 1897).)
ISSN: 2044-690X
Subject: Art nouveau Periodicals. -- Letterkunde. -- Engels. and others Language: English Record number: (CONSER) 05041105
Availability: Electronic version at ProQuest British Periodicals Collection 2 New Platform: Full Text
Edit | Order | Request | Document Delivery | Add to reading list | Portfolio List | View It | More info

The Chap-book.
Journal (Chicago : Stone and Kimball Vol. 1, no. 1 (May 15, 1894)-v. 9, no. 4 (July 1898))
Subject: Chicago, Ill. Periodicals. Language: English Record number: 1553885
Availability: Physical version at SPE Howard Gotlieb Archival Research Center: botx zW; AP2 .E94 V.5
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | Items | More info

The Indian book.
Book (Chicago : World Book-Childcraft International 1980.)
ISBN: 0716606801
Series: Childcraft annual ; 1980.
Subject: Indians of North America Juvenile literature. -- Indians of South America Juvenile literature. Language: English Record number: (OCoLC)6455839
Availability: Physical version at PERL Pickering Educational Resources Library: bott Juvenile Collection; E77.4 I54 1980 (1 copy, 1 available)
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | Items | More info

The puzzle book.
Book (Chicago : World Book c1982.)
ISBN: 0716606828
Series: Childcraft annual ; 1982.
Subject: Puzzles. -- Literary recreations. Language: English Record number: (OCoLC)8800425
Availability: Physical version at PERL Pickering Educational Resources Library: bott Juvenile Collection; GV1493 .P89 1982 (1 copy, 1 available)
Electronic version at Online: Full Text
Edit | Order | Request | Document Delivery | Add to reading list | Portfolio List | Holdings | Items | View It | More info

The Blue book.
Journal (London [etc.] St James Press 1970-76.)
ISSN: 0067-9240
Subject: Biography 20th century. Language: English Record number: 1536593
Availability: Physical version at MUG Mugar: bosx Reference X; DA 28 F70 1976
Edit | Order | Request | Document Delivery | Add to reading list | Holdings | More info

Figure 15 – Search with Library/Location Code + Description

Publishing Holdings to KERIS

Description

Libraries in Korea can now work directly with the KERIS central catalog and automatically publish holdings to the KERIS central catalog on an ongoing basis. This will ensure that KERIS has timely and accurate holdings information for its centrally provided services.

Step-by-Step Instructions

The following roles can configure publishing profiles for KERIS:

- Catalog Administrator
- Repository Administrator
- General System Administrator

To configure KERIS parameters in a General publishing profile:

1 Open the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export section > Publishing Profiles**).

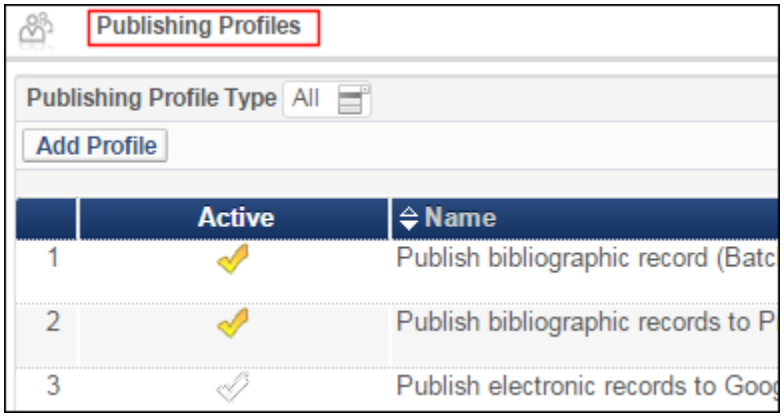

Figure 16 - Publishing Profiles Page

2 Click **Add Profile** and select **General Profile**. The Publishing Profile Details page appears.

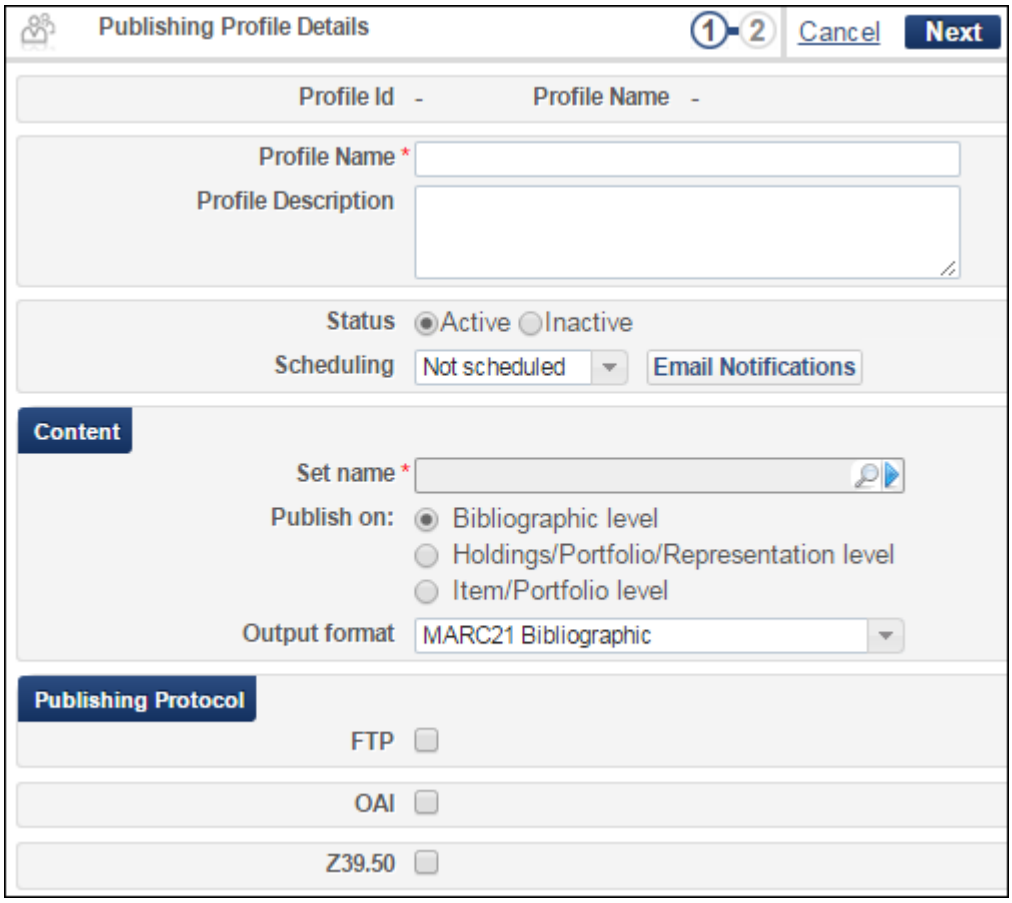

Figure 17 - Publishing Profile Details Page

3. Enter the publishing profile parameters to match your requirements. For publishing to KERIS:
   a. Depending on the type of records to be published, select **MARC21 Bibliographic** or **KORMARC Bibliographic** for the **Output format** parameter.
   b. Select **Z39.50** for the **Publishing Protocol** and enter the values that you identified/coordinated with KERIS for the following Z39.50 parameters:
      - Host
      - Port
      - Database Name
      - Group ID
      - User Name
      - Password
   c. See the Alma Online Help or the *Integrations with External Systems* guide for information regarding the remaining parameters.

Publishing Profile Details 1-2 Cancel Next

Profile Id - Profile Name -

Profile Name * KERIS Publishing Profile

Profile Description KERIS Publishing Profile

Status Active Inactive

Scheduling Not scheduled Email Notifications

Content

Set name * naousa

Publish on: Bibliographic level
Holdings/Portfolio/Representation level
Item/Portfolio level

Output format KORMARC Bibliographic

Publishing Protocol

FTP

OAI

Z39.50

Host * zserver.riss4u.net

Port * 9008

Database Name * UBIB

Group ID * SNUL

User Name * EXL

Password * ••••

Figure 18 - Publishing Profile Configuration Parameters Specific to KERIS

4 Click **Next**.

5 Complete the following sections using the Alma Online Help or the *Integrations with External Systems* guide for information regarding the remaining parameters:

- Bibliographic Normalization
- Physical Inventory Enrichment
- Electronic Inventory Enrichment
- Digital Inventory Enrichment
- Collection Enrichment

6 Click **Save**. The publishing profile that you created appears in the list of profiles on the Publishing Profiles page with the **Actions** options that include the **Run** option to run the publishing job for the profile that you created. If you selected a **Scheduling** option in your publishing profile, the profile is listed on the Scheduled tab of the Monitor Jobs page as a **Publishing** job.

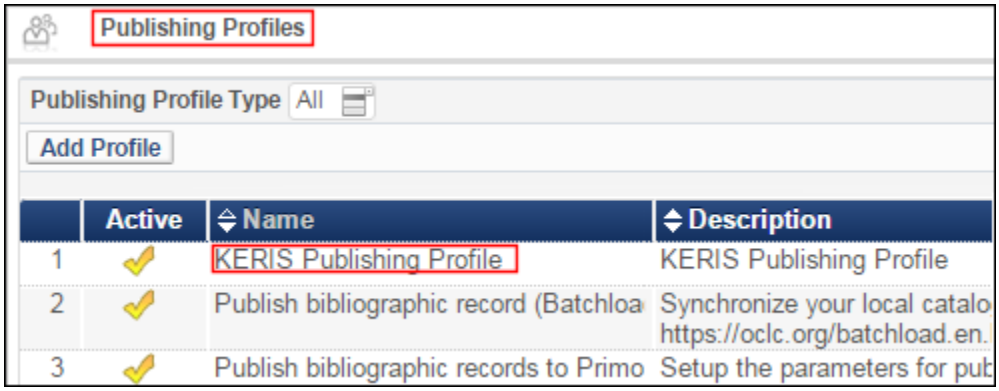

Figure 19 - Saved KERIS Publishing Profile

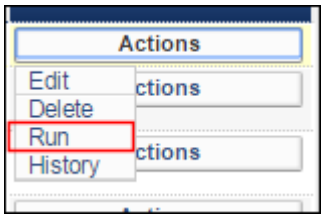

Figure 20 - Actions List of Options from the Publishing Profiles Page

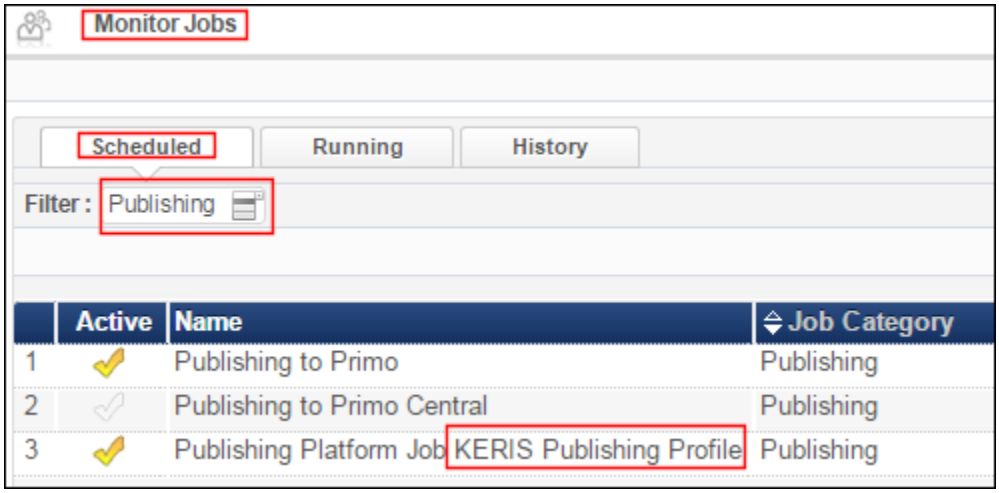

Figure 21 - Scheduled Tab on the Monitor Jobs Page Filtered for Scheduled Publishing Jobs

Extension Packs for MARC-Based Profiles

Description

Alma has introduced a concept called extension packs for the metadata profiles, whereby MARC-based bibliographic, holdings, and authority profiles with additional fields, subfields, and indicator values, repeating/nonrepeating and mandatory/nonmandatory specifications and URLs for online help can be easily adapted for regional needs. This includes the UNIMARC and KORMARC profiles (but not Dublin Core). With these MARC profile extension packs, institutions can easily load and use regional adaptations to the MARC standard.

For the extension pack schema and an example XML file, see the Alma Online Help or Alma Resource Management Guide (as of August 3rd).

Note: Ex Libris is currently creating a set of extension packs. We will announce these in the monthly Alma release notes when they become available.

Step-by-Step Instructions

The following role can add and remove extension packs:

- Cataloger Extended (In a future release, the role for extension packs will be changed to Catalog Administrator.)

To add an extension pack:

1 Open the Metadata Configuration List page by clicking **Metadata Configuration** from the **Cataloging** section in Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**).

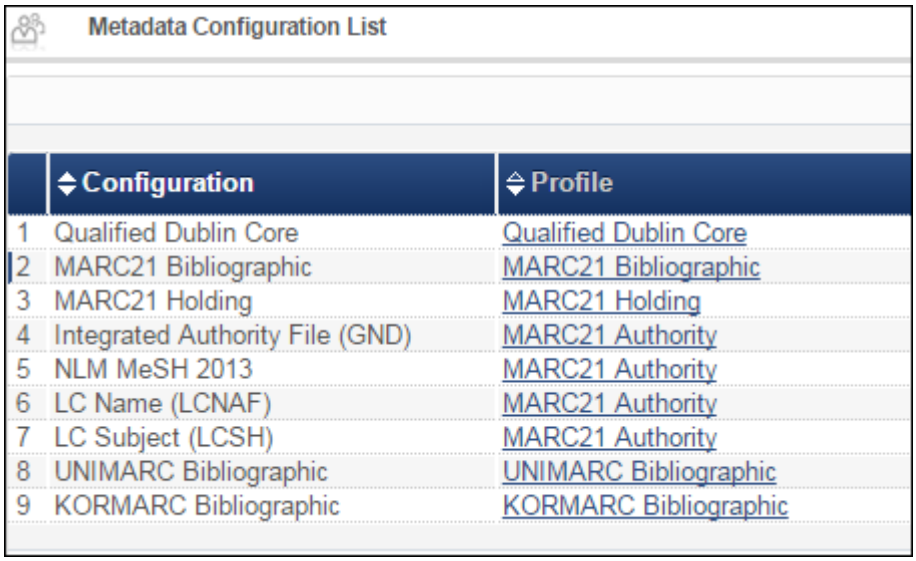

Figure 22 - Metadata Configuration List Page

2 Click the link for the profile you want to extend. (For this example, the **MARC21 Bibliographic** link is used.) The Profile Details page appears with the new **Add Extensions** and **Remove Extensions** buttons.

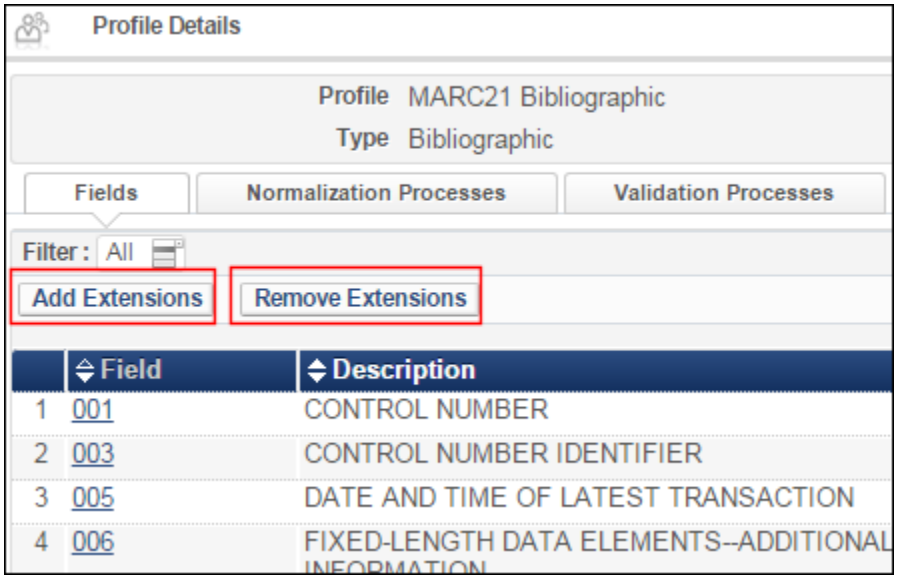

Figure 23 - Profile Details Page with Add/Remove Extensions Buttons

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

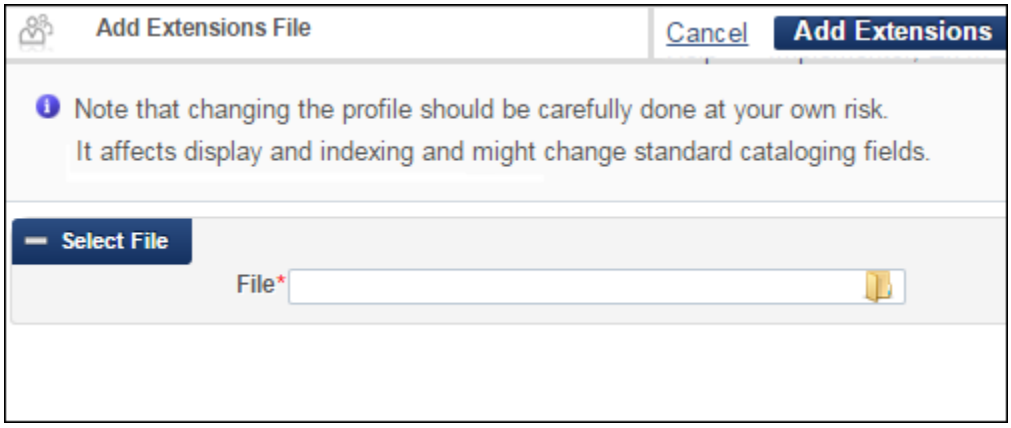

Figure 24 - Add Extensions File Page

4 Browse for/insert the .xml extension file that you previously created/saved (refer to Alma Online Help or *Alma Resource Management Guide* for more information) and click **Add Extensions**. When processing is complete, the system displays a confirmation message.

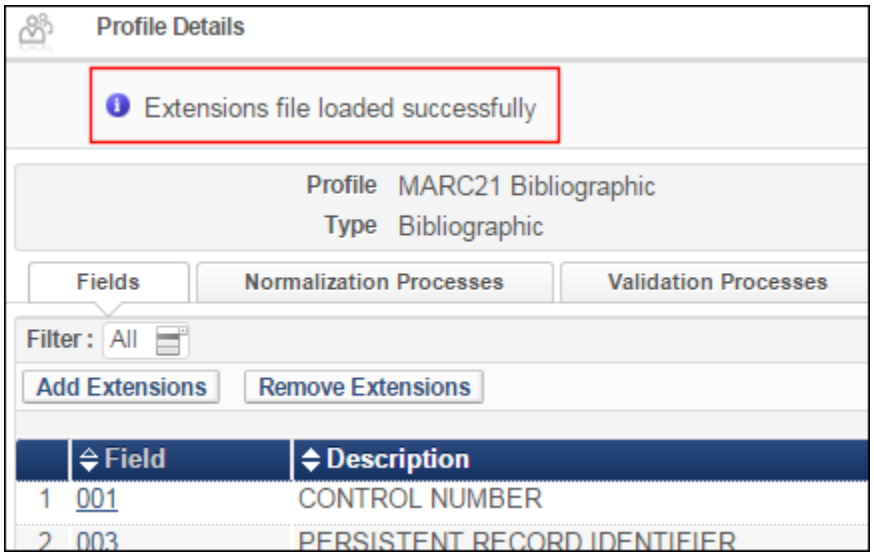

Figure 25 - Successfully Loaded Confirmation Message

If during processing the system encounters more than one occurrence of the same value, the first occurrence is applied and the other redundant occurrences are ignored.

5 Review/confirm your changes. For the rows (fields) that you have modified, the **Actions** button provides **View**, **Edit**, and **Restore** options.

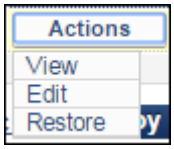

Figure 26 - New Actions for Modified Rows

For the rows that have not been modified, the **Actions** button continues to display the **View** and **Customize** options (provided with the original metadata profile settings).

6 Click **Deploy**.

To remove all extended values and restore the original metadata profile:

1 Open the Metadata Configuration List page by clicking **Metadata Configuration** from the **Cataloging** section in Resource Management configuration (**Resource Management > Resource Configuration > Configuration Menu**).

Metadata Configuration List

	Configuration	Profile
1	Qualified Dublin Core	Qualified Dublin Core
2	MARC21 Bibliographic	MARC21 Bibliographic
3	MARC21 Holding	MARC21 Holding
4	Integrated Authority File (GND)	MARC21 Authority
5	NLM MeSH 2013	MARC21 Authority
6	LC Name (LCNAF)	MARC21 Authority
7	LC Subject (LCSH)	MARC21 Authority
8	UNIMARC Bibliographic	UNIMARC Bibliographic
9	KORMARC Bibliographic	KORMARC Bibliographic

Figure 27 - Metadata Configuration List Page

2 Click the link for the profile you want to extend. (For this example procedure, the **MARC21 Bibliographic** link is used.) The Profile Details page appears with the new **Add Extensions** and **Remove Extensions** buttons.

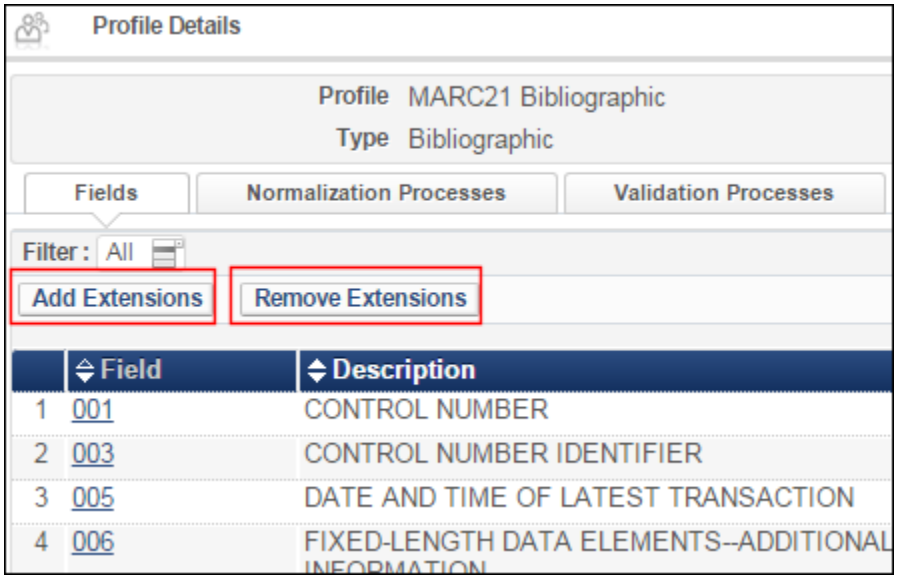

Figure 28 - Profile Details Page with Add/Remove Extensions Buttons

3 Click **Remove Extensions** and click **Confirm** in the confirmation dialog box. When processing is complete, the system displays a confirmation message.

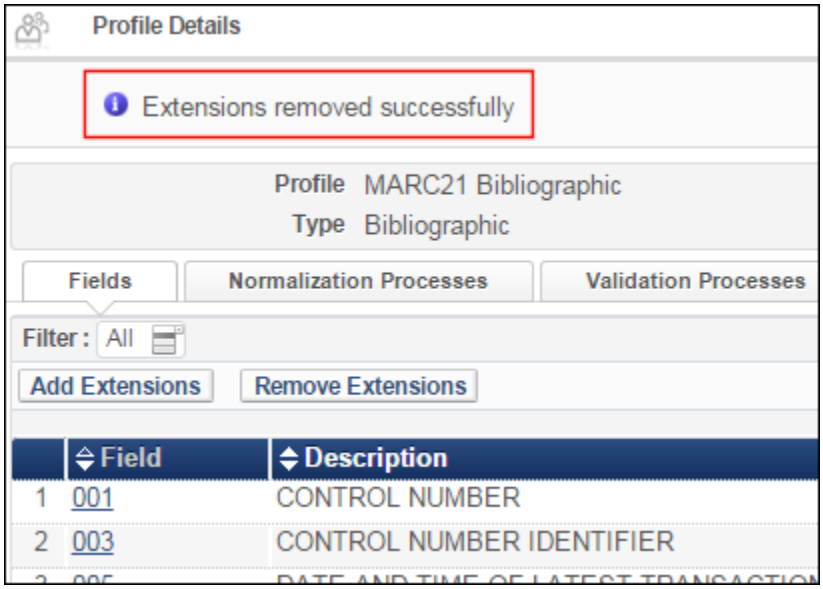

Figure 29 - Successfully Removed Message

4 Click **Deploy**.

Other Resource Management Enhancements

- Alma now provides enhanced support for Asian languages in repository and user searches:

Searching For	Also Returns Results For
Traditional Chinese/Kanji	Simplified Chinese/Kanji
Simplified Chinese/Kanji	Traditional Chinese/Kanji
Hangul (Korean)	Hanja (Korean)
Hiragana (Japanese)	Katakana (Japanese)

Contact Ex Libris customer support to enable these enhancements.

- The Usage (last 12 months) field in the repository search More Info pop-up was changed to **Combined usage (last 12 months)**. This field appears when searching for a local electronic portfolio. The field presents the amount of usage for this portfolio across all collections; see *Using the Repository Search Results List* in the *Alma Resource Management Guide* or the Alma Online Help.
- The MD Editor was enhanced with alternating colored background colors and grid lines between fields.

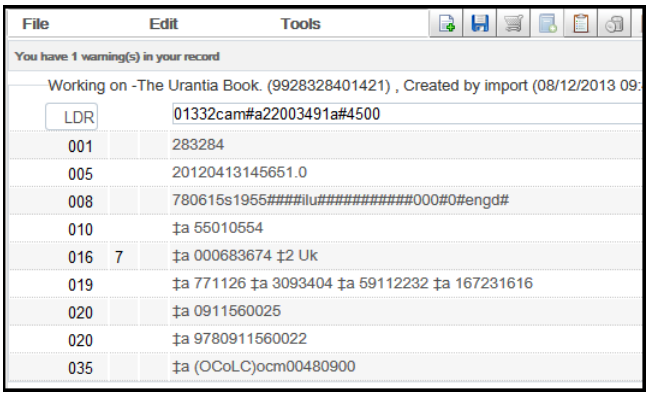

Figure 30 - MD Editor

- When viewing publishing information (click **More Info** beneath any record and then click the linked publishing information record), the field **Publishing profile** was added to allow the user to select the relevant publishing profile.

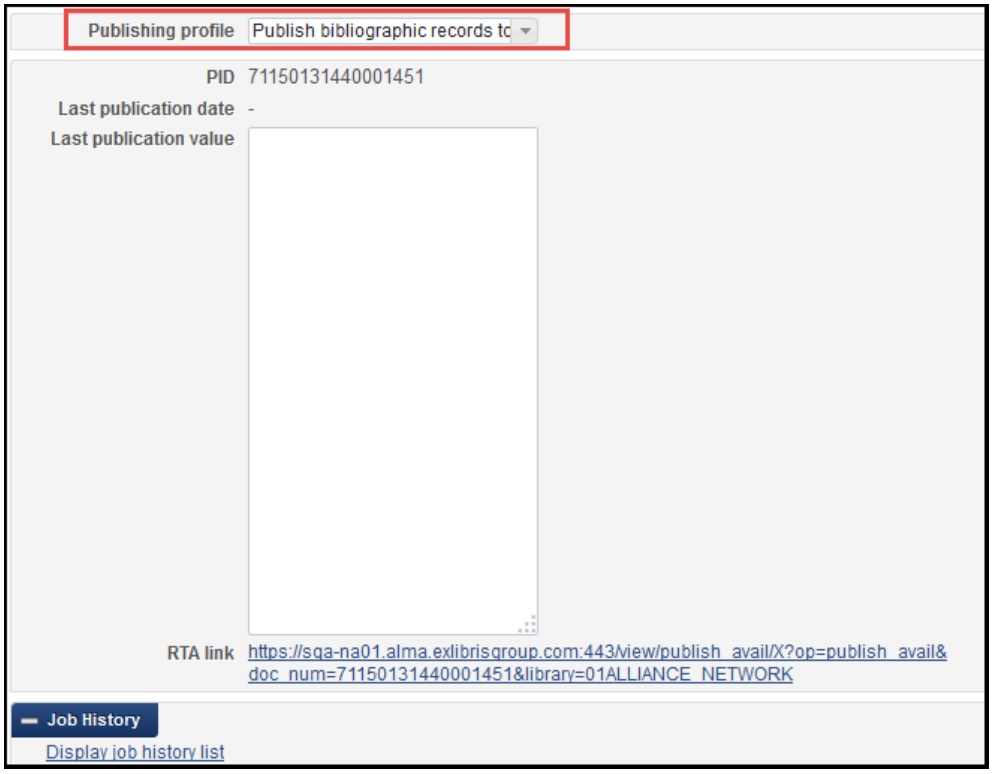

Figure 31 - Publishing Information

- When configuring an RSS profile, the field **Display location name** was added. When selected, the RSS contains the full name of the location instead of the location code—for example, **Location – Faculty Shelves** instead of **Location – FACL**. For detailed information on configuring RSS profiles, see **Configuring RSS in Alma** in the *Alma Resource Management Guide* or Alma Online Help.

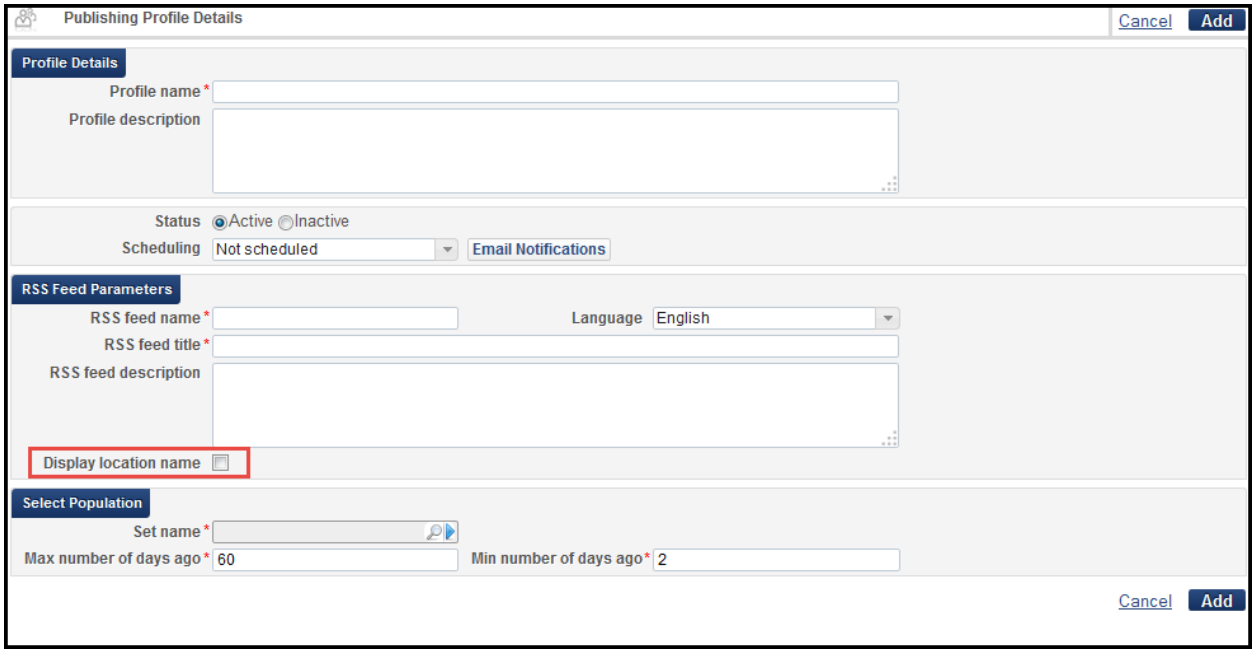

Figure 32 - RSS Publishing Profile

- SRU searches now allow matches using *less than* <, *less or equal than* <=, *greater than* >, and *greater or equal than* >= for numeric and date field comparisons. For more information, see https://developers.exlibrisgroup.com/alma/integrations/SRU.

Fulfillment

The following are enhancements for the Fulfillment functional area in this release of Alma**:**

Improved Dematic ASRS Inventory Export Job Report

Description

The report includes the following new data/sections:

- Success and failure counters for Inventory Add (IA) and Inventory Delete (ID) messages
- Barcode for successfully sent messages
- Barcode and failure reasons for failure messages
- Addition of **Records Processed From** and **Records Processed To** in the Job Parameters section
- Alert section including brief summary of warnings and errors

Step-by-Step Instructions

The following roles can view the Dematic ASRS Inventory Export Job Report:

- Fulfillment Administrator

To view the Dematic ASRS Inventory Export Job Report:

On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), select **Actions > History** for the Dematic ASRS Inventory Export Job.

The new report contains six sections.

- Report run statistics (name, ID, user, and run time information)
- Failure alerts for messages that could not be sent
- Total counts of the messages processed
- Date range for the report
- Breakdown count of Inventory Add messages successfully sent and failed
- Breakdown count of Inventory Delete messages successfully sent and failed

Name Inventory Remote Storage Update - ASRS
Process ID 88568920000521
Started on 07/01/2015 10:01:33 IDT
Created by exl_impl (07/01/2015)
Total run time 4 Seconds
Finished on 07/01/2015 10:01:37 IDT

Alerts

Tools

Failed to send 4 Inventory Add messages to remote storage.
Failed to send 1 Inventory Delete messages to remote storage.

Job Results Summary

Tools

1	Total messages processed	9
2	Total Inventory Add messages sent successfully	3
3	Total Inventory Add messages failed	4
4	Total Inventory Delete messages sent successfully	1
5	Total Inventory Delete messages failed	1

Job Dates Range

Tools

	Parameter	Value
1	Records processed from	06/24/2015 10:09:49 IDT
2	Records processed to	07/01/2015 10:01:33 IDT

Inventory Add Messages

Tools

	Description	Count	
1	Inventory Add message was sent successfully	3	Preview records
2	Failed to send Inventory Add message	4	Preview records

Inventory Delete Messages

Tools

	Description	Count	
1	Inventory Delete message was sent successfully	1	Preview records
2	Failed to send Inventory Delete message	1	Preview records

Figure 33 – Dematic ASRS Inventory Export Job Report

The Inventory Add and Inventory Delete messages can be viewed in more detail by clicking **Preview Records** next to each line. Messages sent successfully show the barcodes that were sent. Messages that failed to send show barcodes and error messages.

ExLibris Alma Development Tasks Analytics Currently at: Main Library - Main Library... Help Implementer, Ex ...

Events Report Cancel

Inventory Add messages sent successfully

Description Inventory Add message was sent successfully

Inventory Add messages sent successfully

1 - 3 of 3 Records Columns Tools

	Barcode
1	MZ123123
2	MZ1234321
3	MZ321321

Cancel

© Ex Libris Ltd., 2015

Figure 34 – Successful Message Listing

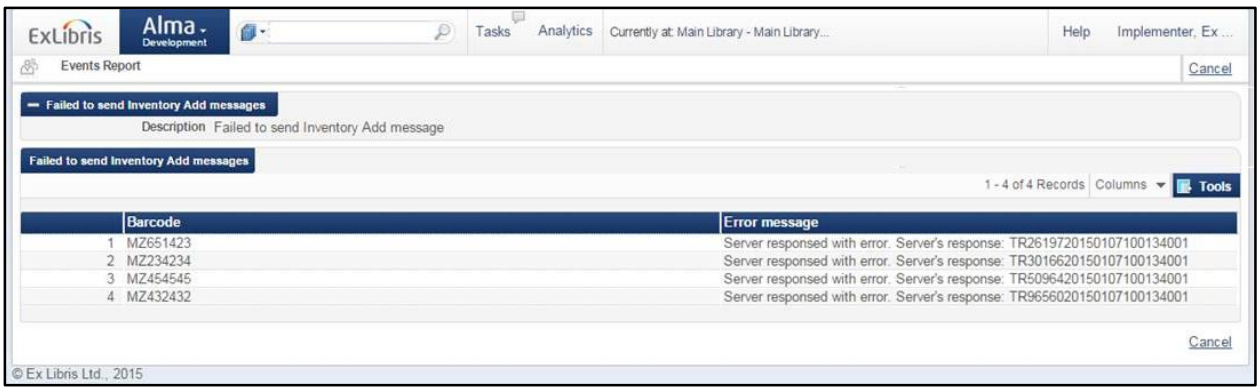

Figure 35 – Failure Message Listing

Copyright Compliance Tracking

Description

Alma provides a means of recording the intended usage information for staff digitization requests and non-repository reading list citations. Information that you add about intended usage enhances the copyright clearance process and will provide information regarding the digitization process in Analytics in a future release.

New fields were added to the digitization process in more than one location to enable this feature. In addition, API fields were added to enable this feature (see the *Alma APIs*).

Step-by-Step Instructions

The following role can add intended usage information for digitization requests:

- Work Order Operator

The following roles can add intended usage information for on the Edit Reading List Citation page:

- Fulfillment Services Operator
- Fulfillment Services Manager

You can add intended usage information on the Edit Reading List Citation page when adding a non-repository citation **(Fulfillment > Course Reserves > Reading Lists**; click a reading list, and click **Add Non-Repository Citation**).

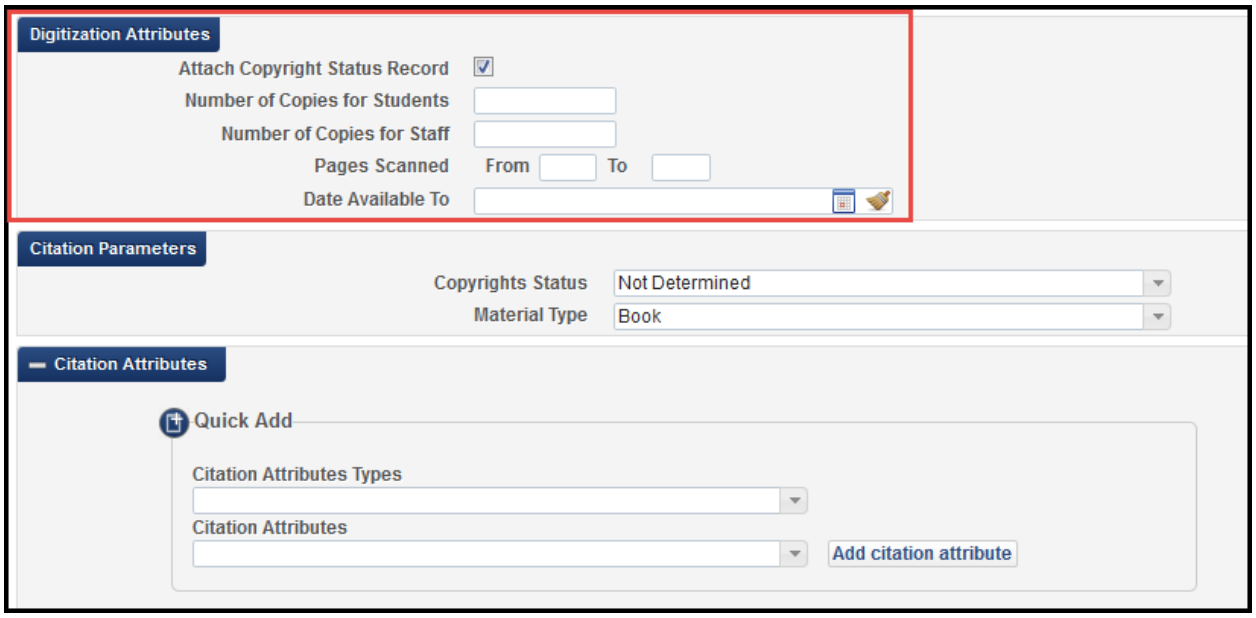

Figure 36 – Intended Usage Information on the Edit Reading List Citation Page

Select **Attach copyright status record**. The remaining fields appear.

In addition, you can add usage information for digitization requests on the Create Request page (click **Request** or **Document Delivery** beneath an item in the Repository Search page) when adding a staff digitization request (patron digitization requests are recorded automatically without any information required from the user).

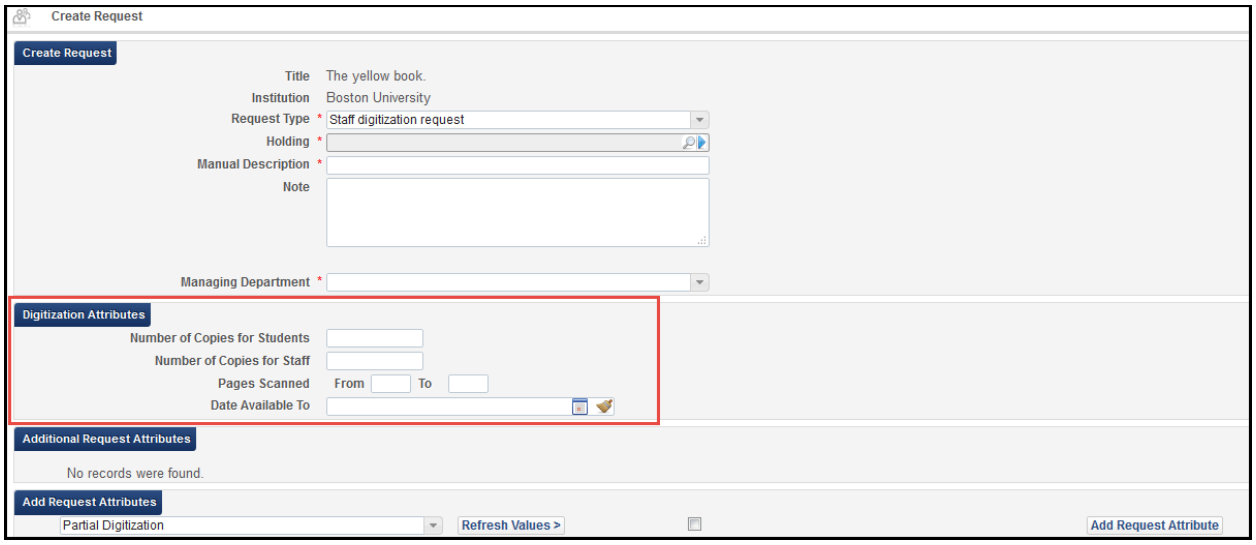

Figure 37 – Intended Usage Information on the Staff Digitization Request Page

To add intended usage information (on either page):

1 Enter the information in the fields:

- **Number of copies for students**

- **Number of copies for staff**
- **Pages scanned** – Enter the **From** and **To** pages that will be digitized
- **Date available to** – Enter the date until which the digitized copies will be made available.

2 Continue with the relevant workflow.

Other Fulfillment Enhancements

- The field **Material type** was added to the Edit Reading List Citation page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list, click **Edit** beneath a 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

Citation | Notes

Resource Information

Title *	A nation for all : race, inequality, and politics in twentieth-century Cuba /
Author	Fuente
Author Initials	Alejandro de la,
Edition	
ISBN	0807826081 (cloth : alk. paper)
LCCN	
OCLC Number	
Publisher	University of North Carolina Press
Publication Date	c2001.
Place of Publication	Chapel Hill :
Additional Person Name	
Source	
Series Title Number	
Call Number	
Note	
Volume	
Part	
Chapter	
Pages	

Citation Parameters

Copyrights Status	Not Determined
Material Type	Book

Citation Attributes

Quick Add

Citation Attributes Types

Citation Attributes

Add citation attribute

Figure 38 - Edit Reading List Citation Page

The available options are:

- Audio Recording
- Artwork
- Book
- Computer Program
- Article

- Document
- Map
- Thesis
- Video

- The role **Instructor** was added for future integration with Leganto.
- In the Active/Expired Hold Shelf lists, a new label now appears displaying the **Alternative Call Number** as taken from the item.

Figure 39 – Alternative Call Number Displayed on Active Hold Shelf Items Page

- A **More Info** link was added to the reading list citations list for each repository citation.
- The View It tab now uses separate classes, **authNote** and **publicNote**, for displaying the authentication notes and public notes. It is now possible to customize both of these elements.
- Previously, the material type field in the Get It tab request form did not have an ID in the HTML. This field now contains an ID element and can be customized. The HTML appears as follows:

```
<li id="materialTypeH" class="width24 nextLine">
<label for="selectMaterialType">Material Type:</label>
</li>
<li id="materialTypeV" class="width72">
<select id="selectMaterialType" onchange="updateSelectedService(this);"
name="materialType">
</li>
```

- The following labels appearing in Primo can now be configured in Alma on the Discovery Interface Labels Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Labels**):
  - Pickup Institution (`c.uresolver.request.pickupInstitution`)
  - Pickup Library (`c.uresolver.request.pickupLibrary`)
  - Please select a pickup library (`c.uresolver.request.madatory_pickup_library`)
  - Please select a pickup institution (`c.uresolver.request.madatory_pickup_institution`)
  - My Institution (`c.uresolver.request.institution_dropdown_my_institution`)
  - Other institutions (`c.uresolver.request.institution_dropdown_other_institutions`)
  - Show License (`c.uresolver.viewit.license.show_license`): In the Primo View It tab
  - Hide License (`c.uresolver.viewit.license.hide_license`): In the Primo View It tab, after Show License was selected
- The OpenURL Link Resolver now recognizes **portfolio_id** as a pointer to a specific portfolio. This may be used in a discovery system to refer to a specific record in Alma.
- The OpenURL Link Resolver now supports the following proprietary SFX attributes for linking and service calculation. OpenURL-compliant sources that used proprietary SFX attributes can continue to use them.
  - SFX object ID can be used to retrieve full text service for a specific bibliographic record, for example: `url_ver=Z39.88-2004&ctx_ver=Z39.88-2004&ctx_enc=info:ofi/enc:UTF-8&rfr_id=info:sid/sfxit.com:opac_856&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&sfx.ignore_date_threshold=1&rft.object_id=954925377898&svc_val_fmt=info:ofi/fmt:kev:mtx:sch_svc`
  - The SFX-specific `e_collection` source parser is now supported, for example: `sid=sfx:e_collection&issn=0160-7383&pid=serviceType=getFullTxt`
  - The SFX propriety attribute `sfx.ignore_date_coverage` can be used to disregard coverage during the service calculation.

Resource Sharing

The following sections describe the features provided for the Resource Sharing functional area in this release of Alma.

Viewing Local Resources on a Borrowing Request

Description

If local resources exist but a borrower creates a resource sharing request, Alma now enables you to view the local resources for the request. Viewing the local resources can be done while creating the resource sharing request, or after the request has already been created. In either case, the operator may decide to place a local hold request on the matching local resource. If this is done within the process of creating the resource sharing request, the resource sharing request will not be created.

New buttons were added at the bottom of the self-ownership dialog box and in the borrowing requests list.

Step-by-Step Instructions

The following roles can view the local resources on a borrowing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view matching local resources while creating a resource sharing request:

1. Enter a borrowing request. If the requested item already exists in the local institution, the self-ownership pop-up appears. The **View Local Resources** button now appears next to the **Confirm** button.

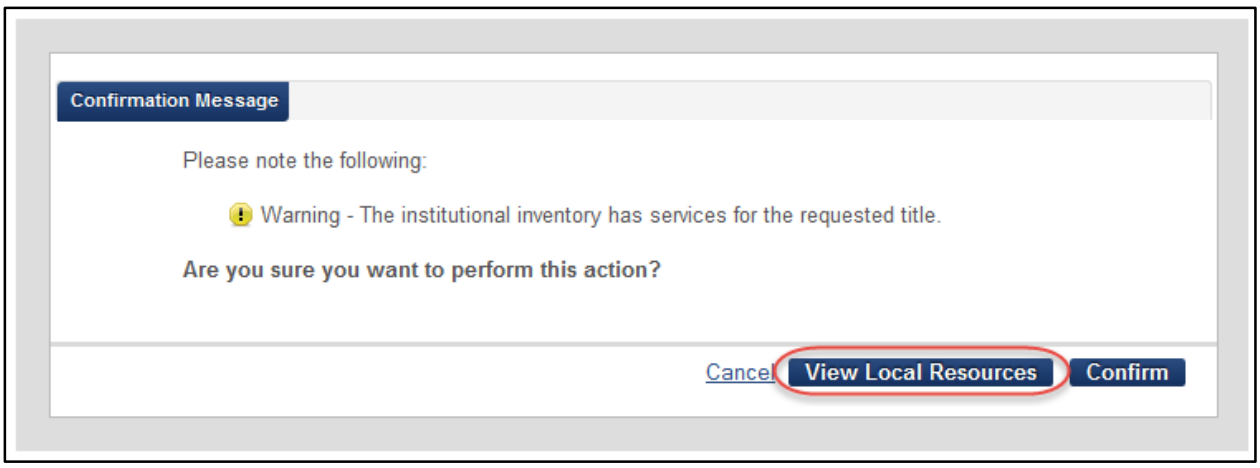

Figure 40 – Self-Ownership Pop-up

2 Click the **View Local Resources** button to bring up a listing of the matching local resources.

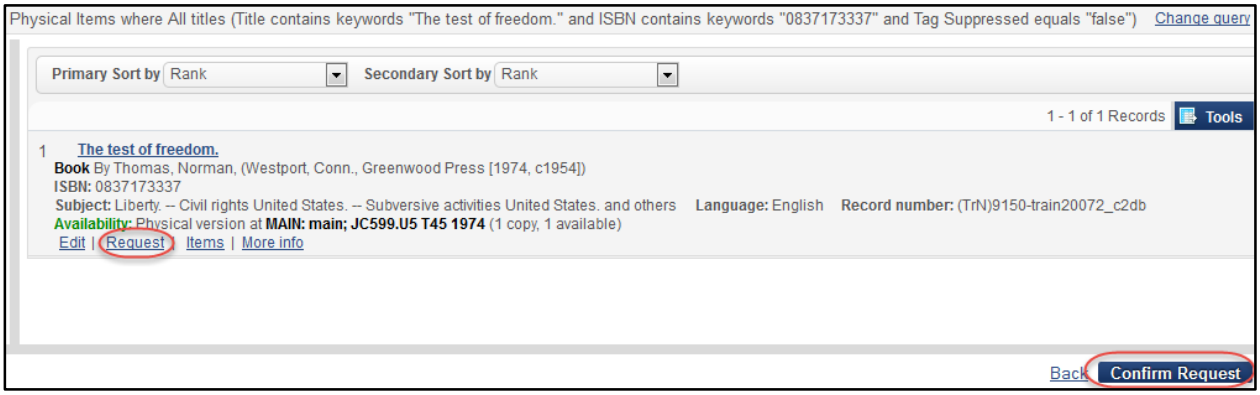

Figure 41 – Local Resource List

3 Click **Request** from the local item to abort the borrowing request and create a local request. The following confirmation message appears.

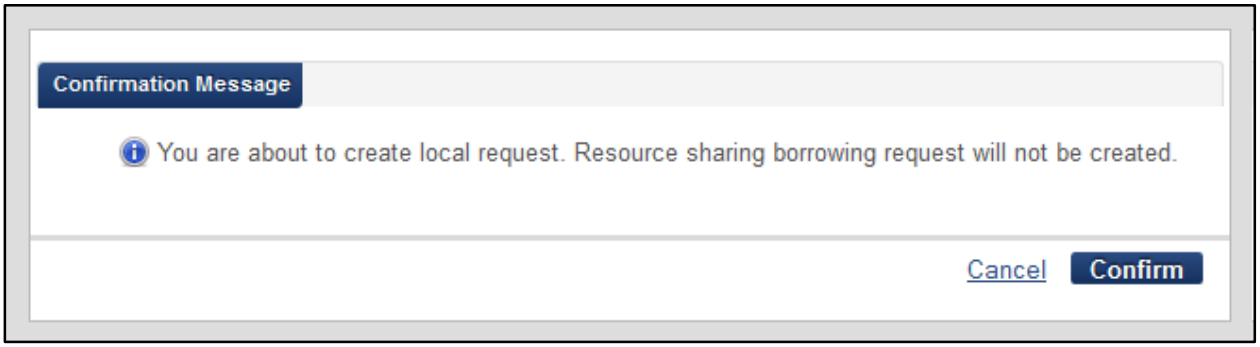

Figure 42 – Confirmation of Local Request with No Borrowing Request

4 Click **Confirm Request** on the resource listing (Figure 41 – Local Resource List) or **Confirm** on the self-ownership pop-up (Figure 40 – Self-Ownership Pop-up) if you want to continue with the creation of the borrowing request rather than place a local hold request. The

request appears in the Resource Sharing Borrowing Requests List. The local resources can still be accessed from this point. Each request has a link to **View Local Resources**.

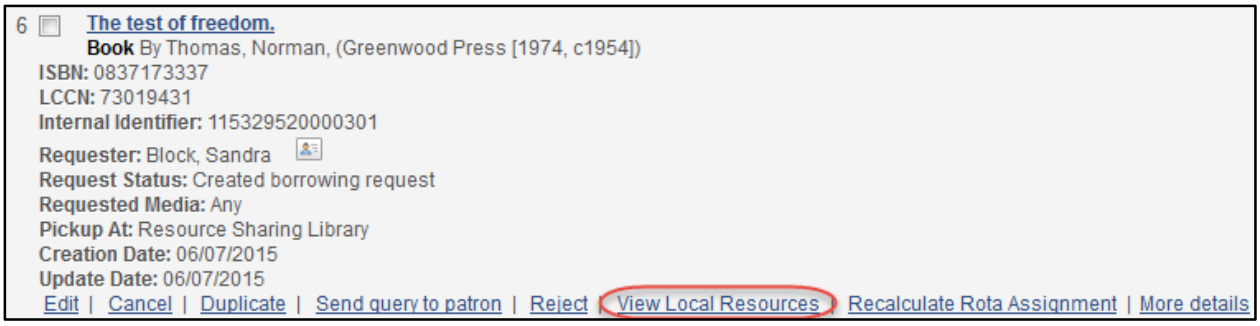

Figure 43 – Borrowing Request List

5 Select **View Local Resources** to return to the resource listing (Figure 41 – Local Resource List). You can still create a local request even though the resource sharing request has already been placed. When you click **Request**, the following message appears:

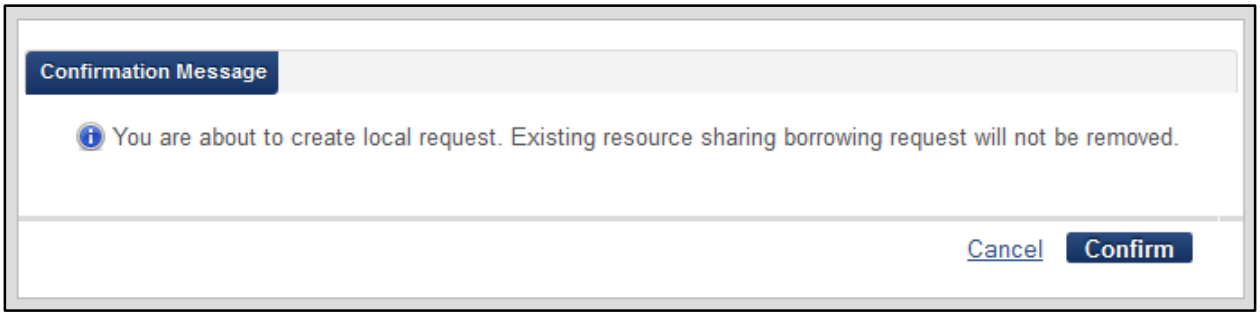

Figure 44 – Confirmation of Local Request with Borrowing Request Already Existing

Managing Brokers' Digital Requests

The broker-based workflow now supports a digital workflow in addition to the physical workflow. Affected messages are request, checkout, and accept. Actions are taken on the received NCIP messages.

Please refer to the Developer Network for a detailed description of how Alma identifies these messages as related to requests for digital supply: **https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker/ncip/application_profile/v2**

The effect on the request process can be seen in the flowchart below.

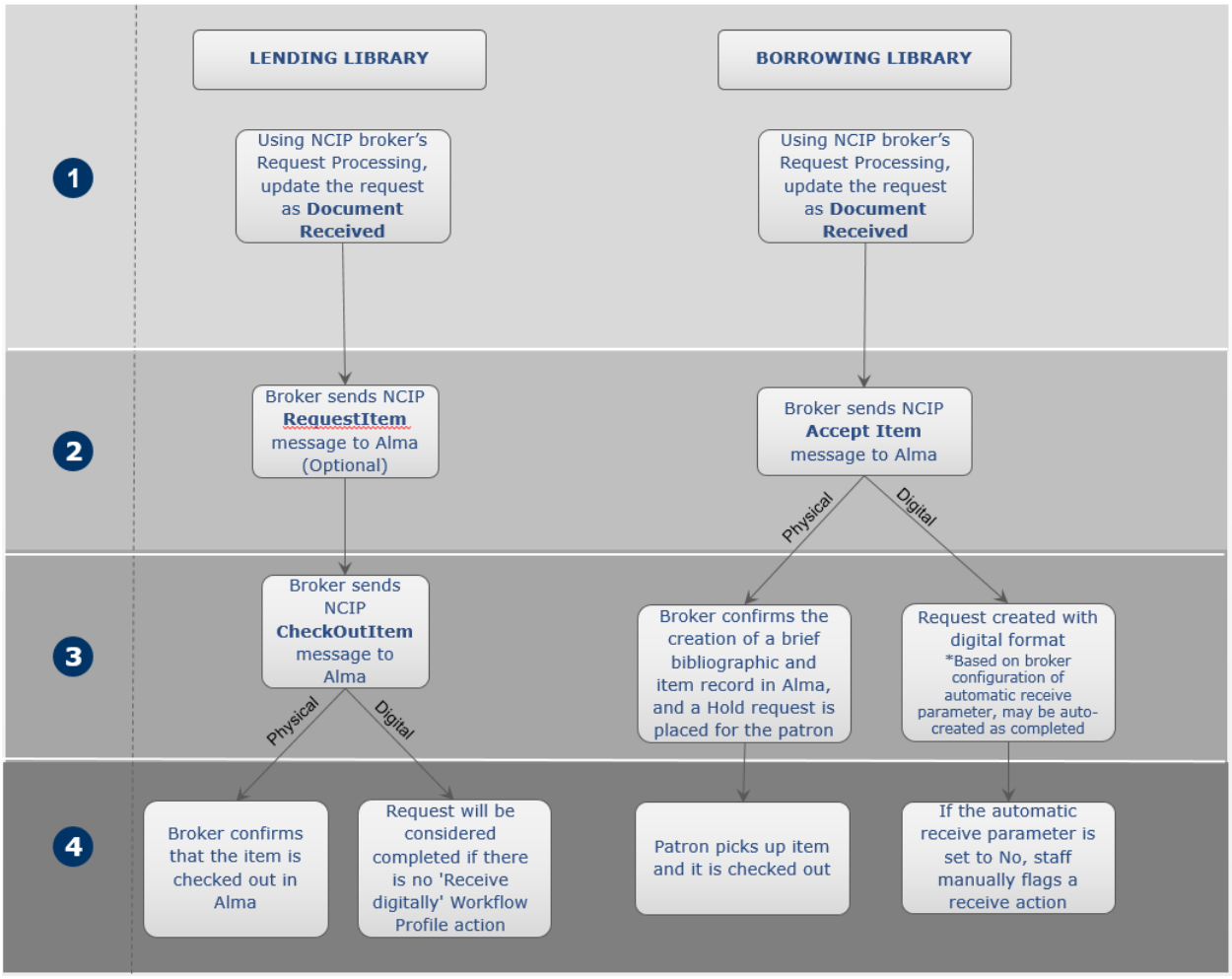

Figure 45 – Broker Request Process

Administration

The following sections describe the features provided for the Administration functional area in this release of Alma.

Limiting User Information Exposed in User Pop-Ups

Description

As an enhancement to user privacy, you can now configure which elements of user information are revealed in patron contact pop-up boxes. This configuration is applicable to those pop-up boxes that are opened from within a list. Pop-ups that appear from a borrowing or lending request form are static and are not customizable. The configuration process distinguishes between Staff and Public users.

The **Preferred Identifier** and **User Group** fields were added to the list of elements that can be customized. They are disabled by default. The **User Group** field appears in the borrowing and lending request pop-ups. The **Preferred Identifier** field does not.

Step-by-Step Instructions

The following roles can modify the Contact Information Pop-up window:

- User Administrator
- General System Administrator

To configure the User Information pop-up window:

1. On the User Management configuration menu (**Administration > User Management Configuration** > **Configuration Menu**), select **Contact Information Pop-up**.

Figure 46 – User Management Menu

Within the **Contact Information Table**, each element that can be customized is listed twice – once per user type (public and staff).

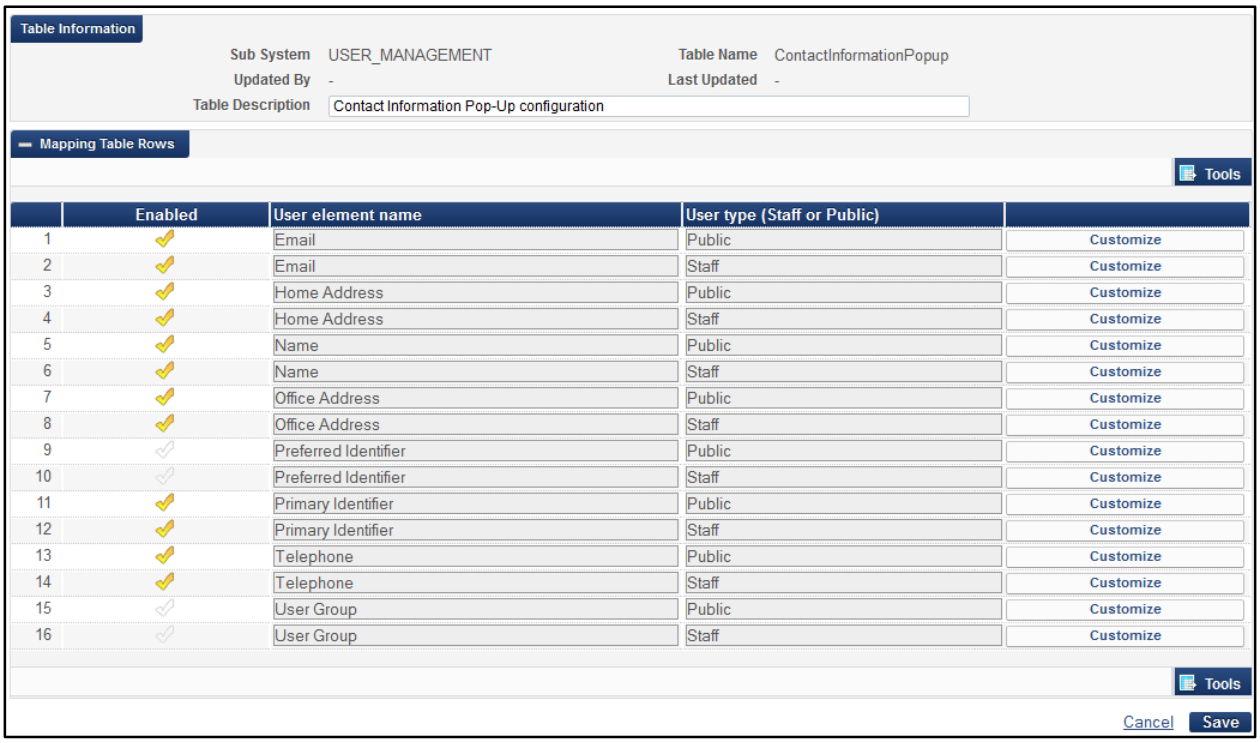

Figure 47 – New Contact Information Table

2 To enable or disable an element, click **Customize** at the end of that line. Then click the **Enabled** check mark. A colored check mark means that element is shown on the information pop-up. A clear check mark means that element is hidden from the information pop-up.

For example, if the email address is enabled, it appears in the pop-up as follows:

Figure 48 – User Pop-up with Email Enabled

If the email address is disabled, it is not in the pop-up:

Figure 49 – User Pop-up with Email Disabled

Central Authentication Services (CAS) Support

Description

CAS is a single sign-on protocol for the web. It permits a user to provide user credentials, such as user ID and password, only one time to access multiple applications. Web applications, including Alma, that use the CAS protocol can be given user access without needing to enter the user's security credentials twice.

Step-by-Step Instructions

The following roles can configure a CAS profile:

- General System Administrator

To configure a CAS profile:

1 On the Integration Profiles page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), click **Add Integration Profile**.

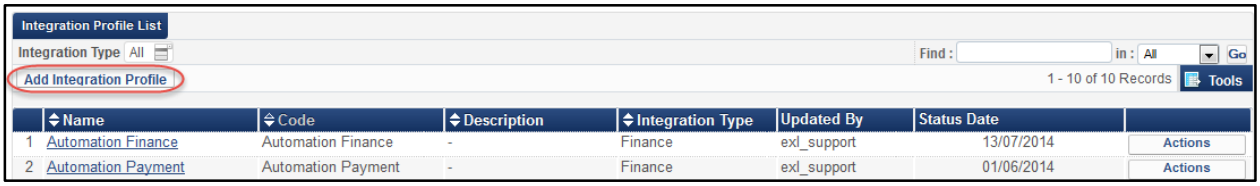

Figure 50 – Integration Profile Listing

2 Add profile information, specifying CAS as the **Integration Type**.

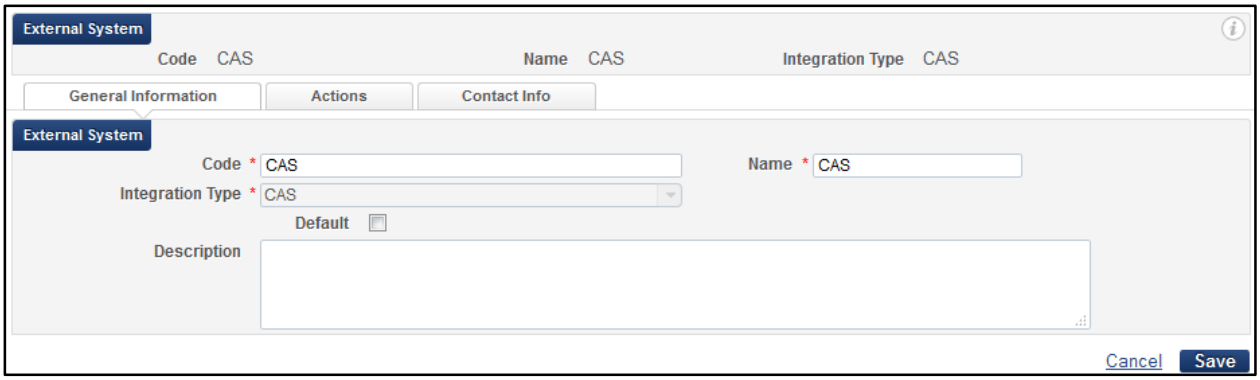

Figure 51 – External System Setup

3 Select the **Actions** tab, and ensure that the **Active** check box is selected. Enter the CAS host URL provided to you by your CAS provider.

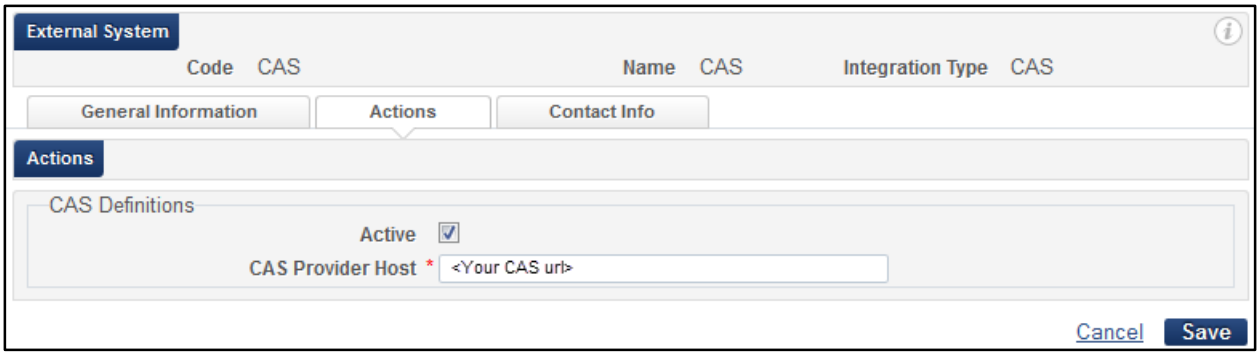

Figure 52 – External System Activation

Following Alma profile activation and third party configuration, your Alma login shortcut will be changed by your local support staff to one of the following two URLs:

- `https://<server>.alma.exlibrisgroup.com/mng/login?institute=<institution_name>&auth=CAS`
- `https://<server>.alma.exlibrisgroup.com/institution/<institution_name>/CAS`

Upon signing in to Alma, you are redirected to your CAS page to sign in. When sign-in is successful, you are automatically directed back to Alma.

For more information on CAS, see **https://developers.exlibrisgroup.com/alma/integrations/user-management/CAS**.

Other Administration Enhancements

- The user management configuration has a new customer parameter, **from_address** (**Administration > User Management Configuration > Configuration Menu > General > Other Settings**). The parameter indicates an email that will be added as the **From** field when sending an email to the user using the **Send email to user** envelope icon on the User Details page.

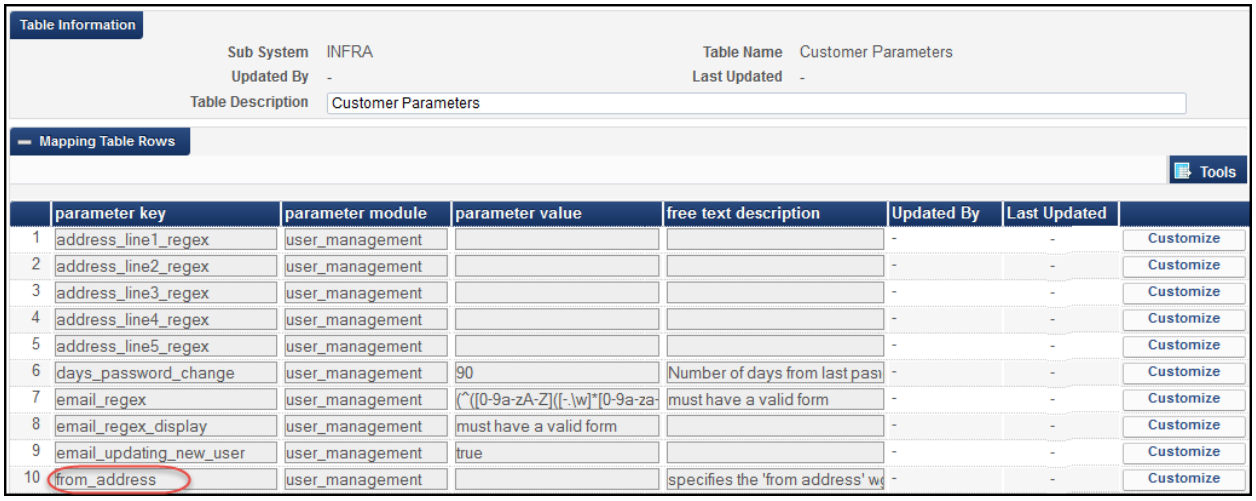

Figure 53 – User Management Configuration – Other Settings

- The Alma Get It and View It tabs can now be integrated with any third-party discovery system that is configured to use a SAML-based identity provider for both Alma and the discovery interface authentication. For detailed information, see **https://developers.exlibrisgroup.com/alma/integrations/discovery**.
- A progress indication was added for the Electronic Activation and Export Portfolios jobs on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs > Running** tab). Since activation is performed on sets of portfolios (set = 400 portfolios), each time a set is activated, the progress indication is updated.

Collaborative Networks and Multicampus Institutions

The following sections describe the features provided for the collaborative networks and multicampus institutions functional areas in this release of Alma**.**

Enhance Z39.50 Results with Collaborative Network Member Holdings

Description

Alma now enables you to include the ownership of holdings by member institutions in a collaborative network when responding to a Z39.50 request. The returned information includes the institution, the bibliographic record (MMS ID), and the format (physical, electronic, or digital). This feature supports more efficient queries by collaborative network members, and is often required for third-party integrations and resource sharing purposes.

Only requests to the Network Zone include the ownership of member institutions.

An additional field, **Enrich with members availability,** was added to the **Actions** tab of the Z39.50 integration profile for this purpose.

Step-by-Step Instructions

The following roles can enable member institution ownership in a Z39.50 response:

- General System Administrator

To enable member institution ownership in a Z39.50 response:

While configuring the **Actions** tab of the Z39.50 integration profile in the Network Zone (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**; add or edit the **Z39.50** profile), select **Enrich with members availability**.

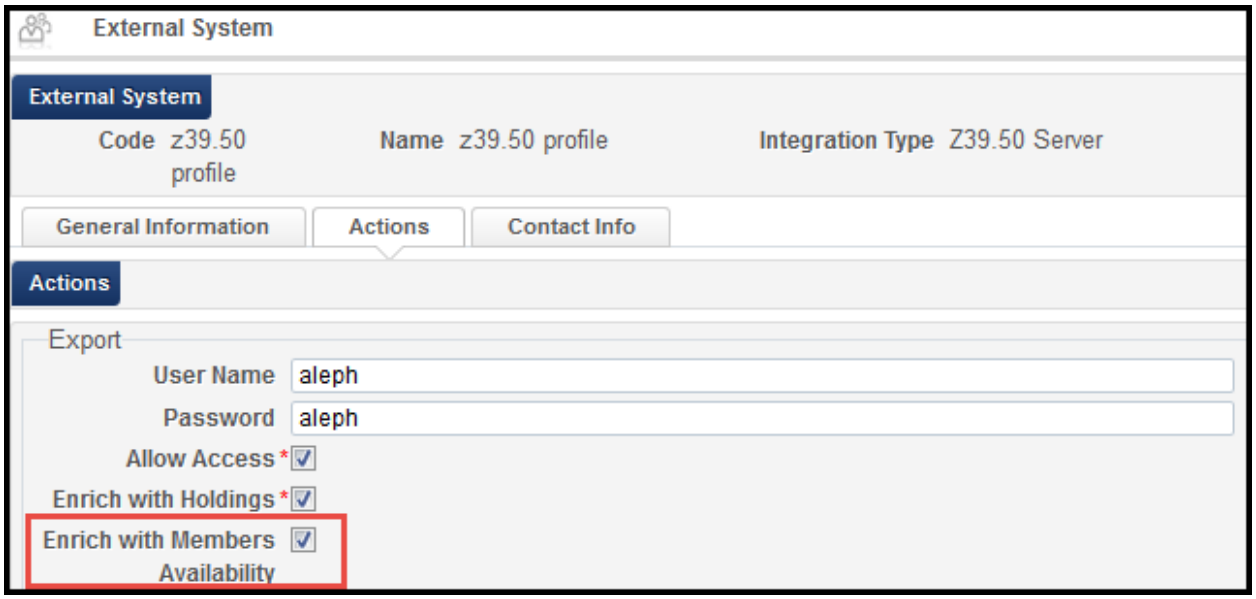

Figure 54 - Z39.50 Integration Profile Actions Tab

Note: This option appears only when configuring the profile in the Network Zone.

The ownership information is available only for MARC21 results. Member institution ownership information is returned in 852 fields, in the following subfields:

- $a – Institution code
- $6 – MMS ID
- $9 – **P** (print), **E** (electronic), or **D** (digital)

For more information, see **Z39.50 Search** in the *Alma Integrations with External Systems Guide* or the Alma Online Help.

Other Collaborative Network Enhancements

- The OpenURL Link Resolver now recognizes **ie** as a pointer to a specific intellectual entity. This may be used in a discovery system to refer to a specific record in Alma. When **ie** is included, other metadata is ignored. Institutions that share Primo but do not have a Network Zone should not use this field and instead send the metadata, as usual.

Analytics

The following Analytics enhancements were made for this release of Alma:

Physical Items Subject Area Enhanced with New Fields

Description

In order to expand the possibilities for the creation of various reports related to physical items, the following new fields have been added to the Physical Item Details dimension of the Physical Items subject area:

- Temporary Item Policy
- Fulfillment Note
- Internal Note 1
- Internal Note 2
- Internal Note 3
- Inventory Number
- Item Replacement Cost
- Chron J
- Chron K
- Chron L
- Chron M
- Enum B
- Enum C
- Enum D
- Enum E
- Enum F
- Enum G
- Enum H
- Pieces

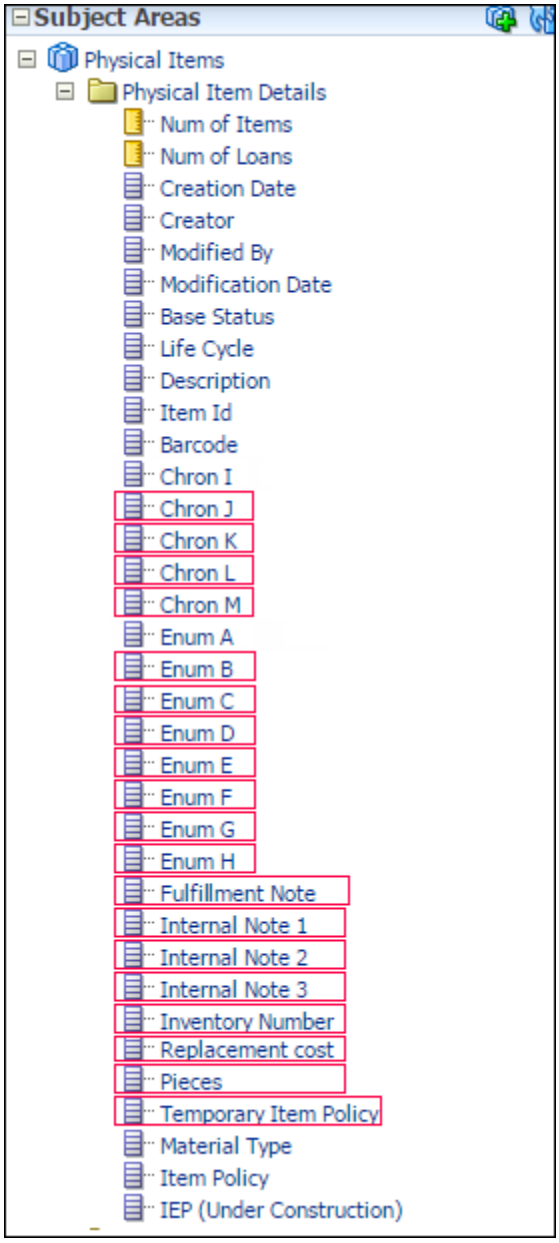

Figure 55 – Physical Item Detail Fields

Step-by-Step Instructions

The Design Analytics role can access this enhancement. The following is an example of a report using some of the new Physical Item Detail fields:

Chron J	Internal Note 1	Statistics Note 2	Statistics Note 1	Enum B	Chron K
	Donor: Unknown			19th ed.	
				2009	
				2012	
				2013	
				2014	
				2015-1	
				Dec	
				Feb	
				Jan-Mar	
				Mar-Apr	
				Nov	
				Nov-Dec	
	Status: available	2YRCIRC: 0	TOT CHKOUT: 1	Nov. 2006-May 2015	
				Oct	
				Oct-Dec	
				Special Issue	
Apr				Suppl	
Indv. Emp. Rights Dec.				Update v.40 no.1	
				index	
Fall/Winter				no.1	
Feb.	Dup recd				
Jan					
Jan.	Dup recd				
					27
					6
Mar.					
May					
fall					
spring					
		2YRCIRC: 0	TOT CHKOUT: 2		
Jan.-June				no.1-11	
Jan.-Feb.				no.1-2	
	Status: available	2YRCIRC: 0	TOT CHKOUT: 0		

Figure 56 – Physical Item Detail Fields - Report

Publishing Identifier Number Available in Analytics

Description

The publishing identifier number for records is now available when creating Analytics reports. You can use this identifier to reconcile Analytics data, which has only MMS IDs, with the number from record IDs supplied to Primo from Alma. You can then pass the results to a

reading list system in order to make relegation and capacity decisions. This number is essential for reports on Fulfillment activity where this number is the only common ID between the two systems. To support this development, the following two fields have been added:

- Physical Items Details > IEP
- E-Inventory > Portfolio > IEE

Note: For the August release, these fields are available only for records that will be added starting from this release, and not for previously existing records.

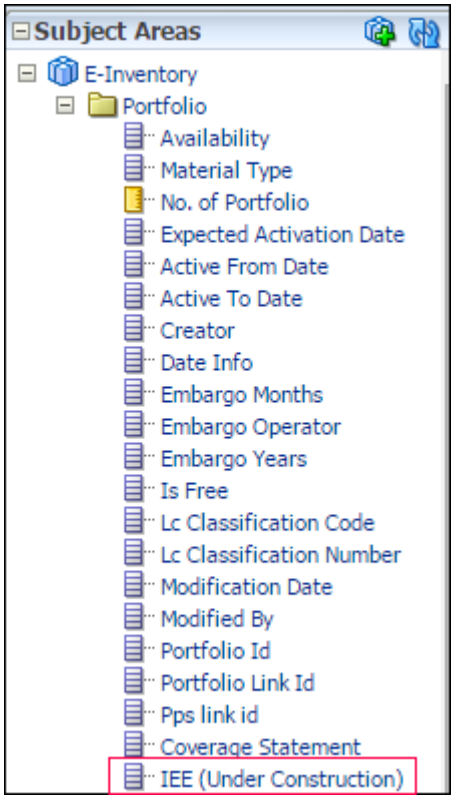

Figure 57 – IEE

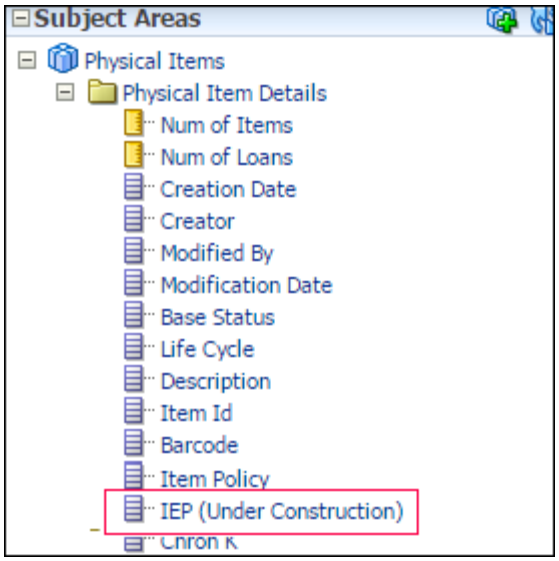

Figure 58 – IEP

Step-by-Step Instructions

The Design Analytics role can access this enhancement. The following are examples of reports using the new IEE and IEP fields:

IEE (Under Construction)	MMS Id	Title	ISBN
51146193720001421	9921894060001421	Apple Pro Training Series: Logic Pro 9 and Logic Express 9	0321684443; 9780321684448
51146193730001421	9921894070001421	Apple Pro Training Series: Final Cut Pro 7 Advanced Editing	0321701178; 9780321701176
51146193740001421	9921894080001421	Apple Pro Training Series: DVD Studio Pro 4, Third Edition	0321699882; 9780321699886
51146193780001421	9921894120001421	Navy and Marine Corps in Regional Conflict in the 21st Century	0309573572; 9780309573573
51146193830001421	9921894170001421	Expanding the Uses of Naval Ocean Science and Technology	0309586720; 9780309586726
51146193870001421	9921894210001421	Science Teacher Preparation in an Era of Standards-Based Reform	030958373X; 9780309583732
51146193890001421	9921894230001421	Preparing for the 21st Century: The Education Imperative	0309584671; 9780309584678
51146193910001421	9921894250001421	Statement on Quality of Care	0309573890; 9780309573894

Figure 59 – IEE - Report

IEP (Under Construction)	MMS Id	ISBN	Title
21100471510001421	9989822101421	0672326191; 9780672326196	Sams teach yourself PHP in 24 hours /
21100510160001421	99220729301421	9780292728158; 0292728158	Plants of the metroplex /
21100525910001421	99220746201421	9780788860294; 0788860291	The life aquatic with Steve Zissou
21100931620001421	99147218501421	0123736447; 9780123736444	The prefrontal cortex /
21101299220001421	99205628101421	0446577898; 9780446577892	The inner circle /
21102225000001421	9988694701421	0571202152; 9780571202157	Taxi driver /
21102846090001421	99201337001421	9780788607868; 0788607863	The Texas chain saw massacre

Figure 60 – IEP - Report

OBI Upgraded to Latest Version

OBI was upgraded to the latest version. This fixes the following issues:

- The Export to Excel 2007 in the OBIEE did not work in certain cases.
- When using Internet Explorer 11, an error message appeared that the browser is not supported by OBI.
- Analytics reports run from an API did not produce any data. Stability was improved.

Other Analytics Enhancements

- In the Lending Requests subject area, the lending request overdue indicator was added to the Lending Request Details fact table.
- In all subject areas in which the dimension Bibliographic Details appears, **(for future use)** was removed from the **Resource Type**, as this field is now available.
- In the Course Reserves subject area, the **Reading List Owner** field in the Reading List dimension now supports multiple reading list owners. Owners should be separated by semicolons—for example, **Smith, John; Brown, David**.

Alma APIs

For this release, the following APIs were **added**:

- `GET /bibs/{mms_id in the NZ}` – Running this API in the Network Zone retrieves an aggregate list of AVA fields from all members of the collaborative network.
- `GET /conf/md-import-profiles` – Running this API triggers an MD import, for all types of profiles.

  For detailed information on both the above APIs, see **https://developers.exlibrisgroup.com/alma/apis/bibs**.

The following APIs were **changed**:

- The following was added to the retrieve PO lines API (`GET /almaws/v1/acq/po-lines`):
  - A new query parameter `order_by` to enable the ordering of results, which is particularly useful in order to retrieve the newest PO lines first
  - The ability to filter by acquisition method

  For detailed information, see **https://developers.exlibrisgroup.com/alma/apis/acq**
- The request API includes the following new fields (see Copyright Compliance Tracking):
  - `num_copies_for_students`
  - `num_copies_for_staff`
  - `pages_scanned_from`
  - `pages_scanned_to`
  - `date_available_to`
- The citations API includes the following new fields (see Copyright Compliance Tracking):
  - `attach_copyright_record`
  - `num_copies_for_students`
  - `num_copies_for_staff`
  - `pages_scanned_from`
  - `pages_scanned_to`
  - `date_available_to`

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.
- The **Import** button in various code tables in Alma is currently not functional. This issue will be fixed in a future Alma release.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- MARC extensions cannot currently be loaded into authority profiles.
- When creating a bibliographic record using quick cataloging or the Portfolio Loader, the sorting of MMS fields is incorrect when the bibliographic record is opened in View mode. Note that the sorting functions properly when the bibliographic record is opened for editing.
- When contributing portfolios to the Community Zone, only local coverage is contributed when the coverage option selected is **Global and Local**.

Fixed Issues

The following previous known issues were fixed for this release:

- Although resource sharing renewal requests are controlled by a partner's workflow profile, changing the due date using the Change Due Date option is possible even if the workflow profile does not allow this option.
- In the Course Reserves subject area in Analytics, the **Reading List Owner** field in the **Reading List** dimension does not present updated values for any changes made since the June release.