

Alma January 2015 Release:

**Celebrating Simone
de Beauvoir's
birthday**

9th January



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About the Alma Release Notes

Alma release notes provide you with information regarding what you need to get up and running with the new features and enhancements in the latest Alma release.

These release notes include:

- [Alma January 2015 Release Highlights](#)
- [Data Services](#)
- [Alma Show Me How and Videos](#)
- [Particular Issues to Note](#)
- Feature/enhancement descriptions for the respective Alma functional areas
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
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 - [Administration](#)
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 - [Alma APIs](#)
 - [Collaborative Networks and Multicampus Institutions](#)
- [Known Issues](#)

Alma January 2015 Release Highlights

Acquisitions

- Notifying Interested Users of a Subscription Renewal
This feature enables notifying users registered as Interested Users in Alma that a continuous PO line with inventory is sent for manual renewal.
- Support for Accrual Accounting
This feature enables accrual of invoice expenditures from one fiscal period to another. Previously, if an invoice overlapped two different fiscal periods, the entire invoice amount would be attributed to the fiscal year in which the **Subscription from date** is contained. When accrual mode is enabled in Alma, invoice amounts are spread out over all active fiscal periods that the invoice covers.

Resource Management

- Prediction Pattern Support – Inventory Creation
This new feature provides prediction pattern support for better management of serials. With this new functionality, it is possible to create serial items in advance of their receive date based on prediction templates. 853-855 holdings record fields are used for predicted item information such as enumeration, chronology, date, and so forth. Alma also now provides many predictive pattern templates from which you can select to enter the 853-855 field information.
- Title-Level Overlap Analysis
In order to help with acquisition decisions, you can now use the Overlap Analysis tool to upload a list of titles (using an Excel file) that you are considering acquiring in order to determine whether the titles are part of the library collection.
- Relinking a Portfolio to a Different Bibliographic Record
At times, a portfolio is associated with an incorrect descriptive record; or perhaps, there is a better descriptive record for the portfolio. With this new functionality, you can now relink a portfolio to a different bibliographic record.
- Delete Action Added to Digital IE, E-Presentations, and Files
This enhancement allows you to delete digital inventory using the Digital IE Resource Editor or Digital Representation Resource Editor.

Resource Sharing

- New ILL Search Fields

New search fields have been enabled when searching for a borrowing request. The fields can assist in fine-tuning the search for the item on the lender side. The fields are displayed in the resulting lending requests, on reading lists, and in Primo.

- Patron Information Included in Resource Sharing Requests

Patron information can be included when sending a resource sharing request via an ISO partner. This enables institutions to determine the requesting patron when managing borrowing requests.

- Enabling Multiple Resource Sharing Libraries for a Patron

It is now possible to define more than one resource sharing library for a patron. Users can now have up to five different resource sharing libraries be responsible for resource sharing requests initiated by the patron.

Administration

- Link Fees to Physical Items

This feature enables you to manually administer a fine/fee and assign it to a specific item. Previously, items were associated with a particular fine/fee as part of fulfillment workflows.

Analytics

- There are a number of new features and enhancements in Alma Analytics:

- Fulfillment subject area enhancements
- Exchange Rate Detail fields have been added to the Funds Expenditure subject area
- Resource Sharing fields have been added to the Shared User Details dimension
- Fields have been added to the Borrowing and Lending Requests subject area

Collaborative Networks and Multicampus Institutions

- Support Network Zone for Remote Digital Imports

The **Use Network Zone** option has been added to remote digital import profiles. It allows you to import bibliographic records to the Network Zone (NZ) instead of the member institution. When stored in the NZ, a link is created from the member institution to the NZ bibliographic record, but the URL linking information for the remote digital representations is stored in the member institution.

- Coverage Statement Added to 'Available For' Group Information in Staff Search Results

In multicampus and consortial network environments, Alma has been enhanced to include portfolio coverage information as it relates to the Available For group(s) in Repository Search results.

Alma APIs

- Alma RESTful APIs

- All SOAP APIs have been migrated to RESTful APIs and are now considered deprecated.
- A Delete Order API has been added, enabling the cancelation of a PO line via API
- An Update Item API was added, enabling the update of item information, including an item's receive date, via API.

Data Services

The Alma December Central KnowledgeBase and Community Zone package has been applied to the Alma environments.

With the January release, the Community Zone includes the Library of Congress Medium of Performance Thesaurus for Music (LCMPT). For more information, see:

<http://www.loc.gov/catdir/cpso/medprf-list.html>

In addition, the Community Zone is now enriched with bibliographic records from Project Muse, adding 1575 full bibliographic records to the CZ.

New Electronic Collections Added to the Alma CKB

The following electronic collections were added to the Alma CZ during the period 1-December-2014 through 28-December-2014:

- Academie Royale de Belgique Free
- American Society for Microbiology (ASM) Science
- Brill:JISC Collections: Journals Archive:2013-2018
- French National Licences Royal Society of Chemistry
- Institute of Physics - IOP eBooks
- Institution of Civil Engineers Publishing: JISC Collections:Virtual Library Archive (1836-2001)
- Oxford Reference Premium Collection
- Oxford Scholarship - Oxford University Press: Biology
- Oxford Scholarship - Oxford University Press: Business and Management
- Oxford Scholarship - Oxford University Press: Classical Studies
- Oxford Scholarship - Oxford University Press: Economics and Finance
- Oxford Scholarship - Oxford University Press: History
- Oxford Scholarship - Oxford University Press: Law
- Oxford Scholarship - Oxford University Press: Linguistics
- Oxford Scholarship - Oxford University Press: Literature
- Oxford Scholarship - Oxford University Press: Mathematics
- Oxford Scholarship - Oxford University Press: Music

- Oxford Scholarship - Oxford University Press: Neuroscience
- Oxford Scholarship - Oxford University Press: Palliative Care
- Oxford Scholarship - Oxford University Press: Philosophy
- Oxford Scholarship - Oxford University Press: Physics
- Oxford Scholarship - Oxford University Press: Political Science
- Oxford Scholarship - Oxford University Press: Psychology
- Oxford Scholarship - Oxford University Press: Public Health and Epidemiology
- Oxford Scholarship - Oxford University Press: Religion
- Oxford Scholarship - Oxford University Press: Social Work
- Oxford Scholarship - Oxford University Press: Sociology
- Royal Society of Chemistry: JISC Collections:Journals Archive 2005-2007
- Wiso eBooks GRIP
- Wiso eBooks GRIS
- Wiso eBooks GRIW

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

Alma Show Me How and Videos

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

Alma Show Me How – January

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.

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

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

- Create Inventory Using Serial Prediction Patterns
- E-Collection Overlap Analysis Using Input File
- PO Line: Notify User on Subscription Renewal Time
- Relink Electronic Portfolio to Another Bib Record

The following pop-ups are also available:

- New: Attach Portfolio to a Collection (search for any electronic portfolio, then click **Edit** for the portfolio)
- New: Link Inventory to Fee (search for a user, then select **Actions > Edit**. Click the **Fines/Fees** tab. Click **Add Fine or Fee**.)
- New: Link Inventory to Fee – Part 2 (similar to previous, go to the Fines/Fees tab of a user who has a fine/fee)

- New: Filter CZ Updates Task List by Available For (in a multicampus or network environment, Alma Menu > Community Zone Update Tasks List)
- New: "Available For" Indication with Coverage Info (in a multicampus or network environment, search for an electronic portfolio or collection, that has an Available For group)

Alma Videos – January

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

- Linking Fee to Inventory
- Prediction Patterns for Periodical Holdings
- Relink Electronic Portfolio to a Different Bibliographic Record
- Electronic Collection Overlap Analysis Using Input File
- Add a Single Standalone Portfolio to a Collection

Particular Issues to Note

The following should be noted:

- Italian and Korean are now available for both the staff Alma user interface and the patron-facing user interface (notifications, self-check machine messages, Primo Get It, View It, and My Account). To enable working with Alma in Italian or Korean, you must activate the Italian or Korean language by selecting the appropriate check mark in the InstitutionLanguages mapping table's **Enabled** column (**Administration > General Configuration > Configuration Menu > General Configuration > Institution Languages**) and clicking **Save**. Note that once Italian or Korean is enabled, all patrons whose preferred language is defined as Italian or Korean will be exposed to Alma patron-facing interface elements in Italian or Korean.
- A new **Alma Release Schedule** option, listing the schedule for Alma releases in 2015, was added under the **Help** menu in Alma.
- Following additional testing (which did not yield satisfying results), it was decided to disable the Recalculate PO Lines Encumbrance Based on Current Exchange Rate job and redesign it for a future release in order to improve the job's functionality.

Acquisitions

The following sections describe the features provided for the Acquisitions functional area in the January 2015 release of Alma.

Notifying Interested Users of a Subscription Renewal

Description

This feature enables notifying users registered as interested users in Alma that a continuous PO line with inventory is sent for manual renewal.

Technical Instructions

The following roles can notify an interested user that a continuous PO line is sent for manual renewal:

- Purchasing Operator
- Purchasing Manager

To configure an interested user to be notified of manual renewal:

- 1 On the PO Lines to Renew page (**Acquisitions > Purchase Order Lines > Renew**), locate a PO line that displays the **Edit** link.

PO Lines to Renew

Limit results to:

Alert

[Open claims exist for this PO line \(3\)](#)
[Mandatory information is missing or erroneous \(2\)](#)
[Duplicate active orders \(10\)](#)
[The bib record is part of a series/book set \(1\)](#)
[More \(5\) ▾](#)

Library

[Art Library \(3\)](#)
[Main Library \(15\)](#)

Renewal Date

[Undefined \(2\)](#)
[Earlier than Today \(16\)](#)

Vendor

[AutoQA Vendor \(1\)](#)
[Swets EDI \(5\)](#)
[Auto QA Vendor \(1\)](#)
[Blackwell \(3\)](#)
[More \(2\) ▾](#)

Acquisition Method

[Purchase \(15\)](#)
[Technical \(3\)](#)

Purchase Type

[Physical - Subscription \(4\)](#)
[Electronic Journal - Subscription \(1\)](#)

Find : _____ in: All

1 2 |> |>> |>>> Go 1 - 15 of 18 Records

1 **03012012 054031 Barnes & Noble Library of Essential Reading., Barnes & Noble., 2005., 9780760765455 (Paperback), ISBN**
Assigned to: -
Type: Print Journal - Subscription Standard number: 9780760765455 (Paperback) Order/Line: [PO-503](#) / [POL-803](#)
Copies: - Total price: 90.00 USD Funds: Accounting and Finance E-resources (111.11%) (31/12/2011 - 29/12/2012)
Vendor/Account: O'niel / Ebsco - Main Library 0-123-123 Vendor reference ID: - Expected delivery: 01/14/2012
Renewal date: 01/07/2013 Receiving note: - Sent Date: 01/09/2012 [Has interested users](#)
Duplicate active orders
[Edit](#) | [Relink](#) | [Change Bib Reference](#) | [Close](#) | [Cancel](#)

2 **03012012 054031 Barnes & Noble Library of Essential Reading., [S.I.], Barnes & Noble., 2005., 9780760765455 (Paperback), ISBN**
Assigned to: -
Type: Print Book - Standing Order Standard number: 9780760765455 (Paperback) Order/Line: [PO-502](#) / [POL-802](#)
Copies: - Total price: 90.00 USD Funds: -
Vendor/Account: O'niel / Ebsco - Main Library 0-123-123 Vendor reference ID: - Expected delivery: 01/13/2012
Renewal date: 01/10/2013 Receiving note: BAL:UARCVC(1) Sent Date: 01/09/2012
Open claims exist for this PO line, Items already exist in the repository, Duplicate active orders, Overdue PO line
[Edit](#) | [Relink](#) | [Change Bib Reference](#) | [Close](#) | [Cancel](#)

3 **281013132600 No Inventory CO, 281013132600 No Inventory CO Alt, 281013132600 No Inventory CO Description**
Assigned to: -
Type: Other Service - Subscription Standard number: - Order/Line: [PO-25426](#) / [POL-63123](#)
Total price: 100.11 USD Funds: QA Fund Auto3 (100.0%) (01/01/2013 - 30/12/2013)
Vendor/Account: Auto QA Vendor / AutoQA Vendor Account description AutoQaVendorAcc Vendor reference ID: -
Renewal date: 10/28/2013 Sent Date: 10/28/2013
Reporting code is missing
[Edit](#) | [Close](#) | [Cancel](#)

4 **A concise encyclopedia of the United Nations (Brill Martinus Nijhoff E-Books International Law Collection), BRILL, 2010, 90-474-4454-X, ISBN**
Assigned to: -
Type: Electronic Journal - Subscription Standard number: 90-474-4454-X Order/Line: [PO-21127](#) / [POL-31625](#)
Total price: 100.00 USD Funds: Accounting and Finance E-resources (100.0%) (01/01/2013 - 30/12/2013)
Vendor/Account: AutoQA_0103120342 / AutoQA Vendor Account description AutoQaAcc_0103120342 Vendor reference ID: - Expected activation: 05/02/2013
License status: - Activation status: Not Activated E-Resource Renewal date: 05/31/2013 Sent Date: 05/02/2013
Reporting code is missing
[Edit](#) | [Start a trial](#) | [Request Evaluation](#) | [Change Bib Reference](#) | [Close](#) | [Cancel](#) | [Download EDI File](#)

Figure 1 – PO Lines to Renew Page — Edit Link

2 Click Edit. The PO Line Summary page opens.

PO Line Summary [Back to PO Line list](#)

Description [03012012_054031 Barnes & Noble Library of Essential Reading... Barnes & Noble... 2005... 9780760765455 \(Paperback\). ISBN](#) Order/Line [PO-503/ POL-803](#) Status [Waiting for Manual Renewal \(2012-01-09\)](#)
 Order line type [Print Journal - Subscription](#) PO Line Owner [Main Library](#) Sent Date [01/09/2012](#)

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users His
 Notes Attachments

Ordered items

Quick Add

Number of holdings to create* Library/Location

No records were found.
 Receiving note

Vendor information

Material Supplier* [O'niel \(0-123\) Ebsco - Main Library \(0-123-123\)](#)
 Claiming grace period (days) Expected receipt after ordering (days)
 Or expected receipt date Subscription interval

Pricing

List Price* USD Net price USD
 Quantity for pricing* Discount (%)

Funding

Quick Add

Fund Percent Amount USD

Figure 2 – PO Line Summary Page

3 Click the **Interested Users** tab. The Interested Users page opens.

Interested Users [Back to PO Line list](#)

Description [03012012_054031 Barnes & Noble Library of Essential Reading... Barnes & Noble... 2005... 9780760765455 \(Paperback\). ISBN](#) Order/Line [PO-503/ POL-803](#) Status [Waiting for Manual Renewal \(2012-01-09\)](#)
 Order line type [Print Journal - Subscription](#) PO Line Owner [Main Library](#) Sent Date [01/09/2012](#)

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes
 Attachments

Add Interested Users

Search for a user Notify user upon receiving/activation Hold item Notify upon renewal

Name	Email	Notify user upon receiving/activation	Hold item	Notify upon renewal	Delete
1 Ex Libris, Implementor Main campus	auto.test@maincampus.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>

Figure 3 – PO Line Summary Page

4 In the **Add Interested Users** section, search for a user in the **Search for a user** field.

5 Select the relevant check box:

- **Notify user upon receiving/activation** — Sends the user an email when the item arrives at the library's receiving department.

- **Notify upon renewal** — Sends the user an email when the order is sent to manual renewal.

An email is sent to the interested user only when one of these check boxes is selected and an email address is configured for the user.

- 6 Click **Add User**. The user displays in the table, with the relevant options selected accordingly.

The screenshot shows the 'Interested Users' page for a specific order line. The order details include: Description: 03012012_054031 Barnes & Noble Library of Essential Reading...; Order/Line: PO-503/ POL-803; Status: Waiting for Manual Renewal (2012-01-09); Sent Date: 01/09/2012. The page has several tabs: Summary, Description, Alerts, Invoice Lines, Associated PO Lines, Communications, Interested Users, History, and Notes. The 'Interested Users' tab is active, showing a search bar and options to 'Notify user upon receiving/activation' (checked), 'Hold item' (unchecked), and 'Notify upon renewal' (checked). Below this is a table of interested users:

Name	Email	Notify user upon receiving/activation	Hold item	Notify upon renewal
1 Ex Libris, Implementor Main campus	auto.test@libris.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Marsha, Brady	brady.marsha@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 4 – Interested Users Page

The specified users receive email notification according to the check box selected in the table.

Support for Accrual Accounting

Description

This feature enables accrual of invoice expenditures from one fiscal period to another, in institutions that practice accrual accounting.

Previously, if an invoice overlapped two different fiscal periods, the entire invoice amount would be attributed to the current fiscal period — that is, the fiscal period in which the current calendar date is contained. When accrual mode is enabled in Alma, invoice amounts are spread out over all active fiscal periods, beginning with the fiscal period in which the **Subscription from date** is contained.

For example:

- A fiscal year is set in Alma that runs from January 1, 2014 – December 31, 2014, called **FY - 2014**.
- Another fiscal year is set in Alma that runs from January 1, 2015 – December 31, 2015, called **FY - 2015**.

An invoice covers the fiscal period from June 1, 2014 – May 31, 2015. This means that 54.55% of the invoice's fiscal period is in FY – 2014, and 45.45% of the invoice's fiscal period is in FY – 2015.

- If Accrual Mode is disabled: All of the invoice's charges are attributed to the current fiscal year (FY – 2014), regardless of the invoice's **Subscription from date** value.
- If Accrual Mode is enabled: The invoice's charges are distributed proportionally between FY – 2014 and FY – 2015.

Note: If a future fiscal year is not active in Alma (or if the fund does not exist), the invoices' expenditures are attributed to the latest active fiscal period in Alma that is covered by the invoice. In the above example, if FY – 2015 was not active, all of the invoice's expenditures would be attributed to FY – 2014, even if accrual mode is enabled.

Accrual accounting takes effect only on expenditures, and not on encumbrances.

Technical Instructions

The following roles can enable working with accrual accounting:

- Acquisitions Administrator
- General System Administrator

The following roles can enable accrual mode for an invoice line:

- Invoicing Manager
- Invoicing Operator

To enable an institution to work with accrual accounting:

- 1 On the CustomerParameters Mapping Table (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**), locate the **acquisition_accrual_mode** setting.

Mapping Table				
You are configuring: Alma University				
Table Information				
Sub System			INFRA	Table Name
Updated By			-	CustomerParameter
Table Description			Customer Parameters	
- Mapping Table Rows				
	parameter key	parameter module	parameter value	free text description
1	acquisition_accrual_mode	acquisition	true	
2	assertion_over_po_line_price	acquisition	850	
3	auto_claim	acquisition	Y	Send Claim notifica
4	expended_from_fund_default	acquisition	true	
5	exportPrepaidInv	acquisition	false	Invoice to be export
6	handle_invoice_payment	acquisition	true	
7	invoice_allow_vat_in_line_level	acquisition	true	

Figure 5 – CustomerParameters Mapping Table Page — acquisition_accrual_mode Setting

- 2 Click **Customize**.
- 3 In the **parameter value** column, set the value to **true**.
- 4 Click **Save**.

To enable accrual mode for an invoice line:

- 1 On the Invoice Details Page (**Acquisitions > Receiving and Invoicing > Create Invoice**, select **Manually** and click **Next**), configure the relevant fields to create an invoice.

Invoice Details		1 2 Back Cancel Save and Create Invoice Lines	
Invoice Number *	<input type="text"/>	Invoice Date *	<input type="text"/>
Total amount *	<input type="text"/> AUD	Total invoice lines amount	0.00 AUD
Vendor *	<input type="text"/>	Vendor account	<input type="text"/>
Vendor Contact Person	<input type="text"/>	Payment method	Accounting Department
Invoice Reference #	<input type="text"/>	Creation From	Manually
Additional Charges			
Use Pro rata	<input type="checkbox"/>		
VAT			
Report Tax	<input type="checkbox"/>		
VAT per invoice line	<input type="checkbox"/>		
VAT Code	<input type="text"/>	Update Amount	<input type="text"/>
VAT %	0.0	VAT Type	Inclusive
Amount	0.0	Expended from fund	<input checked="" type="checkbox"/>
Vendor tax (local currency)	<input type="text"/>		
+ Explicit Ratio			
Payment			
Prepaid	<input type="checkbox"/>		

Figure 6 – Invoice Details Page

- 2 Click the **Save and Create Invoice Lines** button. The Invoice Lines tab of the Invoice Details page displays the invoice lines:

Invoice Details						
<p>Invoice: TestAccrual7, was updated and in status: InReview</p>						
<p>Invoice Number TestAccrual7</p>			<p>Unique Invoice Identifier 964132550000121</p>			
<p>Summary Alerts Invoice Lines Notes Attachments</p>						
<p>Status All Type All</p>						
<p>Add Invoice Line</p>						
Line #	Type	Price	Total Price	VAT Note	Status	Description
1 999991	Shipment	0.00 AUD	0.00 AUD	-	In-Review	-
2 999992	Discount	0.00 AUD	0.00 AUD	-	In-Review	-
3 999993	Overhead	0.00 AUD	0.00 AUD	-	In-Review	-
4 999994	Insurance	0.00 AUD	0.00 AUD	-	In-Review	-

Figure 7 – Invoice Details Page — Invoice Lines

3 Click **Add Invoice Line**. The Add Invoice Line dialog box opens.

Add Invoice Line

Type: Regular Line Number: 1

PO line:

Price: AUD

Total Price: 0.00 AUD

Quantity: VAT Note: -

Reporting Code:

Note:

Invoice amount: 100.00 AUD Total invoice lines amount: -

Quick Add

Fund*: Percent: Amount: AUD **Add Fund**

No records were found.

Close **Add** **Add and Close**

Figure 8 – Add Invoice Line Dialog Box

4 In the **PO line** field, select a continuous PO line. The dialog box refreshes with the **Accrual Mode** check box selected.

Add Invoice Line

Type: Regular Line Number: 1
 PO line: POL-6207 [More Information](#)
 Title: EBSCOhost Academic Source Complete
 PO line price: 900.00 AUD
 Check subscription date overlap:
 Accrual Mode:
 PO Line Subscription from date: - PO Line Subscription to date: -
 Subscription from date: * Subscription to date: *
 No records were found.
 Additional Information:
 Price: 900.00 AUD Release remaining encumbrance:
 Total Price: 900.00 AUD
 Quantity: 1 VAT Note: -
 Reporting Code:
 Note:
 Invoice amount: 500.00 AUD Total invoice lines amount: -

Quick Add

Fund*	Percent	Amount	
<input type="text"/>	100.0	900.00 AUD	Add Fund

No records were found.

[Close](#) [Add](#) [Add and Close](#)

Figure 9 – Add Invoice Line Dialog Box — Accrual Mode Check Box

- 5 In the **Subscription from date** and **Subscription to date** fields, select a starting date and ending date for the invoice line, respectively. The distribution of the expenditures among the relevant fiscal periods appears.

Add Invoice Line

Type: Regular Line Number: 1
 PO line: POL-6207 [More Information](#)
 Title: EBSCOhost Academic Source Complete
 PO line price: 900.00 AUD
 Check subscription date overlap:
 Accrual Mode:
 PO Line Subscription from date: - PO Line Subscription to date: -
 Subscription from date: * 06/01/2014 Subscription to date: * 05/31/2015

Fiscal Period	Percent
1 FY - 2014	54.55%
2 FY - 2015	45.45%

Additional Information:
 Price: 900.00 AUD Release remaining encumbrance:
 Total Price: 900.00 AUD
 Quantity: 1 VAT Note: -
 Reporting Code:
 Note:

Invoice amount: 500.00 AUD Total invoice lines amount: -

Quick Add

Fund*	Percent	Amount	
<input type="text"/>	100.0	900.00 AUD	<input type="button" value="Add Fund"/>

No records were found.

[Close](#)

Figure 10 – Add Invoice Line Dialog Box – Fiscal Period Distribution

The above image indicates that 54.55% of the invoice line’s expenditures fall in Fiscal Period **FY – 2014**, and 45.45% of the invoice line’s expenditures fall in Fiscal Period **FY – 2015**.

- In the **Quick Add** section, select a fund in the **Fund** field.

Note: You must configure the fund of a fiscal period to accept expenditure transactions prior the start of the fiscal period to enable the fund to work in accrual mode. Ensure that you have selected a value in the **Expenditures prior to fiscal period (days)** field in the **Rules** section of the Summary Details page for the specified fund.

- Click **Add Fund**. The accrued amounts display in the **Accrued Amount** column, according to the displayed percentages (as described in Step 5 above).

Add Invoice Line

Type: Regular Line Number: 1

PO line: POL-6207 [More Information](#)

Title: EBSCOhost Academic Source Complete

PO line price: 900.00 AUD

Check subscription date overlap:

Accrual Mode:

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

Subscription from date: * 06/01/2014 Subscription to date: * 05/31/2015

Fiscal Period	Percent
1 FY - 2014	54.55%
2 FY - 2015	45.45%

Additional Information:

Price: 900.00 AUD Release remaining encumbrance:

Total Price: 900.00 AUD

Quantity: 1 VAT Note: -

Reporting Code:

Note:

Invoice amount: 500.00 AUD Total invoice lines amount: -

Quick Add

Fund: Percent: 0.0 Amount: 0.00 AUD [Add Fund](#)

#	Fund Name	Percent	Amount	Accrued Amount	
1	Accounting Serials (FY - 2014) <small>(99,730.00 AUD)</small>	100.0%	900.0	490.91 AUD	Delete
2	Accounting Serials (FY - 2015) <small>(1,980.00 AUD)</small>	-	-	409.09 AUD	
3	Total	100.0%	900.0	900.00 AUD	

[Close](#) [Add](#) [Add and Close](#)

Figure 11 – Add Invoice Line Dialog Box — Accrued Amounts

The fund that covers the Fiscal Period in the **Subscription from date** is called the Baseline Fund. The **Delete** button appears next to this fund only. Clicking **Delete** deletes this fund both accrued amounts covered by this fund.

Note: To disable accrual mode, clear the **Accrual Mode** check box. The amounts then exist independently in the invoice line, and a **Delete** button displays next to each. Additionally, the **Accrued Amount** heading changes to **Amount**.

Invoice amount 500.00 AUD Total invoice lines amount -

Quick Add

Fund Percent 0.0 Amount 0.00 AUD

#	Fund Name	Percent	Amount		
1	Accounting Serials (FY - 2014) (99,730.00 AUD)	54.55%	490.91	AUD	Delete
2	Accounting Serials (FY - 2015) (1,980.00 AUD)	45.45%	409.09	AUD	Delete
3	Total	100.0%		900.00 AUD	

Figure 12 – Accrual Mode Disabled

8 Click Add and Close.

Other Acquisitions Enhancements

- The Tasks list now contains an **Order lines – Waiting for renewal** link, which links to the PO Lines to Renew page.
- An Acquisitions Administrator can now delete the PO line templates of other users.
- The following three payment methods have been added: **Prepayment**, **Special Payment** and **Attachment**. They can be enabled in the Payment Method Code Table (**Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Payment Method**).

Resource Management

The following sections describe the functions provided for the Resource Management functional area in the January 2015 release of Alma.

Prediction Pattern Support – Inventory Creation

Description

With the January release Alma provides prediction pattern support to enable you to more easily manage serials. With prediction pattern support, it is possible to create serial items in advance of their receive date based on a prediction template.

This new capability uses the 853-855 holdings record fields for the predicted item information such as enumeration, chronology, date, and so forth. With this feature, Alma provides many predictive pattern templates from which you can select to enter the 853-855 field information.

Once you have created the predicted items, they can be viewed using the Acquisitions Received Items List to manage their receipt. Refer to the *Enhancements to Support the Receiving of Continuous Orders* section in the Alma December 2014 release notes.

Technical Instructions

The following roles can create and edit predictive pattern elements:

- Cataloger
- Catalog Manager
- Catalog Administrator
- Physical Inventory Operator

To create a holdings record with predictive pattern content:

- 1 Locate the holdings record (connected to a physical subscription order type) to which you want to add the predictive pattern information and open it in the MD Editor.

(The order provides the vendor **Subscription interval** information that is used in combination with the **Next Predict's Item Information** (see below) to calculate the expected arrival date information.)

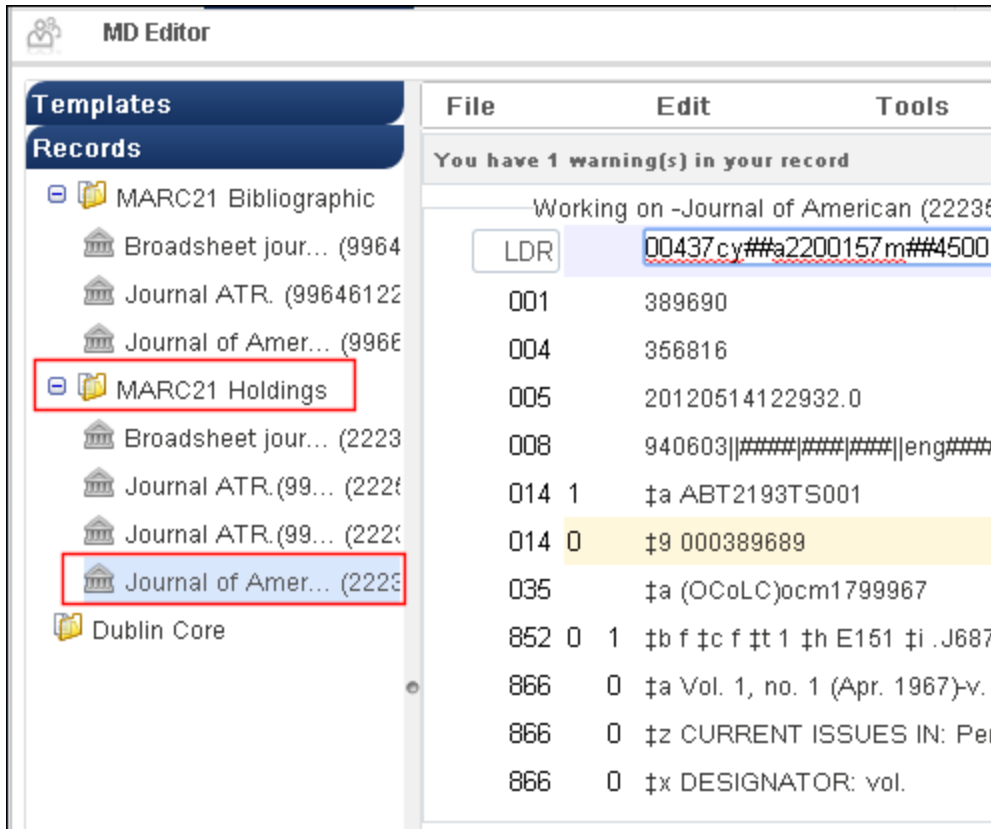


Figure 13 - Open Holdings Record

- 2 Select **Edit > Expand from Template**, select a relevant predictive pattern template that fits your requirements from the ones provided in Alma, and click **OK**.

Since the journal used in this procedure is a quarterly publication, the **Serial prediction quarterly months** template is selected.



Figure 14 - Quarterly Publication

Expand from Template	
Choose	Serial prediction quarterly months
Template:	Serial prediction combined chron quarterly
	Serial prediction combined chron semiannual
	Serial prediction daily
	Serial prediction daily 6 levels
	Serial prediction lacks a top level of enumeration and has continuous iss
	Serial prediction monthly combined using 853
	Serial prediction monthly omits
	Serial prediction monthly regular
	Serial prediction quarterly combine
	Serial prediction quarterly months
d in profile fo	Serial prediction quarterly seasons
	Serial prediction semiannual alternative enumeration
	Serial prediction semiannual continuous issue numbering
	Serial prediction semimonthly
	Serial prediction semimonthly 4 levels
	Serial prediction semiweekly
	Serial prediction three 853 fields
	Serial prediction triennial
	Serial prediction two 853 fields
	Serial prediction weekly

Figure 15 - Expand from Template Predictive Pattern Options

The system adds an 853 field row (or 854/855 field depending on which template you selected) to the holdings record and a 590 field row that contains a description of the template.


File	Edit	Tools
You have 5 warning(s) in your record - Draft auto-saved at 14:56:45.		
Working on -Journal of American (222359027010001041), Created by import (0' EST)		
LDR	00437cy###a2200157m###4500	
001	389690	
004	356816	
005	20120514122932.0	
008	940603 #### ### ### eng#####	
014 1	‡a ABT2193TS001	
014 0	‡9 000389689	
035	‡a (OCoLC)ocm1799967	
852 0 1	‡b f ‡c f ‡t 1 ‡h E151 ‡i .J687	
866 0	‡a Vol. 1, no. 1 (Apr. 1967)-v. 45, no. 4 (Nov. 2011)	
866 0	‡z CURRENT ISSUES IN: Periodicals Reading Room (PR). Firest	
866 0	‡x DESIGNATOR: vol.	
 853	‡8 1 ‡a v. ‡b no. ‡u 4 ‡v r ‡i (year) ‡j (month) ‡w q	
590	‡a A quarterly publication that begins with v.1:no.1(2015:Jan.) and second level of chronology.	

Figure 16 - 853 Rows Added to the Holdings Record

Optionally, you can manually enter the 853/854/855 field. You can also create your own custom prediction pattern template, a new one or by duplicating an existing prediction pattern template and modifying the duplicate.

- 3 Click the magnifying glass icon in the 853 (or 854/855) row to open the form with the next predicted item's information. You can also click **F3** to open the form when the 853 (or 854/855) is the active row or you can select **Tools > MARC21 Holdings > Next predicted item's information**. (You can also use F3 to open the form when you have manually entered the 853/854/855 field and no magnifying glass icon is displayed.)

Next predicted item's information

First level of enumeration(a)

Second level of enumeration(b)

First level of chronology(i)

Second level of chronology(j)

Issue Date

Figure 17 - Next Predicted Item's Information

- 4 Make any changes you may require for the next predicted item and click **Close**. Your entries on this form determine the beginning of the prediction pattern starting with the next predicted item. Clicking **Remove** clears the form.
- 5 Select **Tools > MARC21 Holdings > Open predicted item** to view the pattern that Alma has created for this holdings record. The predicted pattern that is created includes the expected arrival date (refer to the figure below).

Each prediction cycle is for one year. If you want to create predicted items for more than one year, you can repeat the **Open predicted item** step.

Predicted Items			
	Description	Status	Expected Arrival Date
1	v.1:no.1(2015:Jan.)	Item not in place	2014-12-19
2	v.1:no.2(2015:Feb.)	Item not in place	2015-01-19
3	v.1:no.3(2015:Mar.)	Item not in place	2015-02-19
4	v.1:no.4(2015:Apr.)	Item not in place	2015-03-19
5	v.1:no.5(2015:May)	Item not in place	2015-04-19
6	v.1:no.6(2015:June)	Item not in place	2015-05-19
7	v.1:no.7(2015:July)	Item not in place	2015-06-19
8	v.1:no.8(2015:Aug.)	Item not in place	2015-07-19
9	v.1:no.9(2015:Sept.)	Item not in place	2015-08-19
10	v.1:no.10(2015:Oct.)	Item not in place	2015-09-19

Figure 18 - Predicted Items Created

- 6 Click **Save** to save the predicted items that have been created, or click **Discard** if you do not want to save the predicted items. This closes the Predicted Items form.
- 7 Click the **Save Record** icon when you have completed making your changes.

To view the holdings changes that you have made after creating predicted items:

- 1 In the MD Editor, open the bibliographic record that has the holdings for which you created the predicted items.
- 2 Click **View Inventory** (**Tools > MARC21 Bibliographic > View Inventory**).

The predicted items that you created increment the **No. of Items** total that displays on the **Holdings** tab in the MD Editor (**Tools > MARC Bibliographic > View Inventory**) for the bibliographic record of this continuous holdings record.

Holding(1)	Portfolio(0)	Representation(0)	Electronic Collection(0)
1 Library: Firestone Library (F) Location: flm Firestone Microforms Call Number: MICROFILM S00421 No. of items: 13 Available: 1 View Edit View Items			

Figure 19 - Number of Items Increments for Bibliographic Record Holdings

- 3 Click **View Items**.

The four predicted items of the cycle (quarterly per year) have been created with no receiving date (because they have not yet been received).

List of Items Back

Resource description [Journal Journal \(Association of Teachers of Russian \(Great Britain\)\) Association of Teachers of Russian \(Bradford\) : No. 8 \(Dec. 1962\)-no. 17 \(summer 1968\).](#)

Location [Firestone Library \(F\): flm Firestone Microforms: MICROFILM S00421](#) [View all holdings](#)

List of Items

Sort routine Library/Location

Status All Find: _____ in: Bar code Go

[Add Item](#) [Bind Items](#) [Move Items](#) [Open Predicted Items](#) Go 1 - 20 of 25 Records Tools

	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date	Actions
1	32101070291610	Firestone Library (F)	flm Firestone Microforms	MICROFILM S00421	1962-1968	No	Item in place	-	-	-	Actions
2	-	Firestone Library (F)	flm Firestone Microforms	MICROFILM S00421	v.1:no.12(2015:Dec.)	No	Item not in place	-	-	-	Actions
3	-	Firestone Library (F)	flm Firestone Microforms	MICROFILM S00421	v.1:no.11(2015:Nov.)	No	Item not in place	-	-	-	Actions
4	-	Firestone Library (F)	flm Firestone Microforms	MICROFILM S00421	v.1:no.10(2015:Oct.)	No	Item not in place	-	-	-	Actions

Figure 20 - View Items Created by Prediction Pattern (4 for this Quarterly Example)

While viewing the details of this page, also observe the new Open Predicted Items button that can be used to create another cycle of predicted items.

- For one of the predicted items, select **Actions > Edit** to open the **Physical Item Editor** page and observe the **Expected receiving date** that has been set by the prediction pattern.

Summary	General Information	ENUM/CHRON information	Notes	History
Barcode	BC526794	Copy ID		
Material type	Issue	Item policy		
Inventory date		Provenance		
Holding PO Line	15-299803	Is Magnetic		
Receiving date		Expected receiving date	31/10/2015	
Enumeration A	12	Enumeration B	4	
Chronology I	2015	Chronology J		
Description	v.12:no.4(2015)	Generate Clear		

Figure 21 - Expected Receiving Date

To create additional predicted items using the Open Predicted Items button from the List of Items page using Repository Search:

- 1 Using Repository Search, enter the search criteria for the record to which you want to create an additional cycle of predicted items, and click the **Items** link.

1 **Journal ATR.**
Journal ([Bradford] : Association of Teachers of Russian No. 8 (Dec. 1962)-no. 17 (summer 1968).)
Language: English **Medium Type:** [microform] / **Record number:** (NjP)964218-
Availability: [Physical version](#) at **f: flm; MICROFILM S00421** No. 8 (Dec. 1962)-no. 17 (summer 1968)
[Holdings](#) | [Items](#) | [Edit](#) | [Order](#) | [Request](#) | [Publishing information](#) | [More info](#)

Figure 22 - Search Results

The List of Items Page opens with the new **Open Predicted Items** button.

The screenshot shows the 'List of Items' interface. At the top, there is a 'Resource description' for 'Journal Journal (Association of Teachers of Russian (Great Br Russian [Bradford] : No. 8 (Dec. 1962)-no. 17 (summer 1968))'. Below this, the 'Location' is listed as 'Library: flm; S00421'. A 'List of Items' section contains a 'Sort routine' dropdown set to 'Library/Locat' and a 'Status' dropdown set to 'All'. A row of buttons includes 'Add Item', 'Bind Items', 'Move Items', and 'Open Predicted Items', with the latter highlighted by a red box. Below the buttons is a table with the following data:

	Barcode	Library	Location	Call Number	Description
1	32101070291610	Library	flm	S00421	1962-1968

Figure 23 - List of Items Page for Holdings with Predicted Items

2 Click **Open Predicted Items**. The list of new Predicted Items opens.

Predicted Items

Holdings Information

Library Library

Location flm

Call Number S00421

Tools

	Description	Status	Expected Arrival Date
1	v.2:no.1(2016:Jan.)	Item not in place	12/19/2015
2	v.2:no.2(2016:Feb.)	Item not in place	01/19/2016
3	v.2:no.3(2016:Mar.)	Item not in place	02/19/2016
4	v.2:no.4(2016:Apr.)	Item not in place	03/19/2016
5	v.2:no.5(2016:May)	Item not in place	04/19/2016
6	v.2:no.6(2016:June)	Item not in place	05/19/2016
7	v.2:no.7(2016:July)	Item not in place	06/19/2016
8	v.2:no.8(2016:Aug.)	Item not in place	07/19/2016
9	v.2:no.9(2016:Sept.)	Item not in place	08/19/2016
10	v.2:no.10(2016:Oct.)	Item not in place	09/19/2016
11	v.2:no.11(2016:Nov.)	Item not in place	10/19/2016
12	v.2:no.12(2016:Dec.)	Item not in place	11/19/2016

Tools

Discard **Save Items**

Figure 24 - Predicted Items List from Repository Search Results List of Items Page

The **Tools** feature for this list provides you the option to view/save the list in Excel format.

	A	B	C
1	Description	Status	Expected Arrival Date
2	v.2:no.1(2016:Jan.)	Item not in place	12/19/2015
3	v.2:no.2(2016:Feb.)	Item not in place	01/19/2016
4	v.2:no.3(2016:Mar.)	Item not in place	02/19/2016
5	v.2:no.4(2016:Apr.)	Item not in place	03/19/2016
6	v.2:no.5(2016:May)	Item not in place	04/19/2016

Figure 25 - Predictive Pattern List in Excel

- 3 Click **Save Items** to save the predicted items and close the list.
- 4 Click **Back** to return to your search results page.

To process/manage receiving predicted items:

- 1 Open the **Receive New Material** page (**Acquisitions > Receiving and Invoicing > Receive**), and select the **Continuous** tab.
- 2 Filter the **Receive New Material** page to locate the PO line that contains the predicted item(s) you want to receive.
- 3 For the PO line containing the predicted item(s), select **Actions > Manage Items**. The **Received Items List** page opens.

The screenshot shows the 'Received Items List' page. At the top, there is a description: 'Journal of American studies., Cambridge University Press for the British Association for American Studies, ISSN 0021-8758'. The status is 'Waiting for Renewal (2013-01-28)' and the order line type is 'Print Journals'. Below this is a section for 'Bibliographic Information' with fields for Title, Identifier, Vendor's Title Number, Publisher, Frequency, and Language. Underneath is the 'PO line Items' section, which includes a 'Receiving note' field, a 'Sort routine' dropdown menu set to 'Library/Location', and 'Receiving status' and 'Location' filters both set to 'All'. A 'Receive New Items' button is also present. At the bottom, a table lists two PO line items, both for 'Firestone Library (F)' at 'f Firestone Library' with a 'Temp Loc' of 'No'.

	<input type="checkbox"/>	Library	Location	Temp Loc	Date Received	Modified
1	<input type="checkbox"/>	Firestone Library (F)	f Firestone Library	No	12/20/2014	12/20/2014
2	<input type="checkbox"/>	Firestone Library (F)	f Firestone Library	No	-	12/20/2014

Figure 26 - Received Items List Page

When receiving and managing items, you can tell which items have already arrived and which are still waiting to arrive by reviewing the new **Date Received** column.

	<input type="checkbox"/>	Library	Location	Temp Loc	Date Received	Modified
1	<input type="checkbox"/>	Firestone Library (F)	f Firestone Library	No	12/20/2014	12/20/2014
2	<input type="checkbox"/>	Firestone Library (F)	f Firestone Library	No	-	12/20/2014

Figure 27 - Date Received Column

- 4 Use the **Sort routine**, **Receiving status**, and **Location** options in the **PO Line Items** section to organize and locate the predict item(s) to be received. (Refer to the *Enhancements to Support the Receiving of Continuous Orders* section in the Alma December 2014 release notes for more information.)
 - a Select **Receiving date** from the drop-down list for **Sort routine**.
 - b Select **Not Received** for the **Receiving Status**.
 - c Select the specific location/library for **Location**.

The screenshot shows the 'Received Items List' interface. At the top, the 'Description' is 'Journal of American studies., Cambridge University Press 8758, ISSN'. Below this, the 'Status' is 'Waiting for Renewal (2013-01-28)' and the 'Order line type' is 'Pr'. A section titled 'Bibliographic Information' contains the following details: Title: Journal of American studies., Identifier: 0021-8758, Vendor's Title Number: -, Publisher: Cambridge University Press for the Association for American Studies, Frequency: Quarterly, Language: eng. Below this is the 'PO line Items' section, which is highlighted with a red box. It contains a 'Receiving note' field with a hyphen, a 'Sort routine' dropdown menu set to 'Receiving date', a 'Receiving status' dropdown menu set to 'Not Received', and a 'Location' dropdown menu set to 'f Firestone Library-f'.

Figure 28 - Sort/Filter Options Selected

- 5 Select **Actions >Receive** for a specific predicted item, or select the check boxes for multiple rows, and click the **Save and Receive** button that has been added that allows you to save and receive multiple items.
- 6 Repeat the receiving steps until you have completed receiving the predicted item(s).

Relinking a Portfolio to a Different Bibliographic Record

Description

At times a portfolio is associated with an incorrect descriptive record; or perhaps, there is a better descriptive record for the portfolio. With this new functionality, you can now relink a portfolio to a different bibliographic record.

This functionality applies to:

- Local standalone portfolios
- Portfolios that are part of a Community Zone collection or a local collection

Technical Instructions

The following role can relink a portfolio to a different bibliographic record:

- Electronic Inventory Operator

To relink a portfolio to a different bibliographic record:

- 1 Using Repository Search, locate the portfolio that you want to relink and open it in the Electronic Portfolio Editor.
- 2 Click the **Relink to Another Bibliographic Record** button.

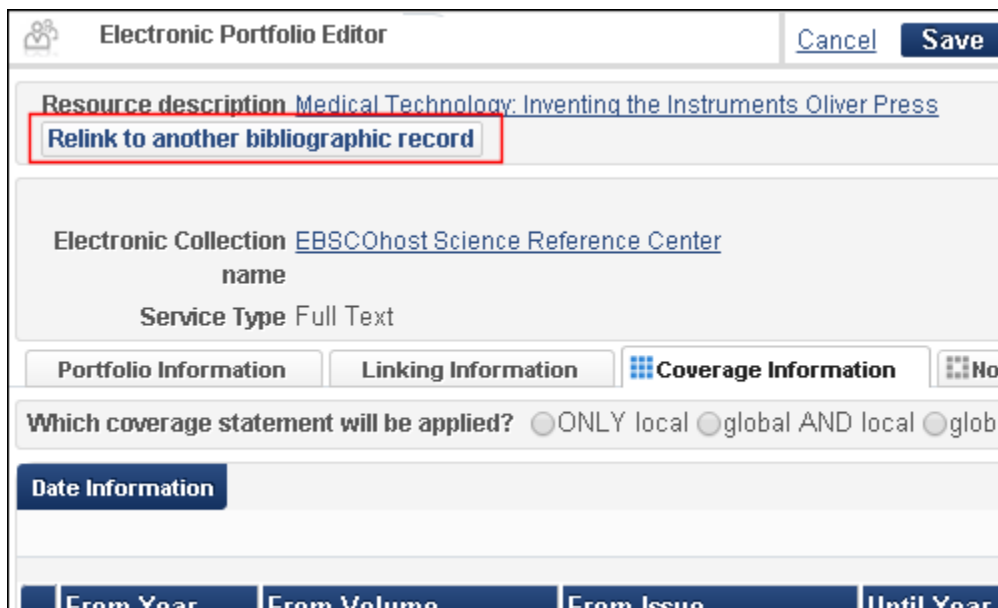


Figure 29 - Relink to Another Bibliographic Record

The Relink Confirmation dialog box opens.

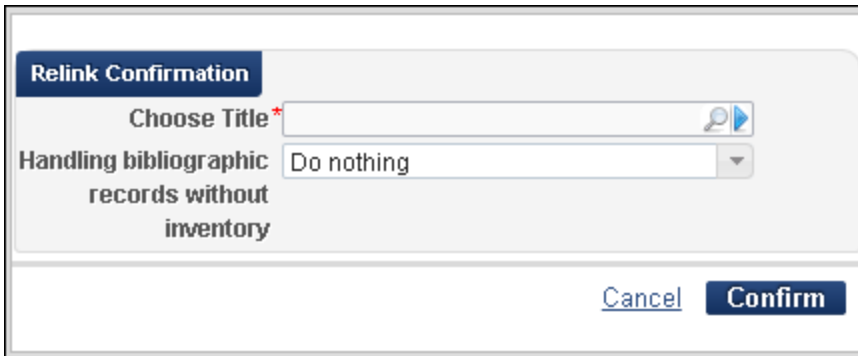


Figure 30 - Relink Confirmation Dialog Box

3 Browse for the bibliographic record to which you want to relink the portfolio.

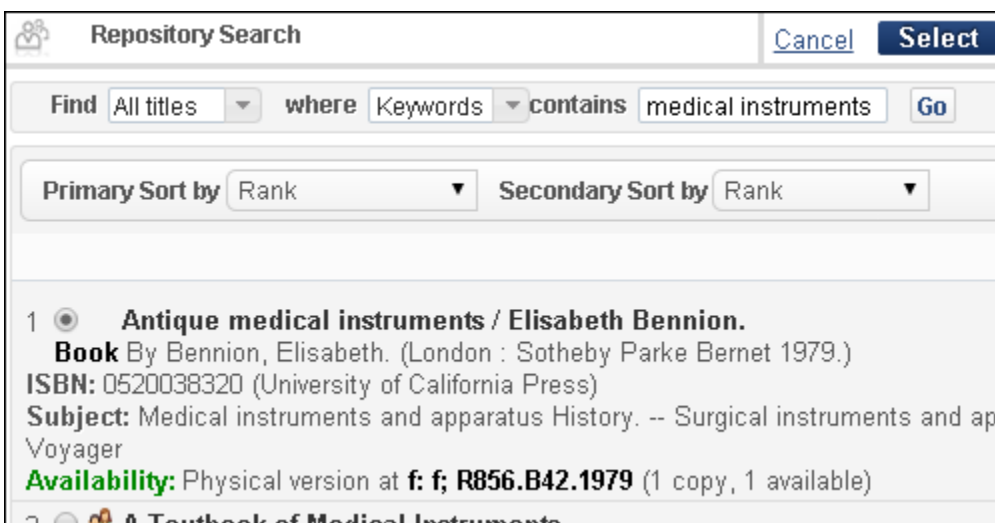


Figure 31 - Identify Bibliographic Record for Relinking

4 Select the bibliographic record to which you want to relink and click **Select**.
The Relink Confirmation dialog box opens with the selected title displayed.

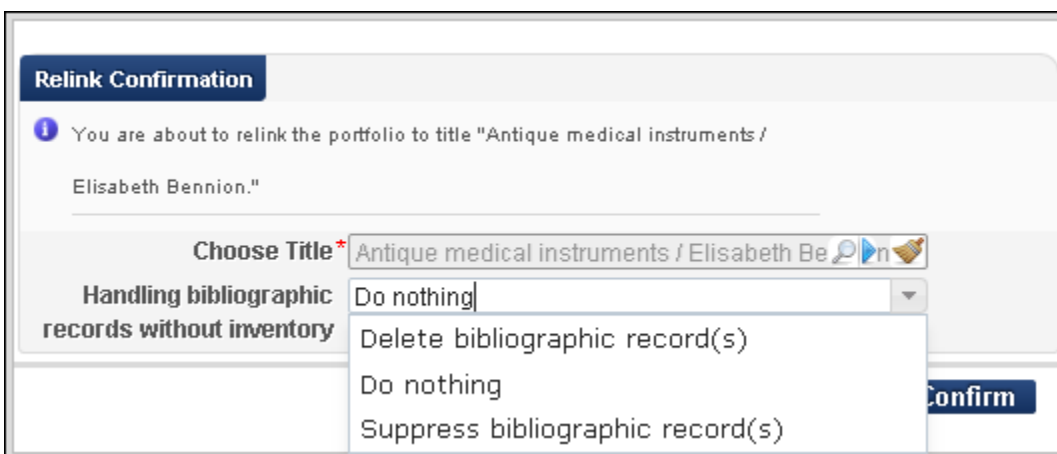


Figure 32 - Selected Title Displays

- 5 Select one of the following options for **Handling bibliographic records without inventory**:
 - **Delete bibliographic record(s)**
 - **Do nothing**
 - **Suppress bibliographic record(s)**

With these options, you can now indicate how you want to handle the unlinked bibliographic record.

- 6 Click **Confirm**.

The system processes your relinking request and displays the Electronic Portfolio Editor page with the updated **Resource description** and a successfully linked message.

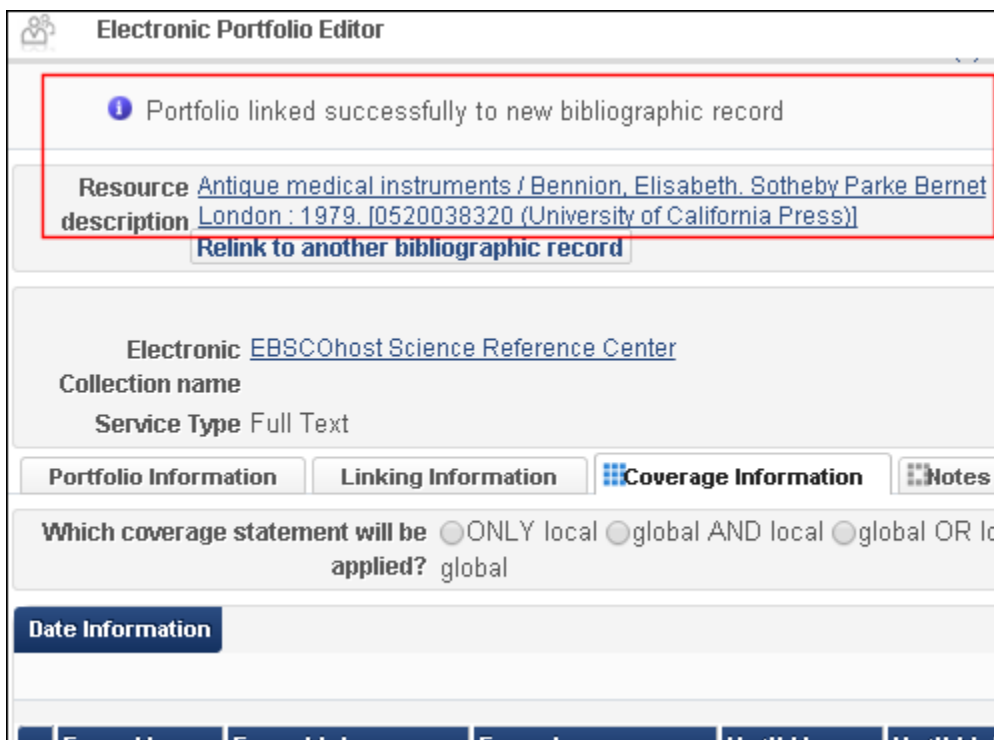


Figure 33 - New Resource Description for Relinked Portfolio

Enhanced Linking of a Standalone Portfolio to an Electronic Collection

Description

In order to provide better and more efficient management of standalone portfolios, it is now possible to link a single, standalone portfolio to an existing electronic collection via the Alma Electronic Resource Editor. Previously, it was only possible to add standalone portfolios to an

existing collection via a batch file (refer to *Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)* in the online help or the *Alma Resource Management Guide*).

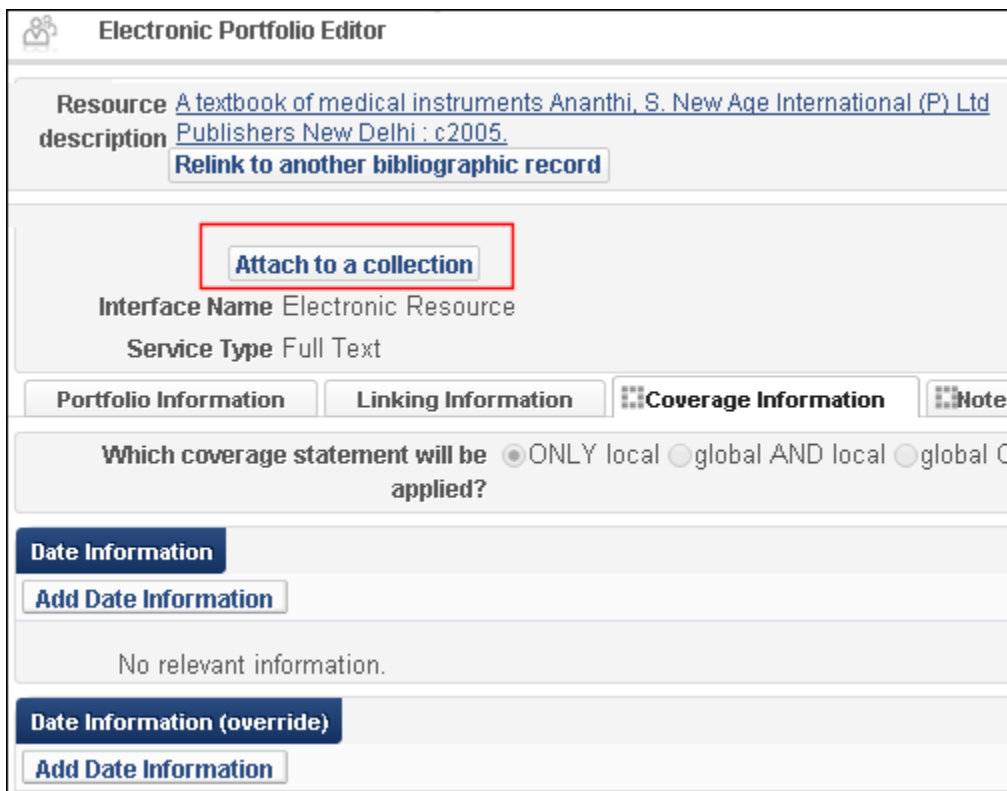
Technical Instructions

The following role can link a standalone portfolio:

- Electronic Inventory Operator

To link a standalone portfolio to an electronic collection (from the Electronic Portfolio Editor):

- 1 Using Repository Search, locate the standalone portfolio that you want to link to an electronic collection and open it in the Electronic Portfolio Editor.
(Hint: Use the **Is Standalone** electronic portfolio search option in Advanced Search.)
- 2 Click **Attach to a Collection**.



The screenshot shows the 'Electronic Portfolio Editor' interface. At the top, there is a header with a gear icon and the title 'Electronic Portfolio Editor'. Below the header, the 'Resource description' is displayed as 'A textbook of medical instruments Ananthi, S. New Age International (P) Ltd Publishers New Delhi : c2005.' A button labeled 'Relink to another bibliographic record' is located below the description. In the center of the interface, a button labeled 'Attach to a collection' is highlighted with a red rectangular box. Below this button, the 'Interface Name' is 'Electronic Resource' and the 'Service Type' is 'Full Text'. There are four tabs: 'Portfolio Information', 'Linking Information', 'Coverage Information', and 'Notes'. Below the tabs, a question asks 'Which coverage statement will be applied?' with radio button options: 'ONLY local' (selected), 'global AND local', and 'global'. Below this, there are two sections for 'Date Information', each with an 'Add Date Information' button. The first section shows 'No relevant information.' and the second section is labeled 'Date Information (override)'.

Figure 34 - Attached to a Collection Button

The Select a Collection and Service dialog box opens.

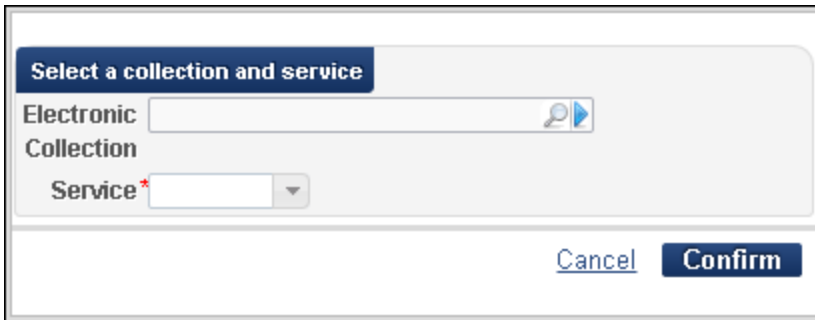


Figure 35 - Select Electronic Collection and Service for the Standalone Portfolio

- 3 Browse to select the electronic collection to which you want to add the portfolio. The **Find** drop-down list is limited to the **Electronic Collection** option.

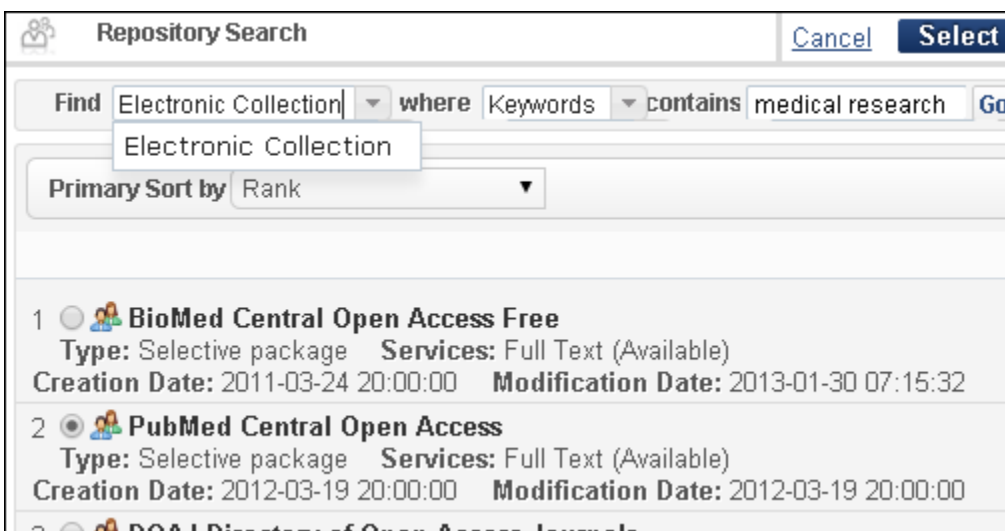


Figure 36 - Browse for Electronic Collection

- 4 Identify the electronic collection to which you want to add the portfolio and click **Select**.
- 5 In the Select a Collection and Service dialog box, select the type of service and click **Confirm**.

The system processes your change and displays *The portfolio successfully attached to ...* message to confirm its successful completion. The Electronic Portfolio Editor page updates to display the electronic collection to which the portfolio has been added and the service type that was selected.

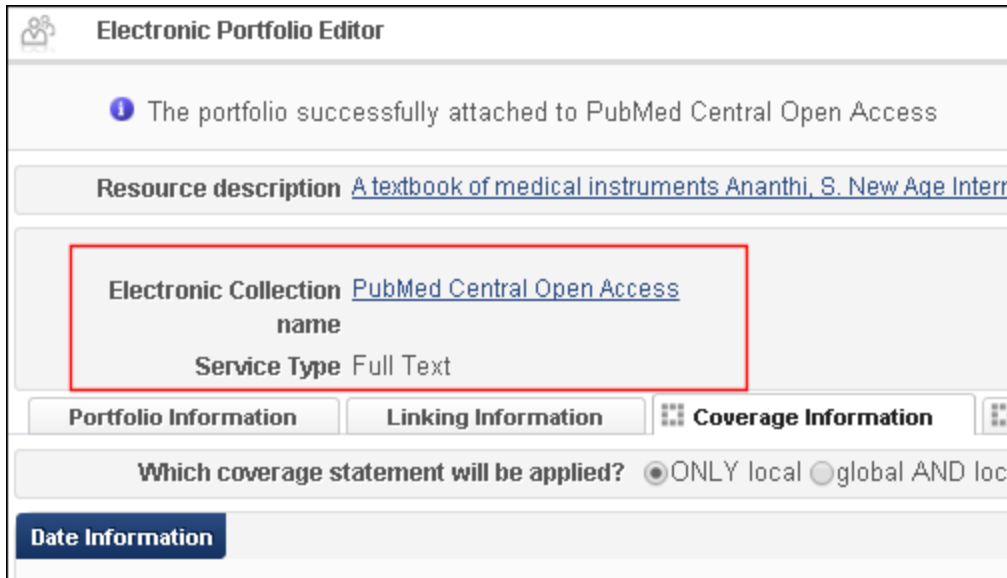


Figure 37 - Electronic Collection and Service Type Selected

Title-Level Overlap Analysis

Description

In order to help with acquisition decisions, you can now use the Overlap Analysis tool to upload a list of titles (using an Excel file) that you are considering acquiring in order to determine whether the titles are part of the library collection.

The Overlap Analysis tool provides the following reports per title load:

- Unique Titles – This report contains titles from the Excel file that the Overlap Analysis tool found to exist only once in the repository.
- Title Overlap – This report contains titles from the Excel file that the Overlap Analysis tool found to exist more than once in the repository.
- Titles Not in the Database – This report contains titles from the Excel file that the Overlap Analysis tool found did not have any matches in the repository.

Technical Instructions

The following roles can complete overlap analysis for selected titles:

- Purchasing Operator
- Purchasing Manager

- Repository Manager
- Electronic Inventory Operator

To complete an overlap analysis for selected titles:

- 1 Click **Submit New Report** on the Overlap Analysis page (**Resource Management > Advanced Tools > Overlap Analysis**).

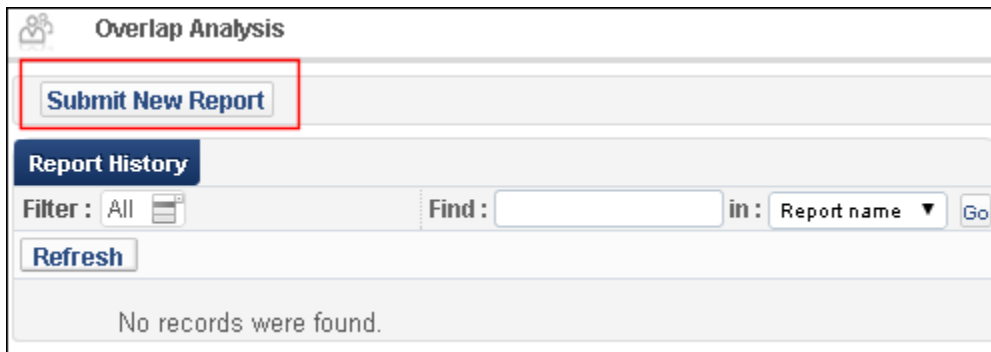


Figure 38 - Submit New Report

The Overlap Analysis wizard opens.

- 2 From the **Choose Report Type** section of step 1, click **Selected Titles** and click **Next**.
- 3 From the **Select File** section in step 2, browse to locate the Excel file containing the unique identifiers for the selected titles you want to compare and click **Next**.

The column heading in the Excel file should identify the contents in the column as one of the following to use for matching records that you want to compare: ISBN, ISSN, LCCN, or TITLE. This Excel file is a single-column file (refer to the example below).

	A
1	ISSN
2	0019-8366
3	0019-8367
4	0019-9368

Figure 39 - Example Single-Column Excel File

- 4 Complete the following information on the Compare Electronic Collections page:
 - **Report name** – Specify a unique name or use the default that is supplied
 - **Report description** – Use this option to further identify the report that his generated by Alma

Figure 40 - Compare Electronic Collections Page

5 Click **Submit**.

The system displays a message confirming that your Overlap Analysis job has been successfully submitted and displays your report job in the Report History section of the Overlap Analysis page.

Report Name	Report Type	Status	Creator	Time Started	Time Ended
1 Overlap Analysis- Fri Dec 12 20:59:38 UTC 2014	Selected Titles	Pending	admin	-	-

Figure 41 - Overlap Analysis Job Details and Submitted Message

- 6 Use **Monitor Jobs (Administration > Manage Jobs)** to track the progress of your Overlap Analysis report.
- 7 When your job has completed processing, select the **History** tab on the Monitor Jobs page and select **Actions > Report** to view your results. Use the **Repository** filter to more quickly locate your report. The report provides the following information:
 - Process ID
 - Name (of the job)

- Started on/Finished on dates and time
- Total run time
- Created by (user ID)
- Status
- Status date
- Records processed (total number)
- Records with exceptions (number)
- Links to the reports created

The screenshot shows a 'Job Report' window with a 'Back' link in the top right. A green banner with a checkmark icon and the text 'Completed Successfully' is displayed. Below this, the job details are as follows:

Process ID 19239557790001041	Name Overlap Analysis job - Overlap Analysis- Tue Dec 16 22:39:04 UTC 2014
Started on 12/16/2014 17:41:09 EST	Finished on 12/16/2014 17:41:12 EST
Total run time 2 Seconds	Created by exl_support
Status Completed Successfully	Status date 12/16/2014 17:41:12 EST
Records processed 3	Records with exceptions 0

Below the statistics, there is a 'Counters' section with two links:

- Link to report: [Selected Titles - Title Overlap report \(1\)](#)
- Link to report: [Selected Titles - Not In Db report \(2\)](#)

Figure 42 - Overlap Comparison Report Links

- 8 Click the links in the results provided to view the following types of comparisons/reports (in Excel format):
 - Selected Titles – Title Overlap Report – This report contains titles from the Excel file that the Overlap Analysis tool found to exist more than once in the repository.
 - Selected Titles – Unique Titles Report – This report contains titles from the Excel file that the Overlap Analysis tool found to exist only once in the repository.
 - Selected Titles – Not in DB Report – This report contains titles from the Excel file that the Overlap Analysis tool found did not have any matches in the repository.

Each report link has a number in parentheses indicating the number of titles in the report. For example, **Selected Titles - Title Overlap report (1)** indicates that there is one title in the Title Overlap Report as a result of the comparison that was done.

The Title Overlap Report and the Unique Titles Report contain the following columns:

- Title
- Identifier
- MMS ID
- Collection
- Interface
- Portfolio ID
- Coverage

The Not in DB Report contains the following column:

- Identifier

Below is an example of a Selected Titles – Overlap Report that contains matching titles with overlapping coverage dates. This illustration is displayed in four sections showing row 1 for columns A-C, D-E, F, and G of the report spreadsheet. Specifically, column G shows the coverage overlap information.

	A	B	C
1	TITLE	Identifier	MMS ID
2	"Industrial health."	00198366	99716758610001041

Figure 43 - Row 1, Columns A-C

	D	E
1	Collection	Interface
2	"J-STAGE Free" "DOAJ Directory"	"J-STAGE" "DOAJ Directory"

Figure 44 - Row 1, Columns D-E

	F
1	Portfolio ID
2	532514227580001041 532514227570001041 532561799330001041

Figure 45 - Row 1, Column F

	G
1	Coverage
2	1963- 2000- 2013- 2013-

Figure 46 - Row 1, Column G

Importing a Single Bibliographic Record

Description

In order to be able to synchronize bibliographic records with external catalogs, it is now possible to import single bibliographic records in a streamlined manner (upload the import file, perform the import, and search for/edit the record).

Technical Instructions

The following roles can configure import profiles and the ability to import a single bibliographic record:

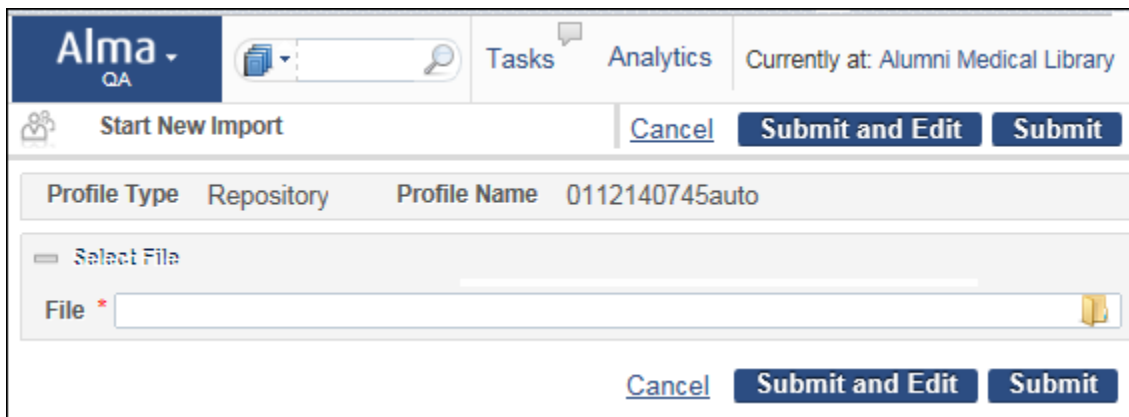
- Catalog Administrator
- General System Administrator

The following roles can import a single bibliographic record:

- Catalog Manager
- Catalog Administrator

To import a single bibliographic record:

- 1 Configure a Repository import profile.
- 2 In the Other Settings Configuration table (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**) click **Customize** for the **upload_single_record_from_file** parameter key.
- 3 In the **Parameter** field, enter the name of the import profile that you want to use when importing a single bibliographic file.
- 4 Select **Resource Management > Import > Upload single record from file**. The following is displayed:



The screenshot shows the 'Start New Import' dialog in the Alma QA interface. The top bar includes the Alma QA logo, a search bar, and navigation links for 'Tasks' and 'Analytics'. The current location is 'Alumni Medical Library'. The main area has a 'Start New Import' button and three action buttons: 'Cancel', 'Submit and Edit', and 'Submit'. Below this is a table with columns for 'Profile Type', 'Repository', and 'Profile Name', with the value '0112140745auto' in the 'Profile Name' column. A 'Select File' section follows, containing a 'File *' input field and a folder icon. At the bottom, there are 'Cancel', 'Submit and Edit', and 'Submit' buttons.

Figure 47 – Start New Import

- 5 Select the file with the bibliographic record that you want to import.
- 6 Click **Submit and Edit** to open the imported record in the MD Editor. For example:

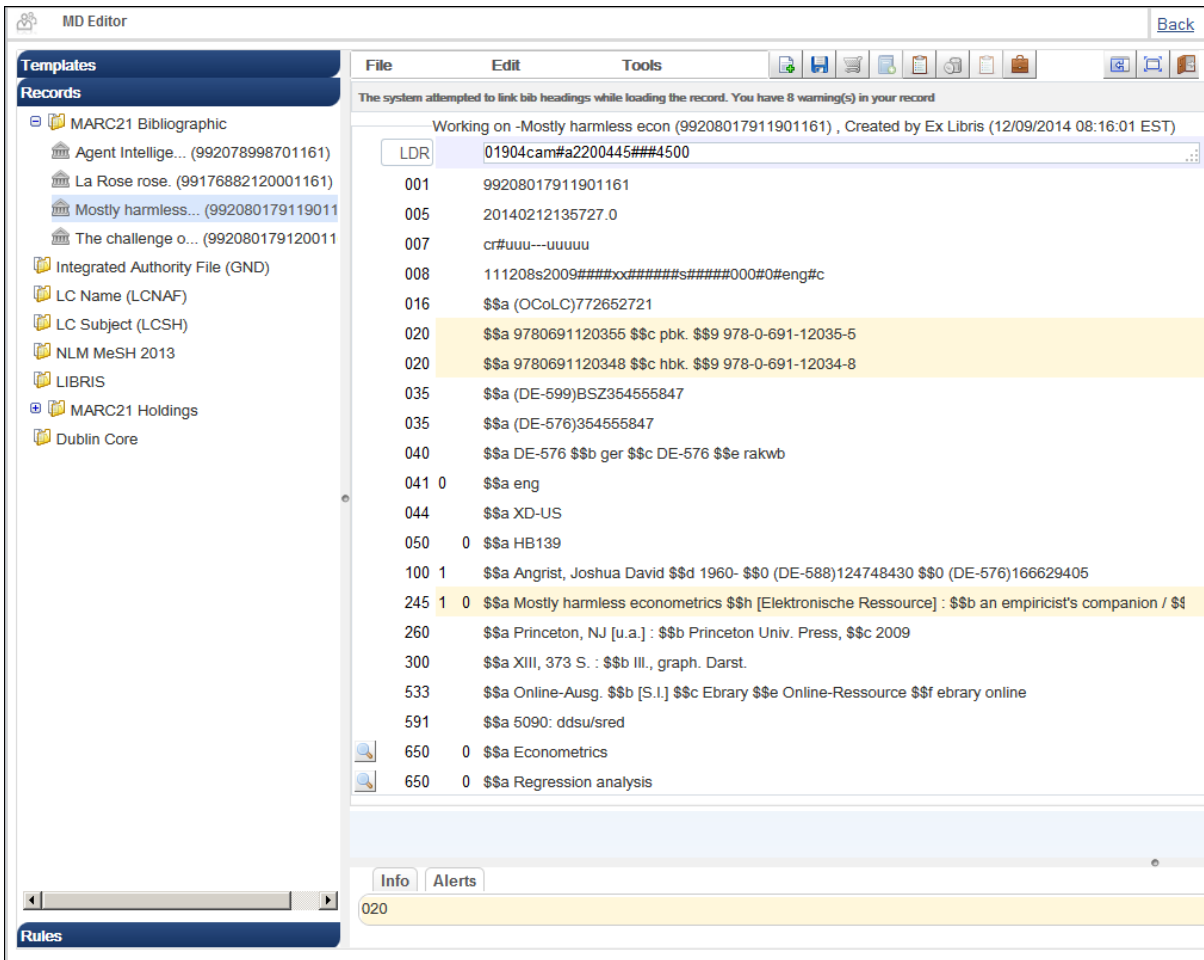


Figure 48 – Submit and Edit

7 Click **Edit** to display the record in the repository. For example:

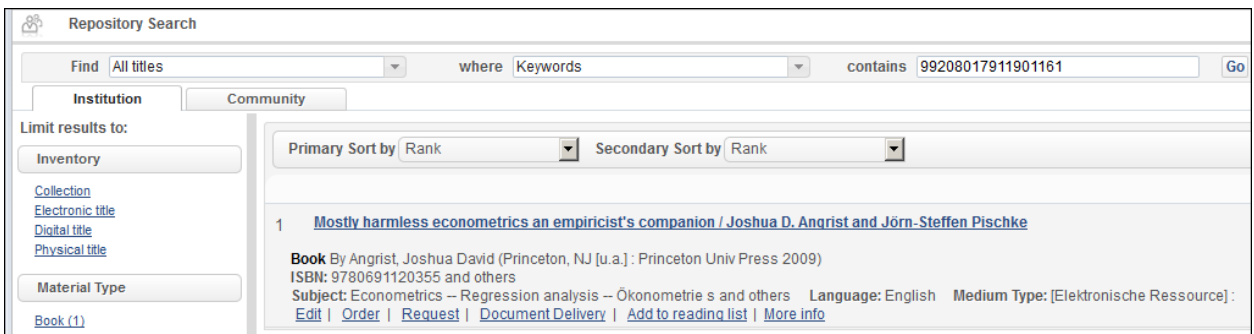


Figure 49 –Submit

Delete Action Added to Digital IE, Representations, and Files

Description

This enhancement allows you to delete digital inventory at the IE (all representations), representation (all files), and file (single file) levels using the following digital inventory editors: Digital IE Resource Editor or Digital Representation Resource Editor.

Technical Instructions

The following roles are needed to update and delete digital inventory.

- Digital Inventory Operator
- Digital Inventory Operator Extended

To delete a title's digital inventory (including all representations and files):

- 1 Perform a repository search for the digital title that you want to delete.
- 2 Click the **Edit** link in the title's results to open the record's details on the Digital IE Resource Editor page.
- 3 In the **Reports and Services** tab, click **Delete IE** under the Services section.



Figure 50 – Digital IE Resource Editor – Delete All Digital Representations

During the deletion process, you may receive the following confirmation messages:

- **Digital inventory has representations. Delete anyway?** – Click **Confirm** if you want to continue deleting the digital title.
- **Handling bibliographic records without inventory** – This indicates that the title has no physical, electronic, and digital inventory. Specify one of the following options to handle the bibliographic record for the title:
 - **Delete** – deletes the bibliographic record
 - **Do nothing** – retains bibliographic record
 - **Suppress** – retains bibliographic record and suppresses the record from discovery

To delete a digital representation (including all files):

- 1 Perform a repository search for the digital title that you want to update.
- 2 Click the **Edit** link in the title’s results to open the record’s details on the Digital IE Resource Editor page.
- 3 In the **Representations** tab, select **Actions > Delete** for the representation that you want to delete.

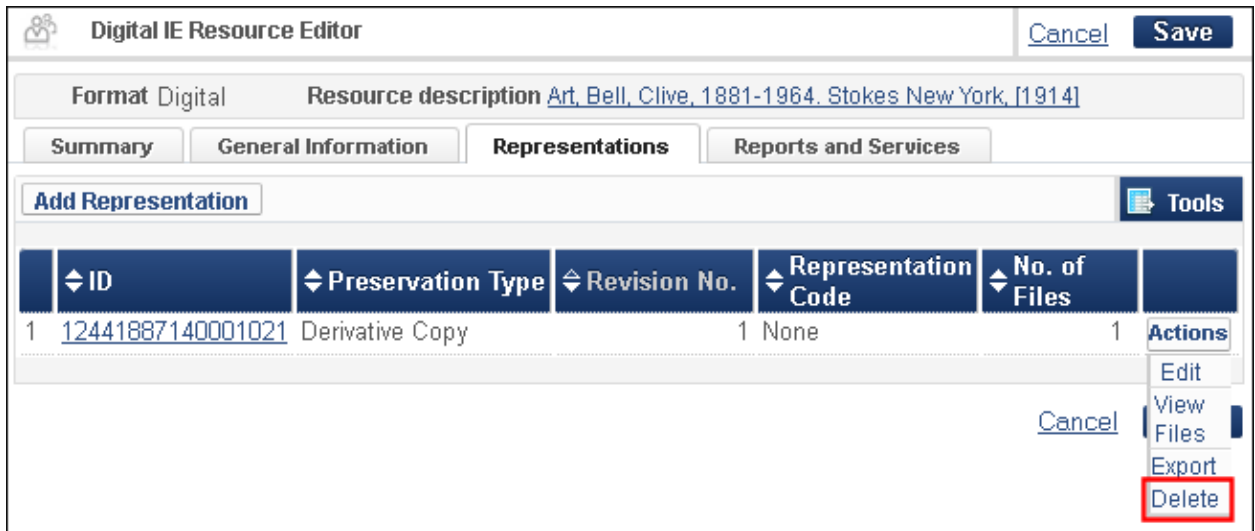


Figure 51 – Digital IE Resource Editor – Delete a Digital Representation

During the deletion process, you may receive the following confirmation messages:

- **Representation contains files. Delete anyway?** – Click **Confirm** if you want to continue deleting the digital representation.
- **Handling bibliographic records without inventory** – This indicates that the title has no physical, electronic, and digital inventory. Specify one of the following handling options: **Delete**, **Do nothing**, or **Suppress**.

To delete a digital file:

- 1 Perform a repository search for the digital title that you want to update.
- 2 Click the **Edit** link in the title’s results to open the record’s details on the Digital IE Resource Editor page.
- 3 In the **Representations** tab, select **Actions > View Files** for the representation that you want to update.

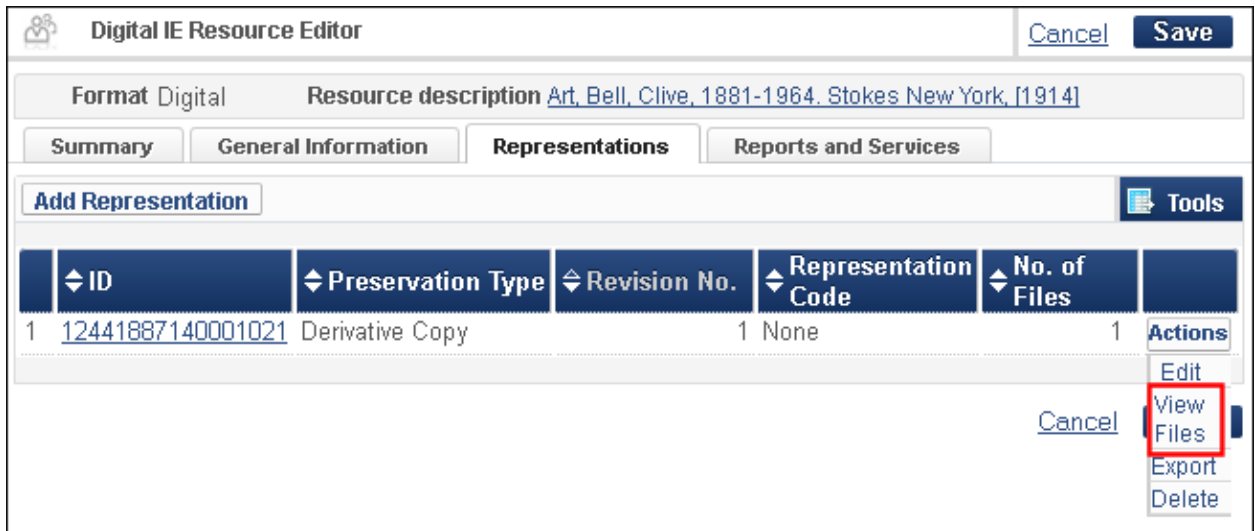


Figure 52 – Digital IE Resource Editor – View Digital Files

- On the Digital Representation Resource Editor page, select **Actions > Delete** for the file that you want to delete.

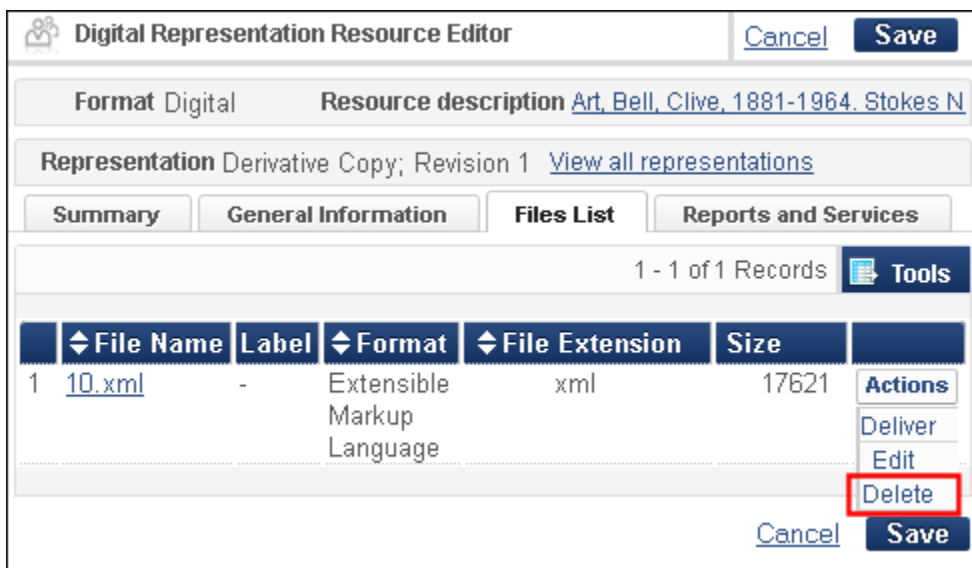


Figure 53 – Digital Representation Resource Editor – Delete Digital File

During the deletion process, you may receive the following confirmation messages:

- **Delete file?** – Click **Confirm** if you want to continue deleting the file.
- **Last file of representation was deleted. Do you want to delete the representation?** – Click **Confirm** if you want to also delete the representation.
- **Handling bibliographic records without inventory** – This indicates that the title has no physical, electronic, and digital inventory. Specify one of the following handling options: **Delete**, **Do nothing**, or **Suppress**.

Other Resource Management Enhancements

- Call number parsing routine number 12 was added. This routine works like routine number 6, but does not split the classification part by letters and digits. For example:

```
Call number = $$h KJV444.21804 A7 $$i L63 1805  
KJV444  
.21804  
A7  
L63  
1805
```

- The **Inventory** tab on the Vendor Interface Details page now returns only exact matches.
- In the MD Editor, a **Clear** button was added to the Search External Resources page. Clicking this button initializes the page.
- The MARC 21 BIB Normalization job can now add local extensions to a record with no local extensions.
- The following enhancements were made in the punctuation rules for authorities preferred term correction:
 - 7XX ending with \$d is not handled if it ends with a hyphen or question mark.
 - 7XX ending with \$t – a period is added, if it does not end with a period or question mark
- Integration with the Omeka and Bepress/DigitalCommons remote digital management systems is now supported.

Fulfillment

The following section describes the new functionality provided for the Fulfillment functional area in the January 2015 release of Alma.

Enhancement to the Inventory Add Message Sent to the Dematic ASRS

Alma sends an Add Item message to the Dematic ASRS (Automate Storage and Retrieval Systems) when an item is added or moved to a Dematic ASRS location or when its barcode is changed. Currently, Alma sends barcode information in the Inventory Add (IA) message to the Dematic ASRS. In the January release of Alma, the content of the IA message sent to the Dematic ASRS has been enhanced to send the following: Barcode

- Title
- Location
- Call number
- Author

Other Fulfillment Enhancements

- It is now possible to request items that are marked as missing. To be able to do so, you must set the value of the **missing_item_requestable** customer parameter (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) to **True** (the default is False).
- A user information pop-up is now available in the **Requester** column of the Returns page. In addition, the paging has been removed and all items are now presented on the same page.
- The label Manage Item in Process on the Scan In Items page (for departments) has been changed to **Manage In Process Items**.
- On the Pick Up Requested Resources page, the default value in the actions list at the top of the page has been changed from Cancel to **Print Slip** to avoid the accidental cancellation of requests.

- The parameter **Package** in the display logic rule configuration (which is relevant only for Full Text/ Selected Full Text/ DB Service service types) has been changed to **Electronic collection**.
- A **Translate All** button was added to the Discovery Interface Labels code table (Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Labels) to enable the translation of labels.

Resource Sharing

The following sections describe the functions provided for Resource Sharing in the January 2015 release of Alma.

New ILL Search Fields

Description

New search fields have been enabled when searching for a borrowing request. These fields can assist in fine-tuning the search for the item on the lender side. The fields are displayed in the resulting lending requests, on reading lists, and in Primo.

Technical Instructions

The following roles can utilize the new fields when searching for a borrowing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

To utilize the new fields during a resource sharing borrowing request search:

- 1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Add > From Search** or **Add > From External Resource**.
- 2 Perform a search for an item, and select one of the displayed items. The Resource Sharing Borrowing Request page appears.
- 3 Enter values in the relevant fields, and click **Save and Edit**. The **LCCN** and **OCLC number** fields appear on the Resource Sharing Borrowing Request page.
 - **LCCN**: The Library of Congress Control Number of the item
 - **OCLC number**: The Online Computer Library Center number of the item

Resource Sharing Borrowing Request					
General Information	Audit	Rota	Parameters	General Messages	Notes
Resource Information					
Article/Chapter Title					
Journal Title *	History matters				
Author					
Volume					
Author Initials					
Issue					
ISSN	1934-4651				
LCCN	2006215032				
OCLC Number	(CKB)100000000315880				
DOI					
PMID					
Publisher	Dept of History at Appalachian Sta				
Place of Publication	Boone, NC :				
Additional Person Name					
Source					
Series Title Number					
Note					
Chapter					
Pages					

Figure 54 – Resource Sharing Borrowing Request Page — LCCN and OCLC Number Fields

- 4 Click **Save**. The item’s LCCN and OCLC number values display on the Resource Sharing Borrowing Requests page.

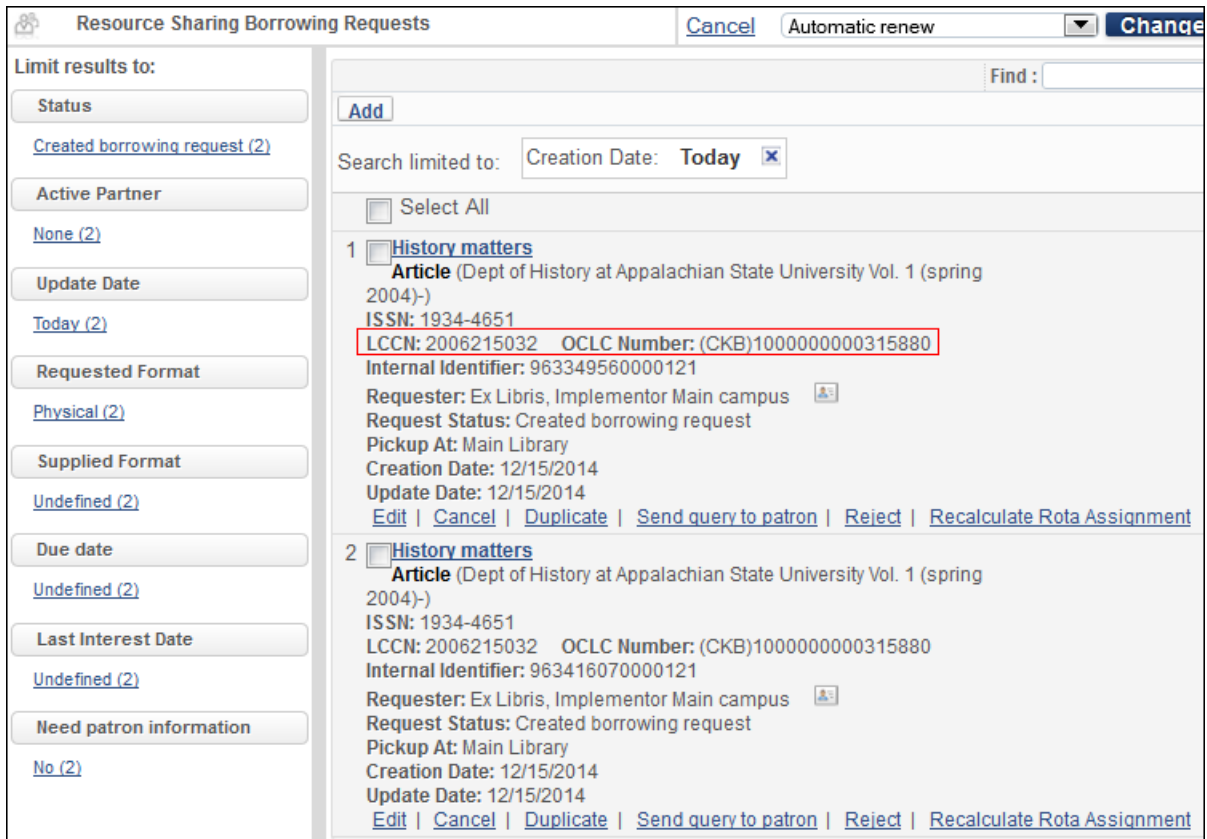


Figure 55 – Resource Sharing Borrowing Requests Page — LCCN and OCLC Number Fields

The LCCN and OCLC **number** values can be set in the following fields in the MD Editor:

- LCCN: 010
- OCLC number: 035

Patron Information Included in Resource Sharing Requests

Description

This feature enables including patron information when sending a resource sharing request via an ISO partner. This facilitates the management of resource sharing requests on both the lender and borrower sides, when the lender communicates issues with the borrower, or when the borrower physically receives the item.

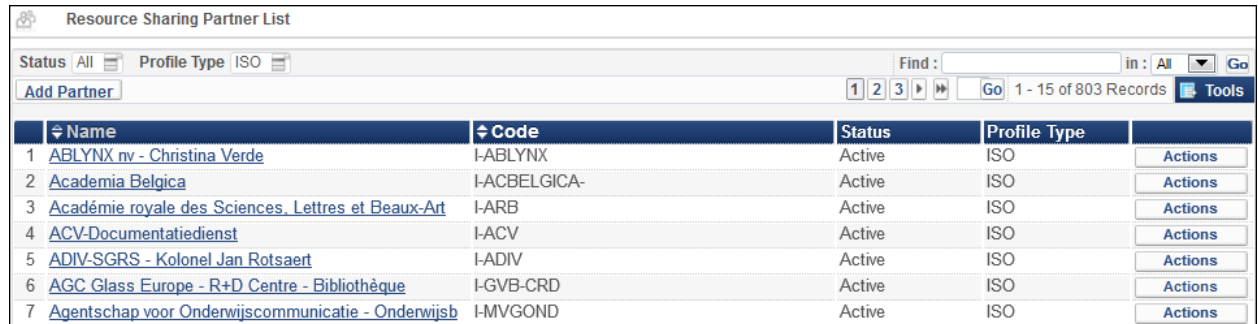
Technical Instructions

The following role can include patron information in ISO resource sharing requests:

- Resource Sharing Partners Manager

To designate an ISO partner to include patron information in resource sharing requests:

- 1 On the Resource Sharing Partner List page (**Fulfillment > Resource Sharing > Partners**), select **ISO** in the **Profile Type** filter to display ISO partners.

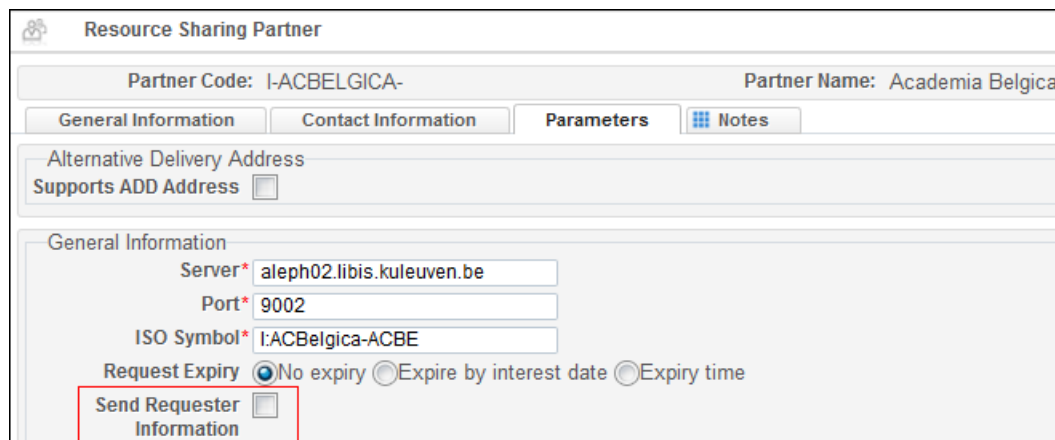


The screenshot shows the 'Resource Sharing Partner List' page. At the top, there are filters for 'Status' (set to 'All') and 'Profile Type' (set to 'ISO'). A search bar is present with the text 'Find :'. Below the filters, there is a table with columns: Name, Code, Status, Profile Type, and Actions. The table lists seven partners, all with 'Active' status and 'ISO' profile type. The 'Send Requester Information' checkbox is highlighted in red in the original image.

	Name	Code	Status	Profile Type	Actions
1	ABLYNX nv - Christina Verde	I-ABLYNX	Active	ISO	Actions
2	Academia Belgica	I-ACBELGICA-	Active	ISO	Actions
3	Académie royale des Sciences, Lettres et Beaux-Art	I-ARB	Active	ISO	Actions
4	ACV-Documentatiedienst	I-ACV	Active	ISO	Actions
5	ADIV-SGRS - Kolonel Jan Rotsaert	I-ADIV	Active	ISO	Actions
6	AGC Glass Europe - R+D Centre - Bibliothèque	I-GVB-CRD	Active	ISO	Actions
7	Agentschap voor Onderwijscommunicatie - Onderwijsb	I-MVGOND	Active	ISO	Actions

Figure 56 –Resource Sharing Partner List Page — ISO Partners

- 2 Select **Actions > Edit** for a partner, and click the **Parameters** tab. The Resource Sharing Partner page opens.



The screenshot shows the 'Resource Sharing Partner' page for 'Academia Belgica' (Partner Code: I-ACBELGICA-). The 'Parameters' tab is selected. The 'General Information' section is expanded, showing fields for 'Server*' (aleph02.libis.kuleuven.be), 'Port*' (9002), and 'ISO Symbol*' (I:ACBelgica-ACBE). The 'Request Expiry' section has radio buttons for 'No expiry' (selected), 'Expire by interest date', and 'Expiry time'. The 'Send Requester Information' checkbox is highlighted in red.

Figure 57 –Resource Sharing Partner Page

- 3 Select the **Send requester information** check box. Resource sharing requests sent via the specified partner will contain the requester's information, as described in the following procedure.

To create a resource sharing request containing patron information:

- 1 Create a resource sharing borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**).

Resource Sharing Borrowing Request Cancel Save and Edit

General Information Parameters

Request Attribute

Title C# Database Basics

Requester*

Owner* Resource Sharing Library

Partner Academia Belgica

Request Status Created borrowing request

External Identifier

Requested Format Physical

Allow Other Format

Preferred Send Method

Needed By

Delivery Location Deliver to library Alternative address

Pickup At* Main Library

Shipping Cost USD

Willing to Pay

Agree to Copyright terms

Needs patron information

Request Note

Maximum Fee

Add Partners Add Rotas

Figure 58 –Resource Sharing Borrowing Request Page

- 2 In the **Requester** field, enter a requesting patron.
- 3 In the **Pickup at** field, select a library where the item is to be picked up.
- 4 Click the **Add Partners** button. The Resource Sharing Partner List page opens.
- 5 Select the partner for whom you selected the **Send requester information** check box in the previous procedure, and click **Select**.
- 6 On the Resource Sharing Borrowing Request page, click **Send** to send the request.
- 7 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), locate the request and click **Edit**. The Resource Sharing Lending Request page opens.
- 8 In the **Request Attribute** section at the bottom of the page, locate the **Request note** field. The field contains the following patron information, separated by double pipes:
 - Patron name
 - Patron identifier

- Pickup location

The screenshot shows a web form for creating a request. At the top, there are fields for 'Chapter' and 'Pages'. Below that is a 'Request Attribute' section with the following fields:

- Supplied To***: Academia Belgica (dropdown)
- Owner***: Resource Sharing Library (dropdown)
- Request Status**: Shipped Physically (dropdown)
- External Identifier***: aaa (text input)
- Format**: Physical (dropdown)
- Allow Other Format**:
- Shipping Cost**: 10.00 USD (text input)
- Date Needed By**: (calendar icon)
- Due Date**: 10/08/2014 (text input)
- Request Note**: ||Implementer, Ex Libris|lexl_imp||Main Library (text input, highlighted with a red box)
- Requester Email**: (text input)

Figure 59 – Request Note Field with Patron Information

The contents of the **Request note** field are sent with the ISO request.

Enabling Multiple Resource Sharing Libraries for a Patron

Description

This feature enables defining more than one resource sharing library for a patron. Alma is configured out-of-the-box with a single resource sharing library (called **Resource Sharing Library**). You can now enable users to have up to five different resource sharing libraries to be responsible for resource sharing requests initiated by the patron.

When defined, multiple resource sharing libraries can be specified both for specific patrons and in Primo.

Technical Instructions

The following roles can configure a library as a resource sharing library in an institution:

- General System Administrator
- Fulfillment Administrator

The following roles can enable multiple resource sharing libraries for a patron:

- User Manager

- User Administrator

The following role can specify multiple resource sharing libraries in Primo:

- General System Administrator

To configure a library as a resource sharing library in an institution:

- 1 On the Summary tab of the Organization Unit Details page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Opening Hours**, select the **Summary** tab), locate the **Resource Sharing Information** section.

The screenshot shows the 'Organization Unit Details' page for 'Alma University'. The 'Summary' tab is selected. Under the 'Resource Sharing Information' section, the 'Is Resource Sharing Library' checkbox is checked and highlighted with a red box. Other fields include 'Itemless' (unchecked), 'ISO Symbol' (empty), 'Borrowing Setup' (Cancel request on locate failure: unchecked, Automatically activate locate profile: unchecked), 'Default Location' (empty), 'Default Pickup Location' (empty), and 'Lending Setup' (Automatically Locate Resource: unchecked, Default Location: empty).


Figure 60 – Organization Unit Details Page — Is Resource Sharing Library Check Box

- 2 Select the **Is resource sharing** check box, and configure any other relevant fields.
- 3 Click **Save**. The library is configured as a resource sharing library.

To enable multiple resource sharing libraries for a patron:

- 1 On the Find and Manage Users Page (**Administration > User Management > Find and Manage Users**), select **Actions > Edit** for a patron. The User Details page opens.

User Details [Cancel](#) [Toggle Account Type](#)




 **Name** Oscar Aaberg **Primary identifier** 252571 **Record type** Public
 Undergraduate Student **Account Type** External **User g**
[Manage fulfillment activities](#)

General Information | **Contact Information** | **Identifiers** | **Notes** | **Blocks** | **Fines/Fees** | **Demerits**

Attachments | **Proxy For**

— User Information

First name* Oscar Middle name
 Last name* Aaberg Primary identifier* 252571
 PIN number [Generate](#)
 Job category Patron Job description
 Gender User group Undergraduate Student
 Campus Website URL
 Preferred language English Status Active
 Status date 07/17/2011 Birth date -
 Expiration date - Purge date -
 Resource sharing library

 Created By circ (10/18/2006)  Updated By exl_impl#####EXLDEMO1_INST (08/21/2014) 

— User Management Information

Disable all login restrictions

— User Roles

Figure 61 – User Details Page — Resource Sharing Library Field

- 2 In the **Resource sharing library** field, select a resource sharing library. If more than one library has been configured, selecting a value causes another **Resource sharing library** field to appear on the page.

User Details

External **Name** Oscar Aaberg **Primary identifier** 252571
[Manage fulfillment activities](#) **User group** Undergraduate Student

General Information | **Contact Information** | **Identifiers** | **Notes** | **Blocks** | **Fines/Fees**

— User Information

First name * Oscar Middle name
 Last name * Aaberg Primary identifier
 PIN number **Generate**
 Job category Patron Job description
 Gender User group
 Campus Website
 Preferred language English Status
 Status date 07/17/2011 Birth date
 Expiration date - Purge date
 Resource sharing library Resource Sharing Library
 Resource sharing library
 Created By circ (10/18/2006) Update

— User Management Information

Disable all login restrictions

— User Roles

Figure 62 – User Details Page — Multiple Resource Sharing Library Fields

- 3 Optionally, select another library to handle the patron’s resource sharing requests.
- 4 Click **Save**.

When multiple resource sharing libraries are assigned and you create a resource sharing borrowing request for the specified patron (**Fulfillment > Resource Sharing > Borrowing Requests**, select **Add** to add a request), the **Owner** field displays as a drop down list, enabling you to select from the resource sharing libraries assigned to the patron.

Mapping Table			
You are configuring: Main Campus			
Table Information			
Sub System	INFRA		Ta
Updated By	-		Last
Table Description	Customer Parameters		
Mapping Table Rows			
	parameter key	parameter module	parameter value
1	auto_renew_loan_days	fulfillment	2
2	check_self_ownership_serial	fulfillment	true
3	course_restricted_bib_data_will_be_deleted	fulfillment	false
4	demerit_enable	fulfillment	false
5	demerit_history_days	fulfillment	0
6	demerit_maximum_threshold	fulfillment	0
7	demerit_suspension_days	fulfillment	0
8	distribute_fulfill_changes_last_run	fulfillment	
9	email_partner_configurable_line1	fulfillment	
10	email_partner_configurable_line2	fulfillment	
11	enable_request_during_loan_for_different_po	fulfillment	false
12	exclude_lost_and_claimed_returned_loans_fr	fulfillment	false
13	generate_resource_sharing_temp_barcode	fulfillment	true
14	generate_temporary_barcode	fulfillment	true
15	ignore_lender_due_date	fulfillment	false
16	ill_item_creation_lib_code	fulfillment	RES_SHARE
17	ill_item_creation_lib_code	fulfillment	OUT_DS_REQ

Figure 64 – Customer Parameters Mapping Table — ill_item_creation_lib_code Field

- 2 Click **Customize** and modify the parameter value to **ALL**.
- 3 Click **Save**. All configured resource sharing libraries are enabled for all patrons.

If a patron’s specific TOU indicates that resource sharing libraries are not enabled, the patron’s TOU overrides this setting.

To view multiple resource sharing libraries in Primo:

- 1 Log in to Primo and perform a search for an item.
- 2 Click the **Get It** link for one of the results. The Get It tab page opens.

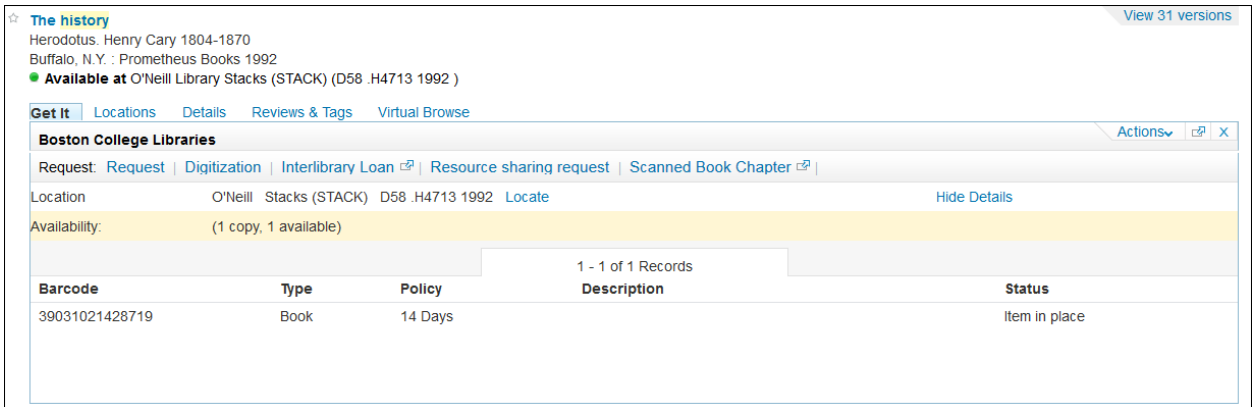


Figure 65 – Primo Get It Tab

3 Click the **Resource sharing request** link. The page refreshes.

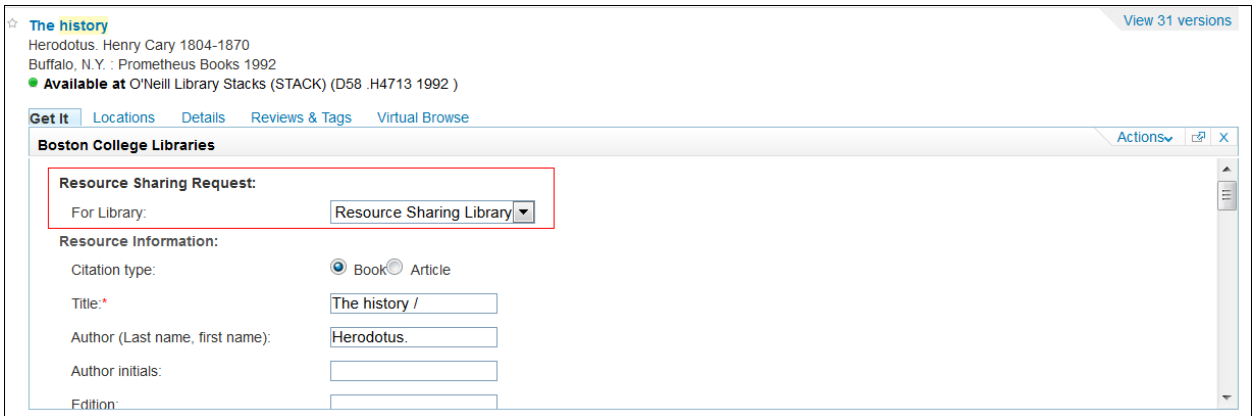


Figure 66 – Primo Get It Tab – Multiple Resource Sharing Libraries

- 4 In the **For Library** field, select the relevant resource sharing library. The libraries display according to the `ill_item_creation_lib_code` value in the CustomerParameters mapping table (see the previous procedure), and/or those for which the patron's TOU are enabled.
- 5 Scroll down in the Get It tab page and locate the **Pickup/delivery location** field in the Delivery Information section. Specify a location for pickup/delivery in the drop-down list.

The screenshot shows the 'Get It' tab in the Primo interface, with sub-tabs for 'Locations', 'Details', 'Reviews & Tags', and 'Virtual Browse'. The 'BC Libraries' section is active, displaying 'Delivery Information'. The 'Format' field has three radio buttons: 'Physical' (selected), 'Digital', and 'Physical non-returnable'. The 'Delivery Location' field has two radio buttons: 'Deliver to library' (selected) and 'Alternative address'. The 'Pickup/delivery location' field is a drop-down menu with 'Law' selected and is highlighted with a red rectangular box. Below it are input fields for 'Not Needed After' (with a calendar icon), 'Comment', and 'Maximum fee:(USD)'.

Figure 67 – Primo Get It Tab – Pickup/delivery location Field

The values in the **Pickup/delivery location** drop-down depend on the value selected in the **For library** field in the previous step.

Other Resource Sharing Enhancements

- Clicking the **Print Slip** link for lending requests now displays both the external ID and barcode.
- The following enhancements have been made to the handling of maximum fees:
 - The maximum fee is now transferred from Primo to Alma.
 - The **Maximum fee** field is now part of the resource sharing Requests API.
 - The **Maximum fee** input field has been added to the Request Attributes of the resource sharing borrowing request.
 - The **Maximum fee** field is now included in the request email and ISO request

Administration

The following enhancements have been made to the Administration functional area in the January 2015 release of Alma:

Link Fees to Physical Items

Description

This feature enables you to manually administer a fine/fee and assign it to a specific item. Previously, items were associated with a particular fine/fee as part of fulfillment workflows.

Technical Instructions

The following roles can link a fee to a physical item:

- User Manager
- User Administrator

To link a fee to a physical item:

- 1 In the **Fines/Fees** tab of the User Details page (**Administration > User Management > Find and Manage Users**, select **Actions > Edit** for a user and click the **Fines/Fees** tab), click **Add Fine or Fee**. The Add Fine or Fee dialog box opens.

The screenshot shows a dialog box titled "Add Fine or Fee". It contains the following fields and controls:

- Operator Name:** Ex Libris Implementer
- Fee Type:** Card renewal (dropdown menu)
- Fee Amount:** 0.00 USD
- Item Barcode:** (text input field with a search icon)
- Comment:** (text area)

At the bottom right, there are three buttons: **Close**, **Add**, and **Add and Close**.

Figure 68 – Add Fine or Fee Dialog Box

- 2 In the **Item barcode** field, browse for the item to which you want to attach the fee.
- 3 In the **Fee amount** field, enter a fee for the item.
- 4 Click **Add and Close**. The fee displays with the relevant title and barcode.

	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance	
1	09/12/2014	Card renewal	Active	09/12/2014	-	Clean Training	The politics of history.	21983	10.00 USD	10.00 USD	Action

Currently filtered balance 10.00 USD
Currently filtered disputed balance 0.00 USD

Figure 69 – Fines and Fees Details — Added Fee

- For fines/fees that are not associated with an item, or to override the current fee/item association, select **Actions > Link to Item**. The Link to Item page opens.

Link to item

You are about to link the following fine to an item

Operator name Implementer, Ex Libris
Fine/Fee type Card renewal
Item Barcode *

Figure 70 – Link to Item Page

- In the **Item barcode** field, browse for the item to which you want to attach the fee.
- Click the **Link to Item** button (not shown in the image above). The **Title** and **Item Barcode** column values on the Fines and Fees Details page update accordingly.

	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance	
1	09/12/2014	Card renewal	Active	09/12/2014	-	Clean Training	Principles of data-base management / James Martin.	68733	10.00 USD	10.00 USD	Action

Currently filtered balance 10.00 USD
Currently filtered disputed balance 0.00 USD

Figure 71 – Fines and Fees Details — Updated Item

Other Administration Enhancements

- The following User Management label changes were made:
 - On the Add New Roles page (**Administration > User Management > Find and Manage Users**, edit or add a user, and click **Add Role**), the **Description** column was changed to **Privileges**.

- On the User Details page (**Administration > User Management > Find and Manage Users**, edit a user), under **User Roles**, the **Role Group** column was changed to **Role Area**.
- Role Templates in User Management Configuration (**Administration > User Management Configuration > Configuration Menu**) was changed to **Profiles**.
- Statistical Types (in User Management and User Management Configuration) was changed to **Category Types**. The previous Category Types was changed to **Statistical Categories/Types**.
- The Roles Report and Privileges Report (**Administration > User Management**) are no longer available to customers. They are now available to Ex Libris staff only.
- The **Payment Method** was added to the Fines and Fees report.
- When adding a library-level fine/fee from the Find and Manage Users page when **Currently at: = None**, a warning message now displays stating that you must be at a library/circulation desk to add the fine/fee.
- Support for Windows NT was added to Alma FTP.

Analytics

The following sections describe the functions provided for Analytics in the January 2015 release of Alma.

Exchange Rate Detail Fields Added to Funds Expenditure Subject Area

Description

The following fields have been added to the **Fund Transaction Details** dimension of the **Funds Expenditure** subject area:

- Exchange Rate
- Exchange Rate Date
- Explicit Ratio
- Source Amount
- Source Currency

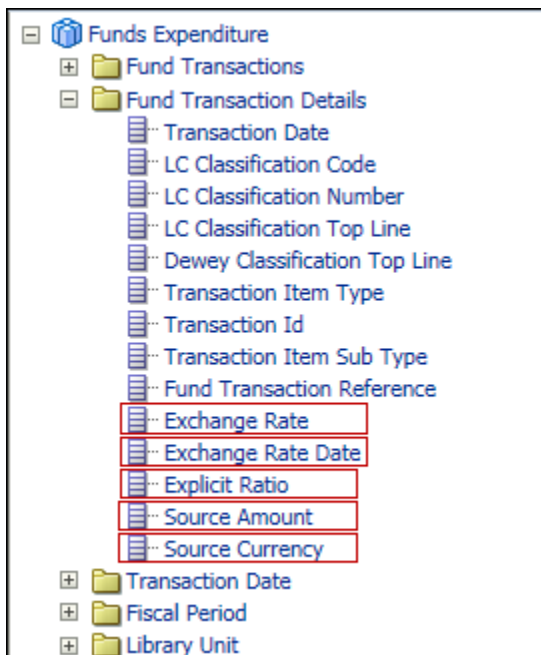


Figure 72 – Exchange Rate Detail Fields

Technical Instructions

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

Exchange Rate	Exchange Rate Date	Explicit Ratio	Source Amount	Source Currency
1	9/3/2013	No	0	USD
1			1	USD
1			5	USD
1			6	USD
1			10	USD
1			10	USD
1			10	USD
1			16	USD
1			19	USD
1			19	USD

Figure 73 – Exchange Rate Detail Fields Report

These new exchange rate detail fields are taken from the Transaction Details page (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers > Edit > Transactions tab > view an expenditure transaction**):

Transaction Details	
Fund	ACKERMAN CENTER PROCESSING 15
Type	Expenditure
Transaction Section	
Transaction Amount	Amount 9.80 USD (VAT 0.00)
Related Records	
Related record	-
Transaction reference	-
Exchange Details Section	
Exchange Rate Information	
Source amount	9.80 USD (VAT 0.00)
Exchange rate	1.0
Exchange rate date	09/02/2014
Explicit Ratio	No
Fund Details Section	
Funding	
Fund	ACKERMAN CENTER PROCESSING 15
Reporting code	-
Transaction Details Section	
Creation information	
Transaction time	08/08/2014 15:45:58 CDT
Transaction note	-

Figure 74 – Exchange Rate Detail Fields in Alma

Creation Date and Due Date Enhancements

Description

The following changes have been implemented to the **Borrowing Creation Date** and **Borrowing Due Date** dimensions of the **Borrowing Requests** subject area and the **Lending Creation Date** and **Lending Due Date** dimensions of the **Lending Requests** subject area:

- If the **Creation Date** and **Due Date** fields are left empty, they appear as a blank (null value) in the report rather than 1/1/11 as they did previously.
- The order of the fields has been changed to be clearer and more logical.
- The words **to be deprecated** have been added to fields that will be deprecated in the near future. These columns should not be used.

- The names of all date fields, as displayed in the following table, have been modified to be clearer. (Previously, users needed to rename the field when creating reports since all date fields were named `date key xxx`. The names are now comprehensible.)

New Name	Previous Name
Borrowing/Lending Creation/Due Date	Date Key
Borrowing/Lending Creation/Due Month Key	Month Key
Borrowing/Lending Creation/Due Month	Month Desc
Borrowing/Lending Creation/Due Full Month	Full Month Desc
Borrowing/Lending Creation/Due Quarter	Quarter Desc
Borrowing/Lending Creation/Due Year	Year Desc
Borrowing/Lending Creation/Due Fiscal Year	Fiscal Year Desc

Note: These changes are planned for all the date fields across all subject areas as part of the Analytics roadmap to create a consistent experience for report creation.

The changes in the names of the fields should have no impact on existing reports that use these fields, unless the fields were used as part of an SQL statement. If you nevertheless experience errors with existing reports, it is recommended that you try to replace the existing fields with the renamed ones.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Borrowing/Lending Creation Date and Borrowing/ Lending Due Date dimensions in Alma Analytics:

Select **Borrowing Requests > Borrowing Creation Date and Due Date** and **Lending Requests > Lending Creation Date and Due Date**.

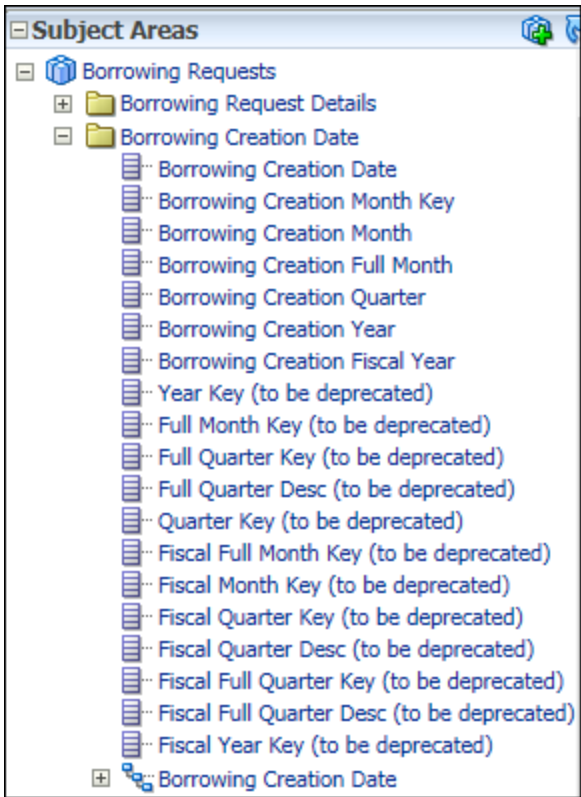


Figure 75 – Borrowing Creation Date

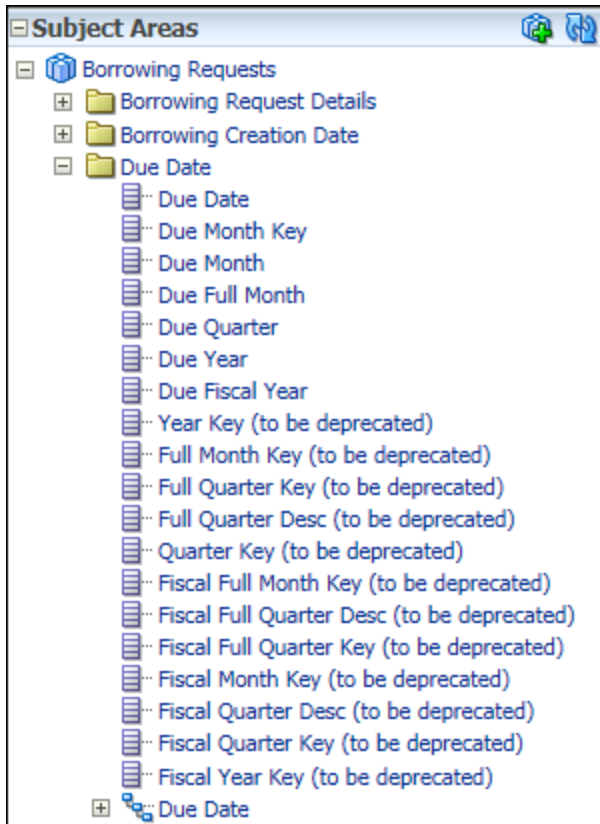


Figure 76 – Borrowing Due Date

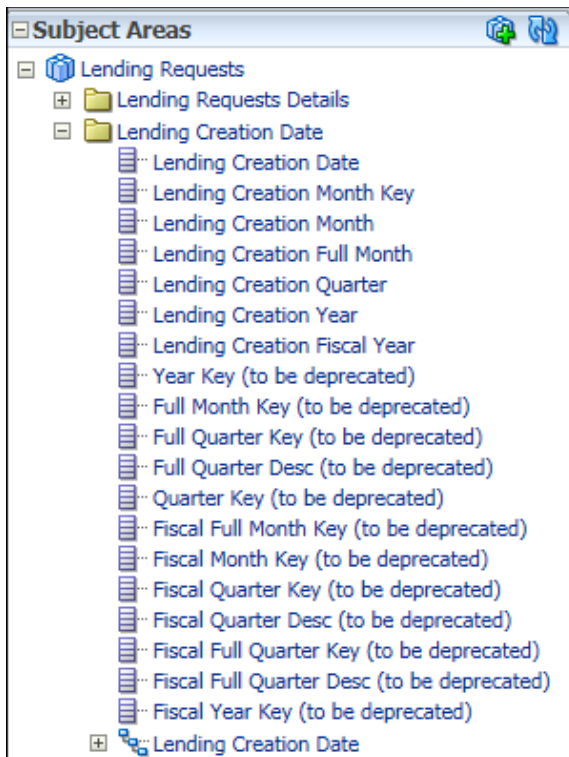


Figure 77 – Lending Creation Date

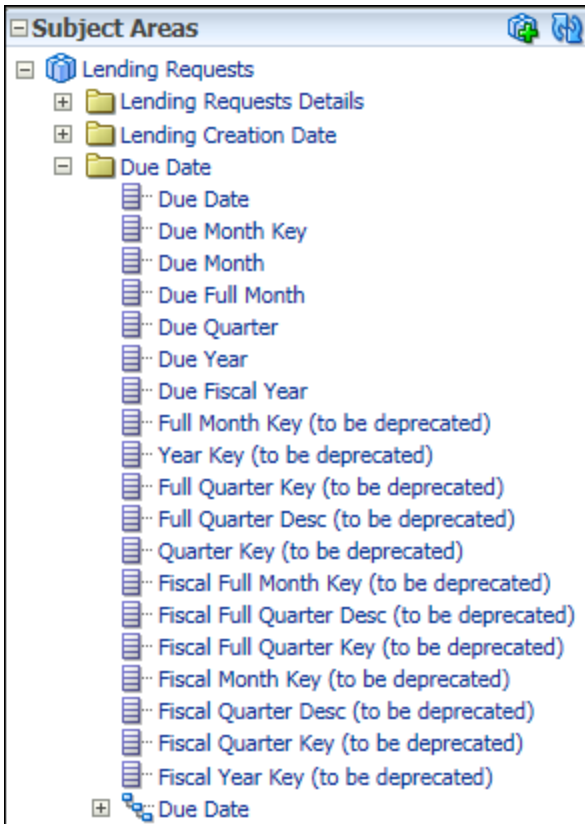


Figure 78 – Lending Due Date

Fulfillment Subject Area Enhancements

Description

The following changes have been implemented in the Fulfillment subject area:

- The following folders have been renamed in the Fulfillment subject area:

New Name	Previous Name
Patron Detail (to be deprecated)	Patron Detail
Owner Library (to be deprecated)	Owner Library
Item Location	Location
Borrower Details	User Details
Loan Operator Details	Loaned By
Return Operator Details	Returned By

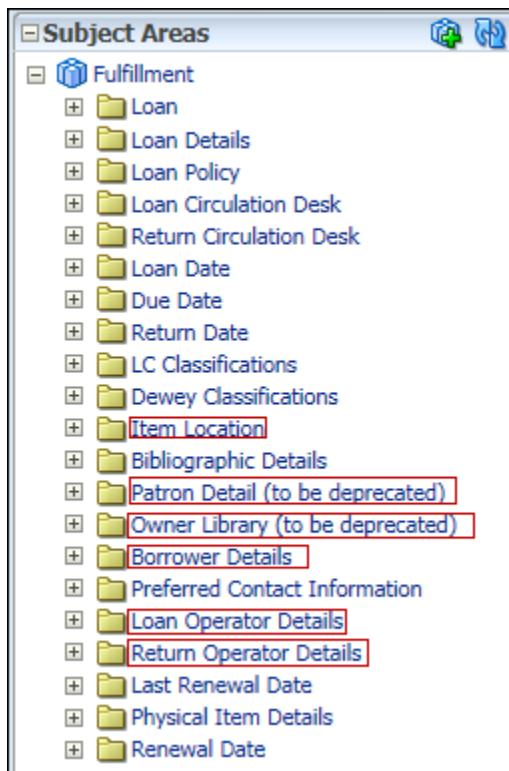


Figure 79 – Fulfillment Renamed Folders

- The following changes have been implemented to the **Loan Date**, **Due Date**, **Return Date**, and **Last Renewal Date** dimensions of the **Fulfillment** subject area:
 - If the **Loan Date**, **Due Date**, **Return Date**, and **Last Renewal Date** fields are left empty, they appear as a blank (null value) in the report rather than 1/1/11 as they did previously.
 - The order of the fields has been changed to be clearer and more logical.
 - The words **to be deprecated** have been added to fields that will be deprecated in the near future. These columns should not be used.
 - The names of all date fields, as displayed in the following table, have been modified to be clearer. (Previously, users needed to rename the field when creating reports since all date fields were named `date key xxx`. The names are now comprehensible.)

New Name	Previous Name
Loan/Due/Return/Last Renewal Date	Date Key
Loan/Due/Return/Last Renewal Month Key	Month Key
Loan/Due/Return/Last Renewal Month	Month Desc
Loan/Due/Return/Last Renewal Full Month	Full Month Desc
Loan/Due/Return/Last Renewal Quarter	Quarter Desc
Loan/Due/Return/Last Renewal Year	Year Desc
Loan/Due/Return/Last Renewal Fiscal Year	Fiscal Year Desc

Note: These changes are planned for all the date fields across all subject areas as part of the Analytics roadmap to create a consistent experience for report creation.

The changes in the names of the fields should have no impact on existing reports that use these fields, unless the fields were used as part of an SQL statement. If you nevertheless experience errors with existing reports, it is recommended that you try to replace the existing fields with the renamed ones.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Loan Date, Due Date, Return Date, and Last Renewal Date dimensions in Alma Analytics:

Select **Fulfillment > Loan Date, Due Date, Return Date, and Last Renewal Date:**

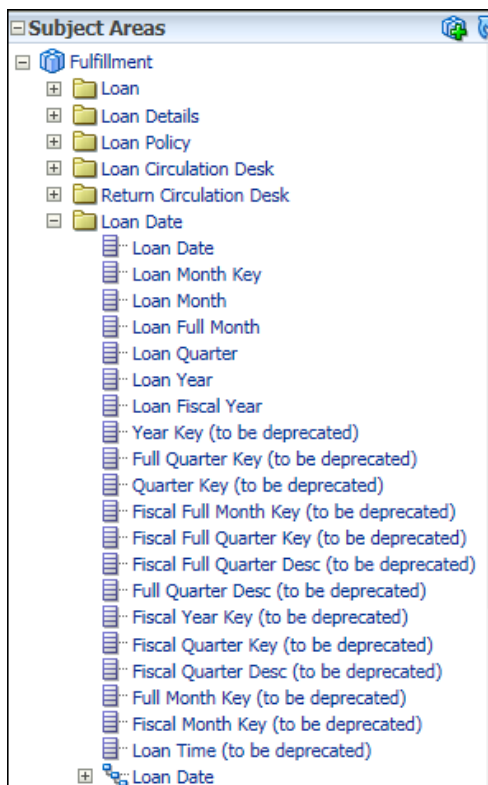


Figure 80 – Loan Date

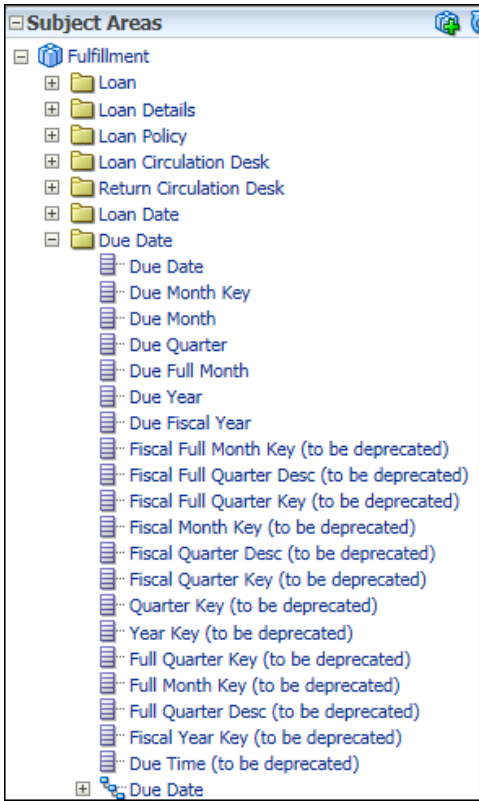


Figure 81 – Due Date

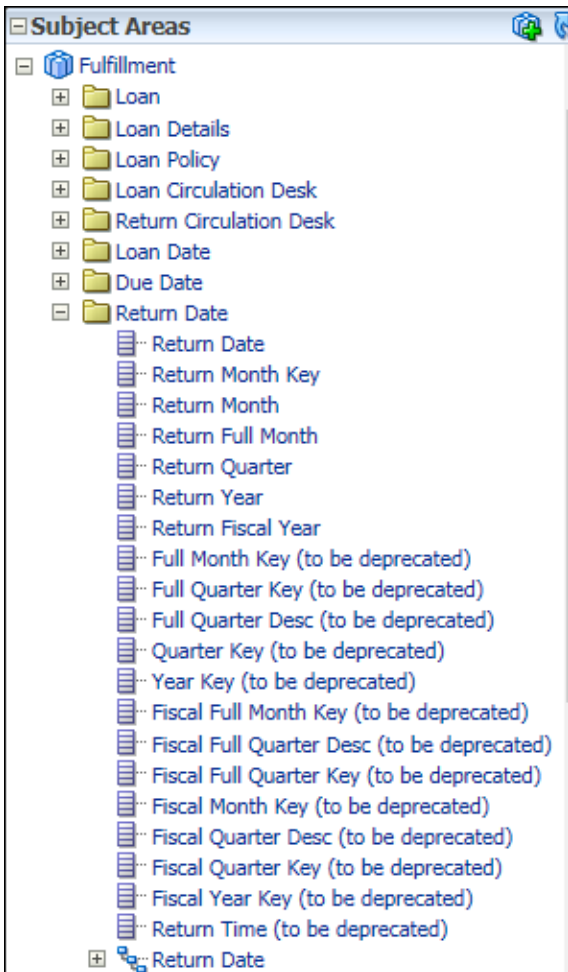


Figure 82 – Return Date

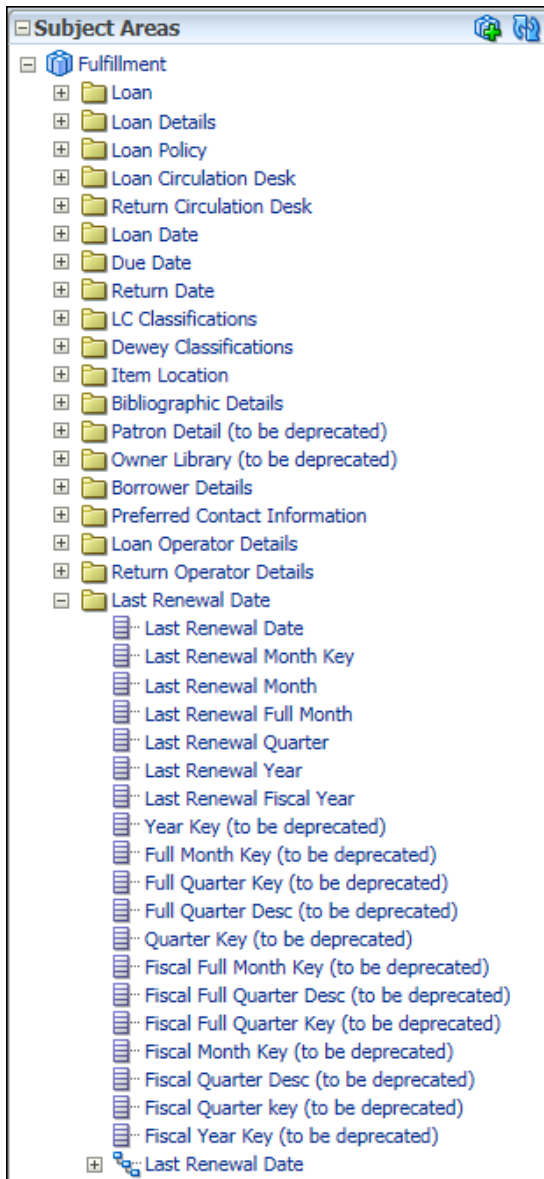


Figure 83 – Renewal Date

Resource Sharing Fields Added to Shared User Details Dimension

Description

The **Resource Sharing Library Code** and **Resource Sharing Library** fields have been added to the User Details shared dimension that is located in the following locations:

- Fulfillment > Borrower Details

- Borrowing Requests > User Details
- Fine and Fees > User Details
- Requests > Requester
- Users > User Details

These fields hold information concerning the resource sharing library assigned to the user.

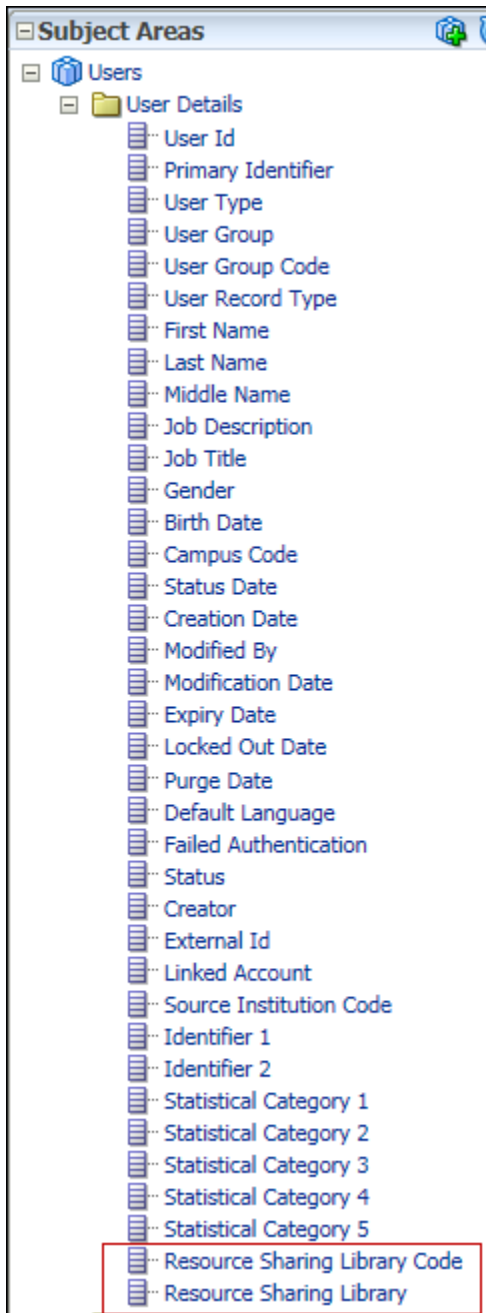
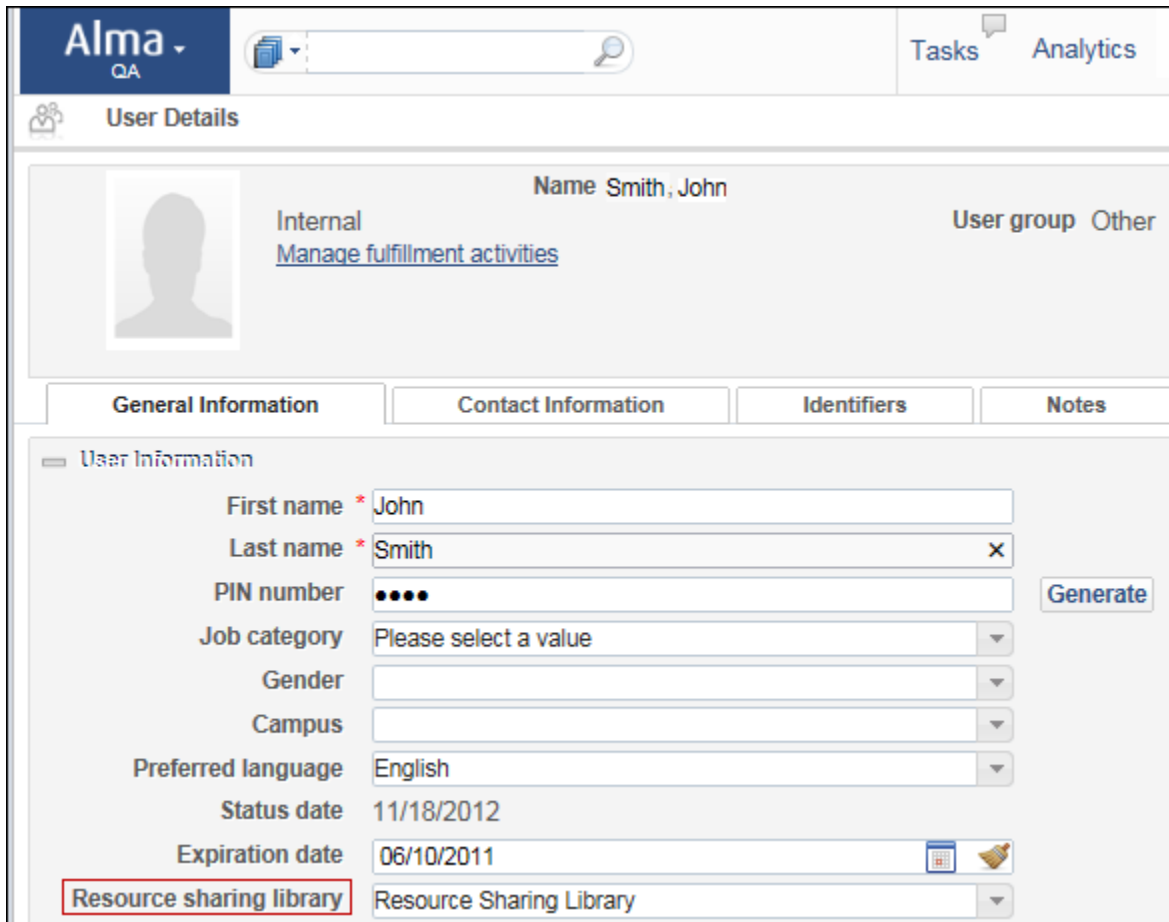


Figure 84 – Resource Sharing Library and Resource Sharing Library Code

Technical Instructions

The Design Analytics role can access this enhancement.

Users are assigned a resource sharing library in the User Details page (**Administration > User Management > Find and Manage Users > Edit**):



The screenshot displays the 'User Details' page in the Alma system. At the top, the Alma logo and 'QA' are visible on the left, and 'Tasks' and 'Analytics' are on the right. Below the header, the user's name 'Smith, John' is shown, along with 'Internal' and 'User group Other'. A 'Manage fulfillment activities' link is present. The main content area is divided into tabs: 'General Information', 'Contact Information', 'Identifiers', and 'Notes'. Under the 'General Information' tab, the 'User Information' section contains several fields: 'First name *' (John), 'Last name *' (Smith), 'PIN number' (masked with dots), 'Job category' (Please select a value), 'Gender', 'Campus', 'Preferred language' (English), 'Status date' (11/18/2012), 'Expiration date' (06/10/2011), and 'Resource sharing library' (Resource Sharing Library). The 'Resource sharing library' field is highlighted with a red border. A 'Generate' button is located to the right of the PIN number field.

Figure 85 – Resource Sharing Library in Alma

The **Resource Sharing Library Code** and **Resource Sharing Library** fields are configured on the Organization Unit Details page when configuring libraries (**Administration > General Configuration > Configuration Menu > Libraries > Add a Library or Edit Library Information > Libraries tab > Edit**):

Organization Unit Details

Organization Unit Name: Resource Sharing Library Organization Unit Type: [Blank]

Summary Contact Information Calendar Management IP Definitions

General Details

Organization Unit Name: Resource Sharing Library

Code: RES_SHARE

Description: Temporarily manages inventory that is sent to or received from resource sharing partners

Default Location for Acquisition: [Dropdown]

Proxy: [Dropdown]

Figure 86 – Resource Sharing Library and Resource Sharing Library Code in Alma

The following is an example report using the **Resource Sharing Library Code** and **Resource Sharing Library** fields:

Resource Sharing Library Code	Resource Sharing Library
RES_SHARE	Resource Sharing Library

Figure 87 – Resource Sharing Library and Resource Sharing Library Code Report

Note: If a user has multiple resource sharing libraries, they appear concatenated by a semicolon.

Fields Added to Borrowing and Lending Requests Subject Area

Description

The following fields have been added to the **Borrowing Request Details** dimension of the **Borrowing Requests SA**:

- Shipping Cost
- Shipping Cost Currency
- External Identifier – the ID of the library that fulfills the borrowing request

The following fields have been added to the **Lending Request Details** dimension of the **Lending Requests SA**:

- Shipping Cost

- Shipping Cost Currency

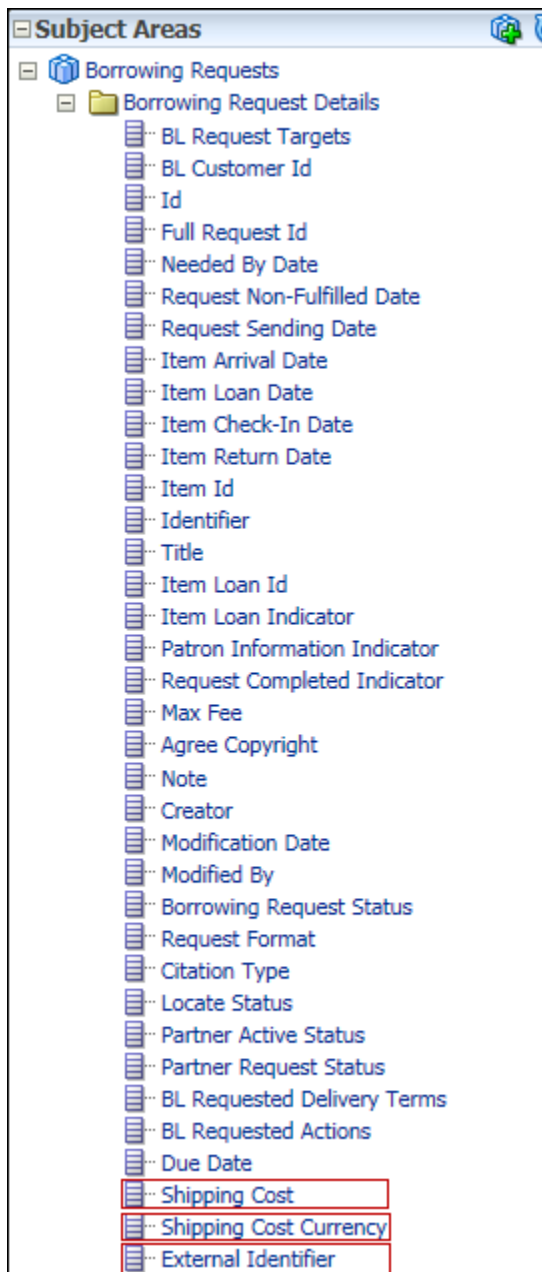


Figure 88 – Shipping Cost, Shipping Cost Currency, and External Identifier

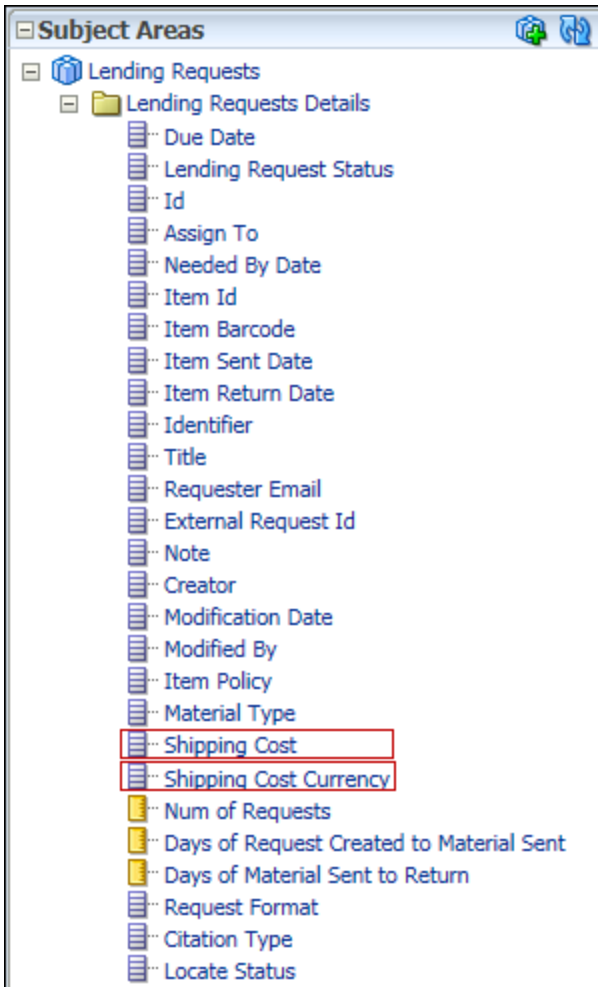


Figure 89 – Shipping Cost and Shipping Cost Currency

Technical Instructions

The Design Analytics role can access this enhancement.

These fields are taken from the Resource Sharing Borrowing and Lending Request pages (**Fulfillment > Resource Sharing > Borrowing Request** and **Lending Request > View**):

Request Attribute	
Title	"Dear Starrett-" "Dear Briggs-" : a compendium of correspondence between Vincent Starrett and Gray Chandler Briggs, 1930-1934 : together with various appendices, notes, and embellishments
Requester	Rzepka, Charles crzepka
Owner	Resource Sharing Library
Partner	NRE Mugar Library
Request Status	Request Completed
External Identifier	276822
Internal Identifier	9339918270001161
Requested Format	Physical
Supplied Format	Physical
Allow Other Format	No
Preferred Send Method	-
Needed By	-
Delivery Location	Deliver to library
Pickup At	-
Shipping Cost	0.00 USD
Willing to Pay	No
Due date	-
Agree to Copyright terms	Yes
Needs patron information	No
Request Note	-
Maximum Fee	-

Figure 90 – Shipping Cost and External Identifier Report in Alma

The following is an example report using the **Shipping Cost**, **Shipping Cost Currency**, and **External Identifier** fields:

Shipping Cost Currency	Shipping Cost	External Identifier
USD	0	223371
	0	223568
	0	223831
	0	223851
	0	223914
	0	223956
	0	223962
	0	224232
	0	224250
	0	224255
	0	224258
	0	224260
	0	224265
	0	224288

Figure 91 – Shipping Cost, Shipping Cost Currency, and External Identifier Report

Alma APIs

The following section describes the Alma API enhancements provided in the January 2015 release.

Alma RESTful APIs

- For the January release, all SOAP APIs have been migrated to RESTful APIs and are now considered deprecated.

In addition, if you still use REST directly with Alma, you must modify your requests to use the API Gateway with the API-key authentication method. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis>

- A Delete Order API was added, enabling the cancelation of a PO line via API (`DELETE /acq/po-lines`). For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>
- An Update Order API was added, enabling the update of an existing PO line via API (`PUT /almaws/v1/acq/po-lines/{po_line_id}`). For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>
- An Update Item API (`PUT /bibs/{MMS_ID}/holdings/{holding_id}/items/{item_id}`) was added, enabling the update of item information, including an item's receive date, via API. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>
- Additional fields were added to the Retrieve Item Information API. For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>
- The total count of loans was added to the Get Loans for User RESTful API.

Collaborative Networks and Multicampus Institutions

The following sections describe Alma enhancements provided for collaborative networks and multicampus institutions in the January 2015 release.

Support Network Zone for Remote Digital Imports

Description

The **Use Network Zone** option has been added to remote digital import profiles. It allows you to import bibliographic records to the Network Zone (NZ) instead of the member institution. When stored in the NZ, a link is created from the member institution to the NZ bibliographic record, but the URL linking information for the remote digital representations is stored in the member institution.

Technical Instructions

The following roles can import remote digital inventory:

- Digital Inventory Operator and Digital Inventory Operator Extended
- Collection Inventory Operator and Collection Inventory Operator Extended
- Catalog Administrator (which allows you to add and modify import profiles)

To import bibliographic records for remote digital titles to the NZ:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Import Profiles** under **Record Import**.

The Run Import page opens.

- 2 Click **Add New Profile** to open the Import Profile Details page.
- 3 On page 1 of the wizard, select the **Remote Digital** option.
- 4 On page 2 of the wizard, fill in the import details for the digital records and select the **Use Network Zone** option.

Import Profile Details 1 2 3 4 Cancel Save Draft Next

Profile Type Remote Digital

Profile Details

Use Network Zone

Profile name *

Profile description

Library *

Remote digital repository * instance

Collection assignment *

Source format MARC21 Bibliographic

File Upload Method Upload File/s

File name patterns

Cross walk No Yes

Target format MARC21 Bibliographic

Active True

Cancel Save Draft Next

Figure 92 – Import Profile Details Page – Create New Import Profile

5 Click **Next** to continue.

☆ **Loaded women and addiction**
Jill Lynn Talbot c2007
● Check Find It For Availability

Book

Get It Details Reviews & Tags

WWU - Western Washington University Actions

Resource Sharing Request:

Resource Information:

Citation type: Book Article

Title: * Loaded women and addict

Author (Last name, first name): Talbot, Jill Lynn.

Author initials:

Edition:

Figure 93 – Resource Sharing Request Enriched with Metadata from NZ

Available For Group Information Available in the Community Zone Updates Task List

For multicampus or consortial network environments, Alma has added an **Available For** filter and a new **Available For** column to the Community Zone Updates Task List page (**Resource Management > Manage Inventory > Community Zone Updates Task List**).

The screenshot shows the 'Community Zone Updates Task List' interface. At the top, there are tabs for 'Review' and 'All'. Below the tabs, there are date range filters: 'Submit Date from 12/07/2014 to 12/15/2014' with an 'Apply Filter' button. An 'Action' filter is set to 'Portfolio added to non auto-active package', and an 'Available For' filter is set to 'OHSU'. The main table has the following columns: Report type, Electronic Collection Name, Title, Identifier, Submit Date, and Available For. The 'Available For' column lists groups: OHSU; WWU; MRY.

Report type	Electronic Collection Name	Title	Identifier	Submit Date	Available For
1 Portfolio added to active package	-	-	-	-	OHSU; WWU; MRY
2 Portfolio added to active package	Elsevier ScienceDirect Books	Online Arab Spri	1-84334-757-1	12/15/2014	OHSU; WWU; MRY
3 Portfolio added to active package	Elsevier ScienceDirect Books	Rapid Sensory F Techniques	1-78242-248-X	12/15/2014	OHSU; WWU; MRY
4 Portfolio added to active package	Elsevier ScienceDirect Books	Electron Beam F and Complemen Processing Tech	1-78242-100-9	12/15/2014	OHSU; WWU; MRY

Figure 94 - Available For Filter and Available For Column

With the **Available For** filter, you can choose to display the Community Zone Updates Task List by group. The **Available For** filter works in combination with any selections that you have made with the **Action** filter.

The display of the **Available For** filter and the **Available For** column is effective with the January release starting on 4-January-2015. If you choose to view the Community Zone Updates Task List with a date range prior to 4-January-2015, the **Available For** filter and the **Available For** column will not display.

The groups that display in the **Available For** column reflect the most current Available For information effective with the most recent harvesting. This is the harvesting that runs on the CKB data every week after midnight on Sunday.

Coverage Statement Added to Available For Group Information in Staff Search Results

In multicampus and consortial network environments, Alma has been enhanced to include portfolio coverage information as it relates to the Available For group(s) in Repository Search results. Refer to the illustration below for an example.

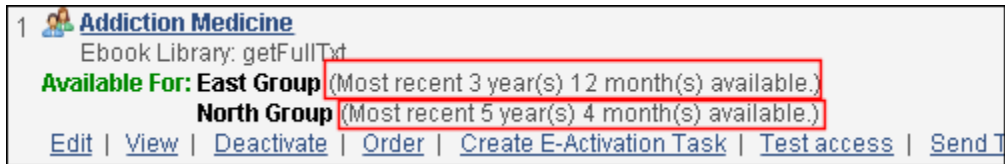


Figure 95 - Available For Coverage Statement

Available For Service Level Added to Electronic Collection Search Results

When Available For groups settings are specified at the service level, they now display in the search results of the electronic collection to which they are attached. Since Available For settings at the service level override the Available For settings at the electronic collection level, it is beneficial to see the service level settings in the electronic collection search results in order to know who has access to the electronic resource because it is possible for the electronic collection and electronic service Available For group settings to be different. Refer to the illustrations below.

The electronic collection search results for this example are:

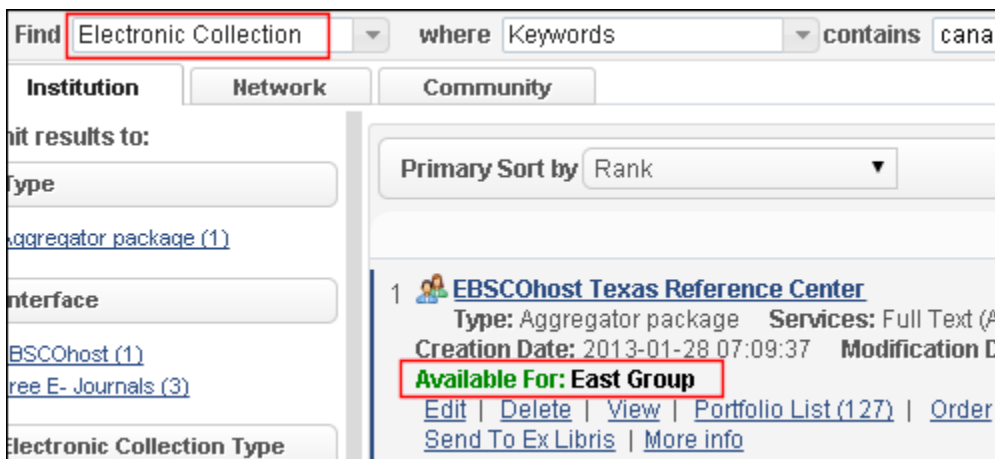


Figure 96 - Electronic Collection Search Results with Available For Service Level Indicated

The electronic collection (*EBSCOhost Texas Reference Center*) Available For Group Setting is **North Group** in the following example:

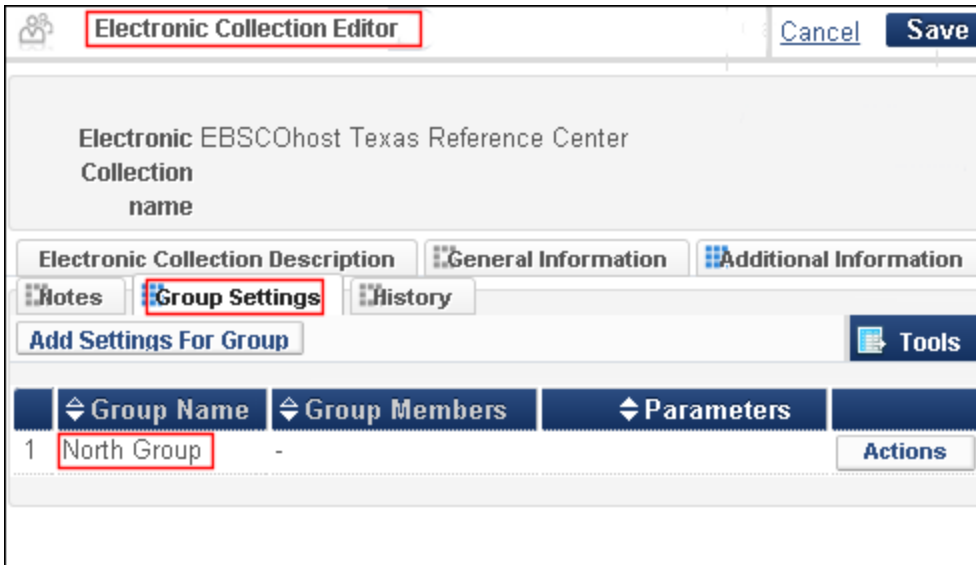


Figure 97 - Available For Group Setting for Electronic Collection

The electronic service Available For Group Setting for *EBSCOhost Texas Reference Center* is **East Group** in the following example:

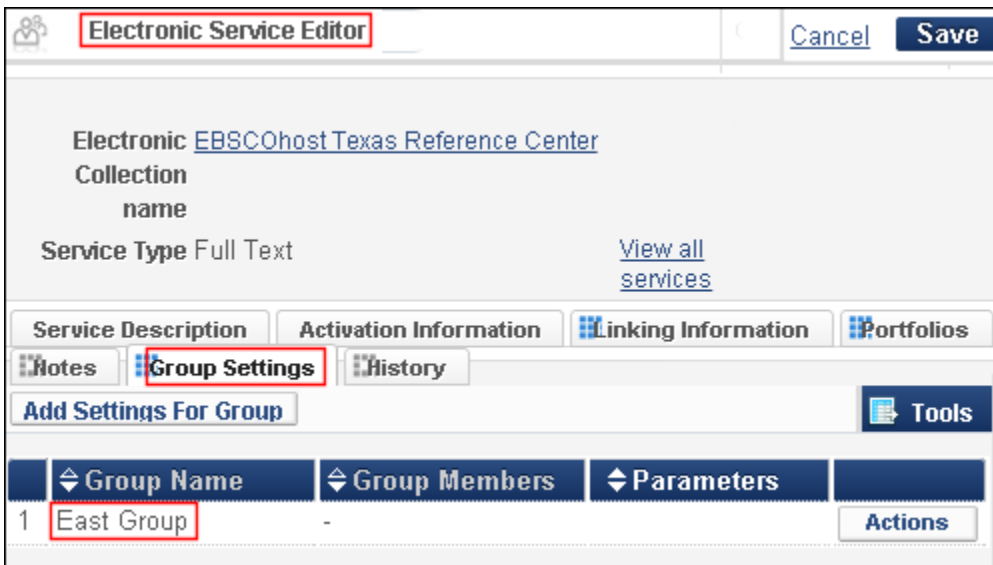


Figure 98 - Available For Group Setting for Electronic Service

Since the electronic service Available For Group Setting overrides the electronic collection Group Setting, the electronic collection search results in [Figure 96 - Electronic Collection Search Results with Available For Service Level Indicated](#) display **East Group**, the electronic service level setting (that takes priority).

Other Collaborative Network Enhancements

- For resource sharing requests and general electronic services, the Alma resolver will now enrich these requests and services in the Get It tab with the metadata found in the matching Network Zone (NZ) record if the record is not found in the member institution. Previously, no metadata was attached when the record was not found in the member institution.

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.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.
- Currently, Legal Deposit claim notifications are sent for one-time-order items only. Claim notifications for continuous-order items will be available in a future Alma release.
- Available For groups defined for electronic collections and services are both displayed sporadically in an electronic collection search, although only service-level Available For groups should be displayed.

Fixed Issues

The following previously known issues have been fixed:

- The LCCN match method does not work for the new Overlap Analysis feature.
- Z39 reports indicate that all searches have been executed from an IP address of 127.0.0.1.