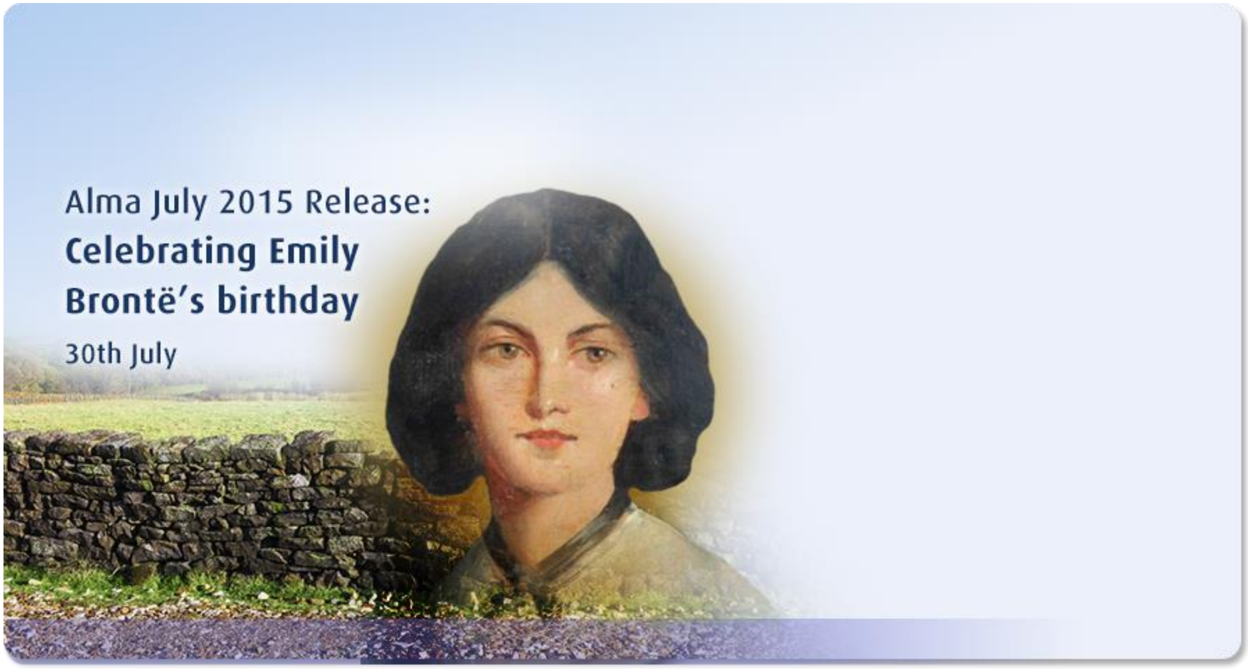

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Table of Contents

Alma July 2015 Release Highlights

Acquisitions

- **Support for EDI Claims** – It is now possible to send claims by EDI for vendors that support this option. EDI claims can be used for both one-time and continuous orders.
- **Library-Level Invoices**– Institutions might like to limit access to sensitive data to users at specific libraries. It is now possible to associate invoices with a specific library. An invoice now includes an Owner field, indicating the institution or library with which it is associated. A user can select the value for this field when creating the invoice. The field appears as a column and as a facet on any page that displays a list of invoices.
- **User-Defined License Terms** – Alma now enables you to add user-defined license terms. This allows the institution to modify the license to fit differing regulations and institutional policies.

Resource Management

- **Contributing Electronic Collections of Database Type to the Community Zone** – With the July release, local electronic collections that represent databases can be contributed to the Community Zone for the wider use of the community. As we update you about this new feature in Alma we are happy to inform you that we already have three contributions to the CZ from California State University San Marcos and KU Leuven:
  - Open Textbook Library collection
  - Kluwer Navigator collection
  - Revues Armand Colin collection

  You can now find these collections as part of the Community Zone for your own use. If you have local electronic collections that will benefit the wider community be sure to post them to the Community Zone.
- **Cataloging Privileges** – Prior to the July release, every cataloger with the appropriate roles could edit bibliographic and authority records. This new functionality gives you the option to define a cataloging privileges hierarchy for better control of the privilege to edit bibliographic and authority records. This is handled through cataloging level code assignments in Resource Management.
- **New Resource Type Field** – A new field called Resource Type has been added to Alma. The Resource Type is based on existing bibliographic fields such as the LDR and 008. This new field supplements (but does not replace) the existing Material Type field. It is searchable,

available as a facet, and is extracted to Analytics. This new field is much more detailed than the existing Material Type field. As a result, it will be a useful means of constructing detailed reports.

- **Digital Inventory and Collection Enrichment for Publishing Profiles** – It is now possible to enrich publishing profiles for digital inventory for the purpose of integrating with third-party systems.
- **Publishing OAI-DC in OAI-PMH** – Alma publishing platform now supports OAI-DC, which can be useful when integrating Alma with third-party systems.
- **Mapping Digital Resources to Collections During Import** – You can now add an imported bibliographic record of a digital item to an existing collection based on metadata content. This enhancement will allow for an improved, dynamic mapping of a resource to a collection as part of the ongoing metadata import processes. This eliminates the need to perform any retroactive, post load collection assignment of materials loaded.

Resource Sharing

- **Converting Hold Requests to Resource Sharing Borrowing Requests** – A hold request can now be converted to a resource sharing borrowing request when your library is not able to, or willing to, fulfill the request.
- **Restricting Resource Requests to a Reading Room** – Alma now supports restricting a patron's access for a received item from a resource sharing request to a reading room. When this feature is used, the patron's requested pickup location is replaced with the selected reading room location.
- **Support for a Resource Sharing Renewal Fee** – Alma now supports charging a fee when a patron renews a resource sharing item. The renew fee is added to the Borrowing Resource Sharing Terms of Use and automatically applied for any resource sharing renewal.

Administration

- **Send Notification to Users** – Alma can send notifications to a library-defined sets of users. The new User Notification Types table includes a default notification indicating that the receiver's password was changed. You can add additional notification types.

Collaborative Networks and Multicampus Institutions

- **Monitoring Collaborative Network Jobs Across Institutions** – The Network Zone can now monitor the jobs run by member institutions of a collaborative network.
- **Facilitate Switching Between Institutions** – Members of a collaborative network can now easily switch between member institutions for which they have a user account. In collaborative networks that use SAML single sign-on, users can switch between member institutions without having to log in separately to each institution.
- **Central Cataloging Enhancements** – With the July release, Alma provides additional support for collaborative networks that, as a central cataloging policy, only permit cataloging in the Network Zone, not the Institution Zone. With this new capability, Alma provides a new parameter setting for central record management that prevents institutions from creating local Institution Zone records.

Data Services

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma Community Zone during the period 31 May 2015 through 28 June 2015:

- BIBSAM American Chemical Society All 2014-2016
- BIBSAM American Physical Society Journals 2015-2016
- BIBSAM BrillOnline Journals 2014-2016
- BIBSAM British Medical Journals 2014-2016
- BIBSAM Cambridge University Press Journals Online 2015-2017
- BIBSAM De Gruyter Journals 2015
- BIBSAM Elsevier Cell Press 2014-2016
- BIBSAM Elsevier Journals Outside Freedom Collection 2014-2016
- BIBSAM Elsevier SD Freedom Collection 2014-2016
- BIBSAM Karger Medical And Scientific eJournals Complete 2014-2016
- BIBSAM Kluwer Law Journals 2013-2015
- BIBSAM Oxford University Press Journals 2015
- BIBSAM Oxford University Press Journals New Titles 2015
- BIBSAM Royal Society Publishing Journals 2014-2016
- BIBSAM Sage Premier 2014-2016
- BIBSAM Wiley Online Library Custom Collection 2014-2015
- CCC Get It Now Endocrine Society
- CCC Get It Now HealthCom Media
- CCC Get It Now Innovision Health
- CCC Get It Now Nova Science Publishers Inc
- CCC Get It Now Oncology Nursing Society
- CCC Get It Now University of South Carolina
- CCC Get It Now Wageningen Academic Publishers
- Colby, Bates and Bowdoin (CBB) SpringerLink Journals

- EdITLib Education & Information Technology Library Monographs
- Elsevier ScienceDirect Corporate Edition Book Collection
- IEEE Xplore ASPP Legacy
- ISU Digital Commons Journals
- JISC Collections Elsevier SD Agricultural And Biological Sciences 2012-2016
- JISC Collections Elsevier SD Biochem Genetics And Molecular Biology 2012-2016
- JISC Collections Elsevier SD Business Management And Accounting 2012-2016
- JISC Collections Elsevier SD Chemical Engineering 2012-2016
- JISC Collections Elsevier SD Chemistry 2012-2016
- JISC Collections Elsevier SD Computer Science 2012-2016
- JISC Collections Elsevier SD Decision Sciences 2014-2016
- JISC Collections Elsevier SD Earth And Planetary Sciences 2012-2016
- JISC Collections Elsevier SD Economics Econometrics And Finance 2012-2016
- JISC Collections Elsevier SD Energy 2012-2016
- JISC Collections Elsevier SD Engineering 2012-2016
- JISC Collections Elsevier SD Environmental Science 2012-2016
- JISC Collections Elsevier SD Freedom Collection 2012-2016
- JISC Collections Elsevier SD Health Sciences 2012-2016
- JISC Collections Elsevier SD Immunology And Microbiology 2012-2016
- JISC Collections Elsevier SD Materials Science 2012-2016
- JISC Collections Elsevier SD Mathematics 2012-2016
- JISC Collections Elsevier SD Mathematics Core 2012-2016
- JISC Collections Elsevier SD Neuroscience 2012-2016
- JISC Collections Elsevier SD Nursing And Health Professions 2012-2016
- JISC Collections Elsevier SD Pharmacology Toxicology And Pharmaceutics 2012-2016
- JISC Collections Elsevier SD Physics And Astronomy 2012-2016
- JISC Collections Elsevier SD Psychology 2012-2016
- JISC Collections Elsevier SD Social Science 2012-2016
- JISC Collections Elsevier SD Veterinary Science And Veterinary Medicine 2012-2016

- JISC Collections Institute of Physics Journal Archive 1874-1998
- JISC Collections Institute of Physics Option 1 2015
- JISC Collections Institute of Physics Option 2 2015
- JISC Collections Maney Archaeology Conservation And Heritage 2015-2017
- JISC Collections Maney Full Digital Archive 2015-2017
- JISC Collections Maney Health Sciences 2015-2017
- JISC Collections Maney Health Sciences Digital Archive 2015-2017
- JISC Collections Maney History Literature And Culture 2015-2017
- JISC Collections Maney Humanities And Social Sciences 2015-2017
- JISC Collections Maney Humanities And Social Sciences Digital Archive 2015-2017
- JISC Collections Maney Journals 2015-2017
- JISC Collections Maney Materials Science Engineering 2015-2017
- JISC Collections Maney Materials Science And Engineering Digital Archive 2015-2017
- JISC Collections Maney Philosophy Religion And Theology 2015-2017
- JISC Collections Wiley Online Library Full Collection:2015-2017
- JISC Collections Wiley Online Library Medicine and Nursing 2015-2017
- JISC Collections Wiley Online Library Smaller Collection:2015-2017
- JISC Collections Wiley Online Library SSH Collection 2015-2017
- JISC Collections Wiley Online Library STM Collection 2015-2017
- Medical Online E-Books Library
- Virginia Group SpringerLink Journals

New External Resources that Are Open for Searching

The following external resources were added for this release:

- GVK (Gemeinsamer Verbundkatalog)
- KERIS (KORMARC) – subscription required
- LIBIS network

Note: The Community Zone is now enriched with bibliographic records received from ProQuest for the e-brary e-collection holdings, adding approximately 170,000 full bibliographic records to the Community Zone.

Alma Videos

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

- **Alma HealthCheck Tool**
- **Library-Level Invoices**
- **Restricting Resource Requests to a Reading Room**
- **Converting Hold Requests to Resource Sharing Borrowing Requests**

Particular Issues to Note

Please note the following issues in the July release:

- As of this release, you can run the OCLC publishing profiles (**Publish bibliographic record (Batchload) to OCLC** and **Publish your local holdings records (LHRs) to OCLC**) only once a day. If you attempt to run one of these profiles more than once a day, you will receive an error message.
- The new Analytics Link Resolver subject area will be added to Alma in the August 2015 release.
- Spanish is 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 Spanish, you must activate the Spanish 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 Spanish is enabled, all patrons whose preferred language is defined as Spanish will be exposed to Alma patron-facing interface elements in Spanish.

Acquisitions

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

Support for EDI Claims

Description

Alma now supports another EDI type: claims sent to the vendor regarding missing items. For vendors that support this feature, claims are sent using EDI instead of by email. EDI claims can be used for both one-time and continuous orders.

A **Claims** check box was added to the vendor EDI information page to indicate that the vendor supports EDI claims. When set, Alma automatically sends claims to the vendor and ignores the existing configuration parameter `auto_claim` in Other Settings (**Acquisitions > Acquisitions Configuration > Configuration Menu > General**), which indicates to Alma to send emails for claims.

Note: When sending a claim from the Communications tab of the PO Line Summary page, the claim is sent by email regardless of whether the vendor is set to receive claims by EDI. Claims sent using EDI do not appear in this tab.

EDI claims are placed in the same directory as EDI orders. Both outgoing EDI message types currently use the same file naming scheme. Changes were made to the EDI's XML in order to distinguish between the different types of messages. Unlike orders, each EDI claim message contains a claim for a single PO line.

Step-by-Step Instructions

The following role can configure a vendor to support EDI claims:

- Vendor Manager

To configure a vendor to support EDI claims:

1. Follow the steps in the **To configure EDI communication with a vendor** procedure in the **Electronic Data Interchange (EDI)** section of the *Alma Integration with External Systems Guide* or the Alma online help.
2. While configuring the vendor in the **EDI Information** tab of the Vendor Details page, select **Claims** in the **Outgoing** section.

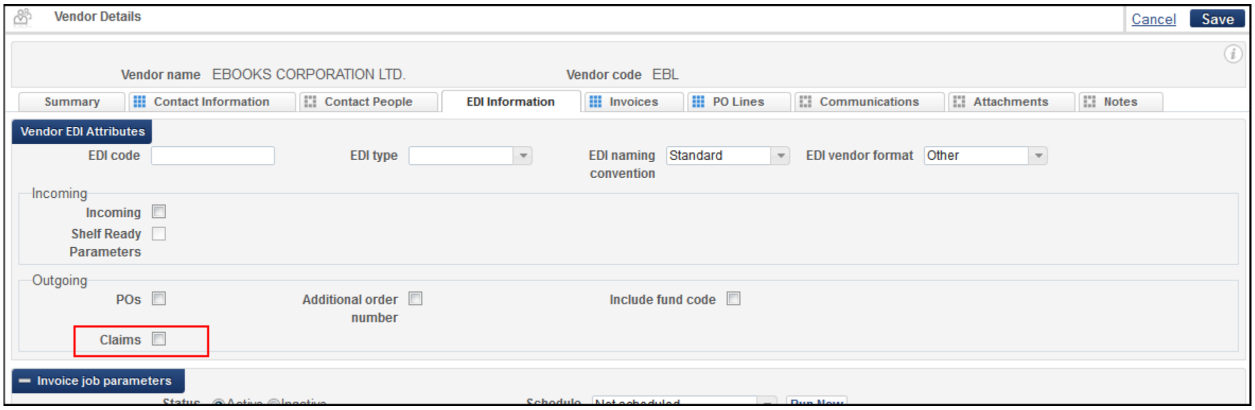


Figure 1 - EDI Information – Claims Field

3 Continue with configuring EDI communication.

Support for Invoice Line Discounts

Description

Alma now enables you to link non-regular invoice lines (such as **Discount**, **Shipment**, **Overhead**, and so forth) to a PO line. This enables you to link, for example, discount lines in the invoice to PO lines, and to see the discount line in the PO line's **Invoice Lines** tab.

Linking an invoice line to a PO line results in an encumbrance or a dis-encumbrance of the relevant amount from the relevant fund.

Step-by-Step Instructions

The following roles can link non-regular invoice lines to PO lines:

- Invoicing Manager
- Invoicing Operator

To link non-regular invoice lines to PO lines:

1 The procedure to link a non-regular invoice line to a PO line is exactly like the procedure that already exists to link a regular invoice line to a PO line; the feature was simply extended to non-regular invoice lines.

While adding an invoice line in the Add Invoice Line dialog box, or while editing an invoice line on the Invoice Line Details page (see **Creating an Invoice from a PO or Manually** or **Reviewing Invoices** in the *Alma Acquisitions Guide* or Alma online help), enter or search for the PO line number in the **PO line** field.

2 Continue as you would for a regular invoice line. Note that some fields that are not relevant for non-regular lines do not appear.

Library-Level Invoices

Description

Your institution may want to limit access to invoices to the users at specific libraries due to the sensitive nature of these invoices.

Alma now enables the following:

- New invoices to be associated with a specific library. Existing invoices (created before this change) are associated by default with the institution.
- User roles **Invoicing Operator**, **Invoicing Operator Extended**, and **Invoicing Manager** to be configured for a specific library. Users assigned to a specific library can manage only invoices associated with that library; users assigned to the institution can manage invoices associated with any library or with the institution.

  As with any other library-level role, a user can be assigned to multiple libraries by adding a role for each library. Existing users (before this change) are associated by default with the institution.

An invoice now includes an **Owner** field, indicating the institution or library with which it is associated. A user can select the value for this field when creating the invoice. The field appears as a column and as a facet on any page that displays a list of invoices (Find Invoices, In Review Invoices, and so forth).

Step-by-Step Instructions

The following roles can add a library-level invoicing role to a user:

- User Manager
- User Administrator

The following roles can manage an invoice's owner, for invoices that are within their scope:

- Invoicing Manager
- Invoicing Operator
- Invoicing Operator Extended

To add a library-level invoicing role to a user:

While adding or editing the role **Invoicing Manager**, **Invoicing Operator**, or **Invoicing Operator Extended** for a user (see **Managing User Roles** in the *Alma Administration Guide* or Alma online help), select the library at which the user can perform the role's functions from the **Scope** drop-down list on the User Role Details page. To add multiple libraries, add the role for each library. To add the entire institution, select the institution from the **Scope** drop-down list.

Note: If you reduce a user's scope to library-level from institution-level, or remove a library-level scope from a user, the user can no longer manage invoices that are assigned to him/her but are now out of scope.

To manage the owning library or institution of an invoice:

- **While creating** – When manually adding an invoice (see **Creating an Invoice from a PO or Manually** in the *Alma Acquisitions Guide* or Alma online help), select the owning library or the institution from the **Owner** drop-down list on the Invoice Details page of the creation wizard. Only libraries for which you have scope appear in the list.

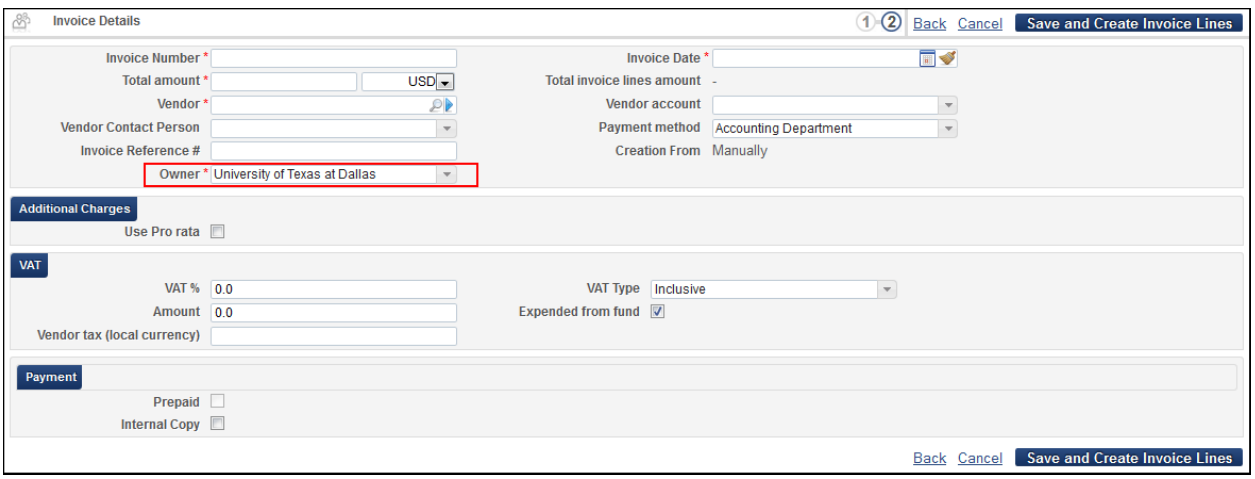


Figure 2 - Invoice Details with Owner Check Box

  For users with an institution-level scope, the drop-down list is set to the institution level by default. For users with a single library scope, the drop-down list contains only their library. For users with multiple library scopes, the drop-down list contains all of their libraries but is not set to any library by default. **Owner** is a mandatory field.

  Selecting an owner restricts the list of vendors, and vice versa.

- **While importing** – When you import invoices using EDI or from an Excel file, they are associated with the institution.

- **While viewing** – You cannot view, edit, or have assigned to you invoices that are out of your scope. When viewing a list of invoices, either after a search or on a specific page in

Alma, **Owner** appears as a column in the invoice list. Select a library under the **Owner** facet to filter the list.

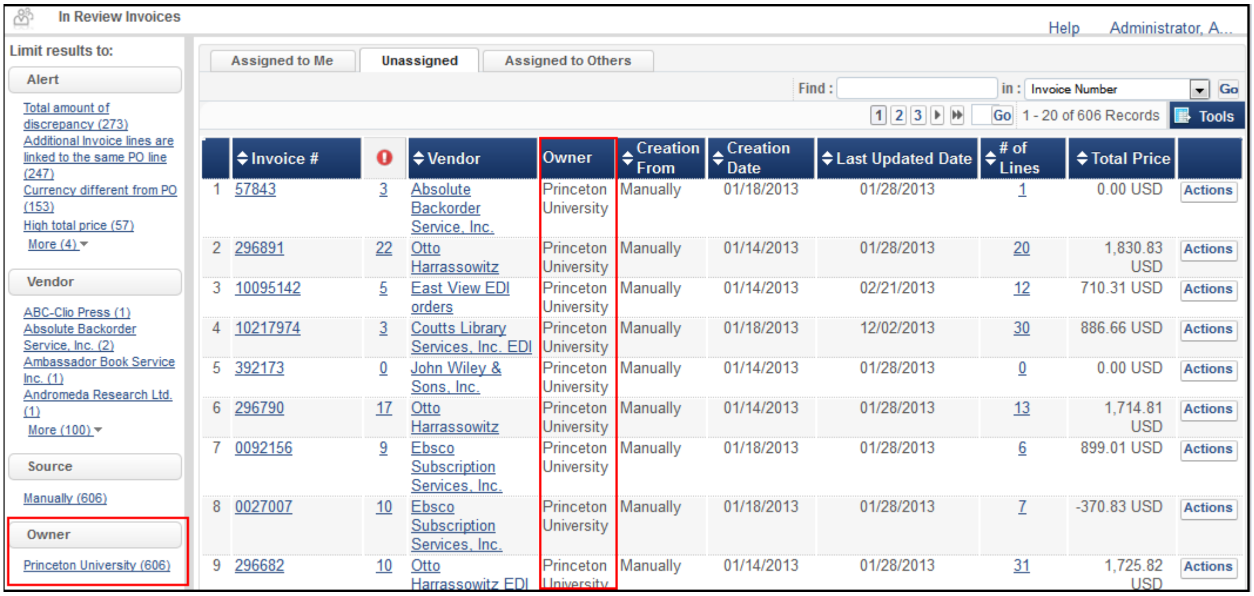


Figure 3 - Invoice List with Owner Column and Facet

New User-Defined License Terms

Description

Alma now enables you to add user-defined license terms.

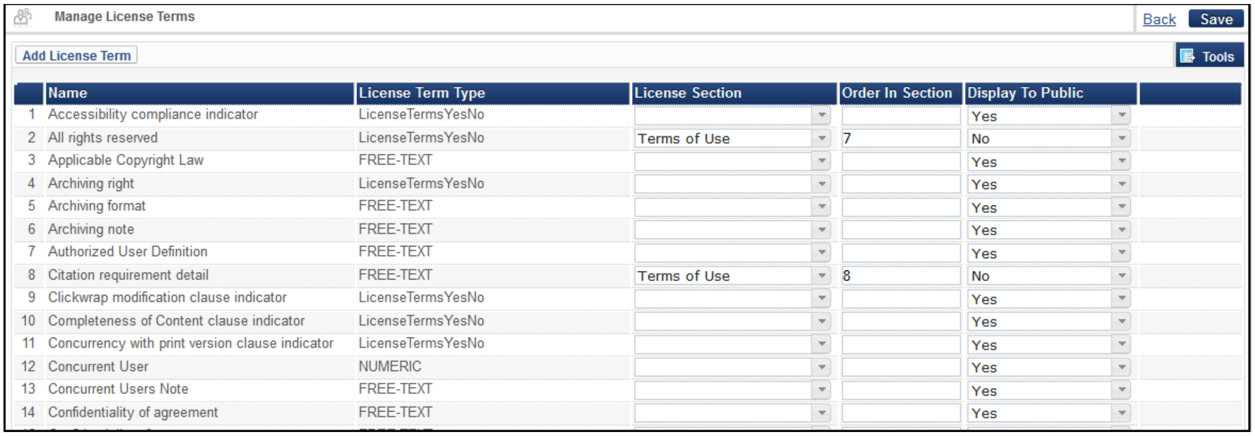
Main menu access to the **LicenseTermsType** mapping table (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Terms Type**) was replaced by the **Manage License Terms** page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Manage License Terms**). On this page, you can add and delete user-defined terms, and you can edit all license terms.

Step-by-Step Instructions

The following roles can manage user-defined license terms:

- Acquisitions Administrator
- General System Administrator

You manage license terms on the Manage License Terms page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Managed License Terms**).



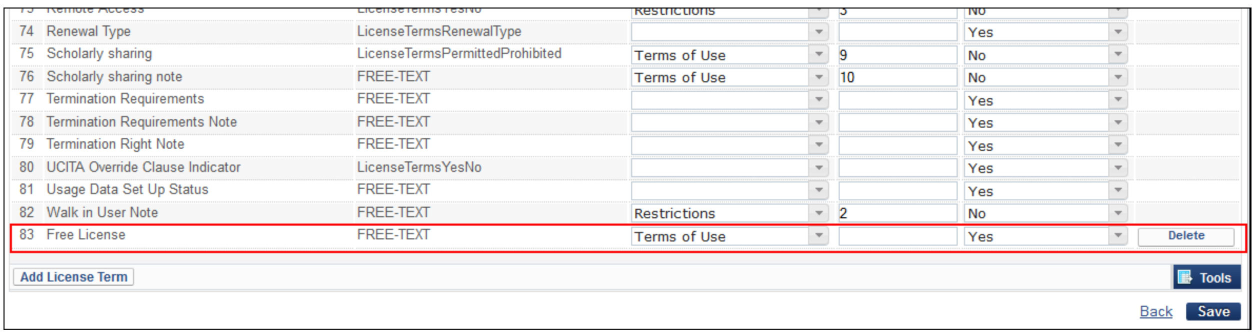
Manage License Terms

Add License Term

	Name	License Term Type	License Section	Order In Section	Display To Public
1	Accessibility compliance indicator	LicenseTermsYesNo			Yes
2	All rights reserved	LicenseTermsYesNo	Terms of Use	7	No
3	Applicable Copyright Law	FREE-TEXT			Yes
4	Archiving right	LicenseTermsYesNo			Yes
5	Archiving format	FREE-TEXT			Yes
6	Archiving note	FREE-TEXT			Yes
7	Authorized User Definition	FREE-TEXT			Yes
8	Citation requirement detail	FREE-TEXT	Terms of Use	8	No
9	Clickwrap modification clause indicator	LicenseTermsYesNo			Yes
10	Completeness of Content clause indicator	LicenseTermsYesNo			Yes
11	Concurrency with print version clause indicator	LicenseTermsYesNo			Yes
12	Concurrent User	NUMERIC			Yes
13	Concurrent Users Note	FREE-TEXT			Yes
14	Confidentiality of agreement	FREE-TEXT			Yes

Figure 4 - Manage License Terms Page

User-defined licesnse terms appear at the bottom of the list:



74	Renewal Type	LicenseTermsRenewalType			Yes	
75	Scholarly sharing	LicenseTermsPermittedProhibited	Terms of Use	9	No	
76	Scholarly sharing note	FREE-TEXT	Terms of Use	10	No	
77	Termination Requirements	FREE-TEXT			Yes	
78	Termination Requirements Note	FREE-TEXT			Yes	
79	Termination Right Note	FREE-TEXT			Yes	
80	UCITA Override Clause Indicator	LicenseTermsYesNo			Yes	
81	Usage Data Set Up Status	FREE-TEXT			Yes	
82	Walk in User Note	FREE-TEXT	Restrictions	2	No	
83	Free License	FREE-TEXT	Terms of Use		Yes	Delete

Add License Term

Figure 5 - User Defined License Term

Perform one or more of the following procedures. When you are done, click **Save**.

To add a term:

1 Click **Add License Term**. The Add License Term dialog box appears.

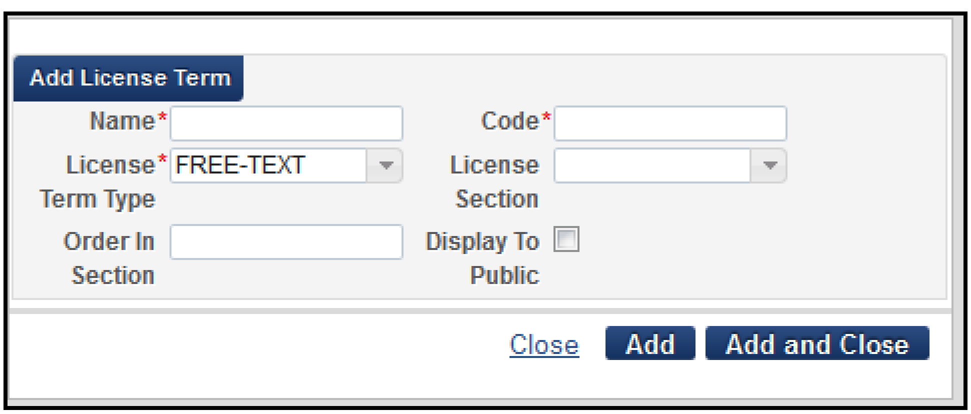


Figure 6 - Add License Term

2 Enter a term **Name** and a unique **Code**.

3 Select the **License Term Type**. The options are:

- **FREE-TEXT** – Free text
- **LicenseTermsPermittedProhibited** – Permitted or prohibited options
- **LicenseTermsRenewalType** – Renewal type ooptions
- **LicenseTermsUOM** – Calendar selection
- **LicenseTermsYesNo** – Yes or no options
- **NUMERIC** – A numeric field

Note that you cannot add new license term types. Also, once you save the license term, you cannot change its type.

4 Select the **License Section** in which the term will appear

5 Enter a sequence number in **Order in Section** to configure where, within the section, the term will appear.

6 Select **Display To Public** to have the term appear in the View It tab.

7 When you are done, click **Add and Close**. The term appears in the list of terms on the Manage License Terms page

To edit a term:

Select a new option for the term in the **License Section or Display to Public** columns, or edit the value of the **Order in Section** column.

To delete a term you added:

Click **Delete** in the term row. You cannot delete the out-of-the-box terms.

Other Acquisitions Updates

- PO line types **Electronic Book – Standing Order** and **Electronic Title – Standing Order** were removed because they were not clear and were not used.
- After sending a PO line, the expected activation date of the resource is updated to the expected activation date of the PO line.
- A negative number is now allowed for the discount on an invoice. This is useful for when you return an item that had a discount; the returned discount is “added” to the value.
- The mapping table SeviceClientIdentifier (**Administration > General Configuration > Configuration Menu > External Systems > Allowed Client IPs**) was removed.

Resource Management

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

Cataloging Privileges

Description

Prior to the July release, every cataloger with the appropriate roles could edit bibliographic and authority records. This new functionality gives you the option to define a cataloging privileges hierarchy for better control of the privilege to edit bibliographic and authority records. This is handled through cataloging level code assignments in Resource Management after Ex Libris staff set the cataloging level availability parameter for your system.

For collaborative network environments, the Network Zone system is able to manage the cataloging level code assignments centrally and distribute these assignments to all the members of the collaborative network.

With this feature of the system enabled, the following areas that deal with bibliographic and/or authority records are enhanced with this control of your records:

- MD Editor
- Metadata import (new records are imported with the lowest level)
- Quick cataloging
- Normalization/set management (batch job assignment of a code level to a set of records)

Step-by-Step Instructions

The following roles can work with cataloging level code assignments:

- Catalog Administrator
- General System Administrator

To create cataloging permission levels:

1 In the **Cataloging** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**), click **Cataloger Permission Level**.

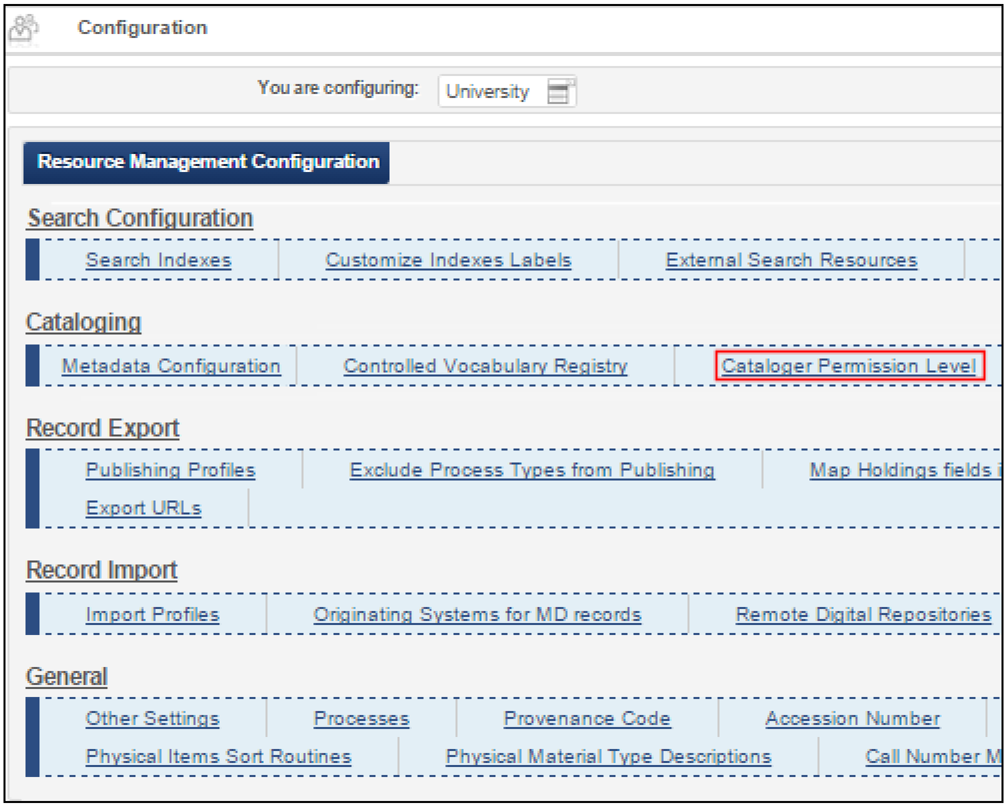


Figure 7 - Cataloging Permission Level

This configuration option is hidden until Ex Libris staff set the cataloging level availability parameter for your system.

For collaborative network environments, this configuration parameter is hidden from member institutions since this capability is managed at the Network Zone level.

2 Use the **Quick Add** section to create a new cataloging permission code level.

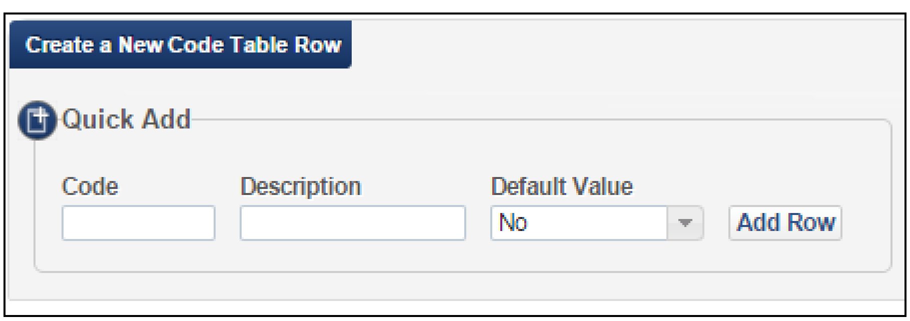


Figure 8 - Quick Add Cataloging Permission Level

a Enter a code number from 01 through 99. 00 is the lowest permission level and is reserved by Alma. 00 cannot be edited or deleted and is the default code level unless the default is changed to a different code level.

b Enter a description for the code level number to make it clear who is able to use this code level.

c Use the **Default Value** option to assign a default code level other than 00.

d Click **Add Row**.

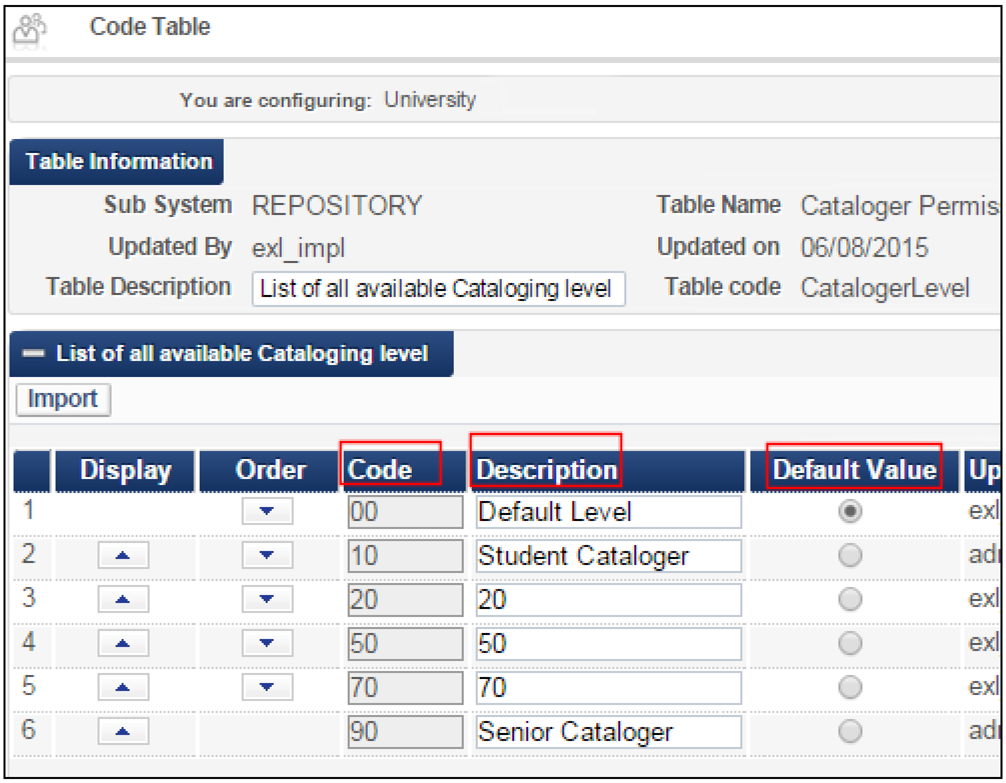


Figure 9 - Cataloging Permission Level Rows Added

3 When you have completed entering new cataloging permission levels, click **Save**.

For collaborative network environments, once the Network Zone administrator has completed entering the cataloging permission levels, these settings can be distributed to the member institutions by clicking **Save and Distribute**. This action submits a job to distribute these settings to the member institutions.

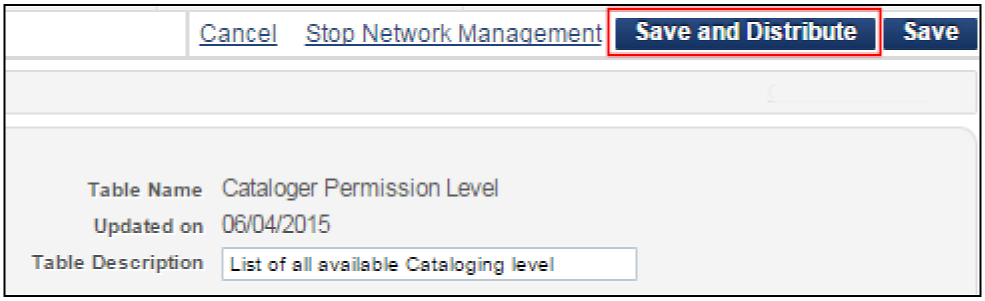


Figure 10 - Network Zone Distributes Cataloging Permission Levels to the Member Institutions with Save and Distribute

To assign cataloging permission levels:

1. Access the user records that you want to update (**Administration > User Management > Find and Manage Users**).
2. Select **Actions > Edit** for the user record that you want to update. The User Details page appears.

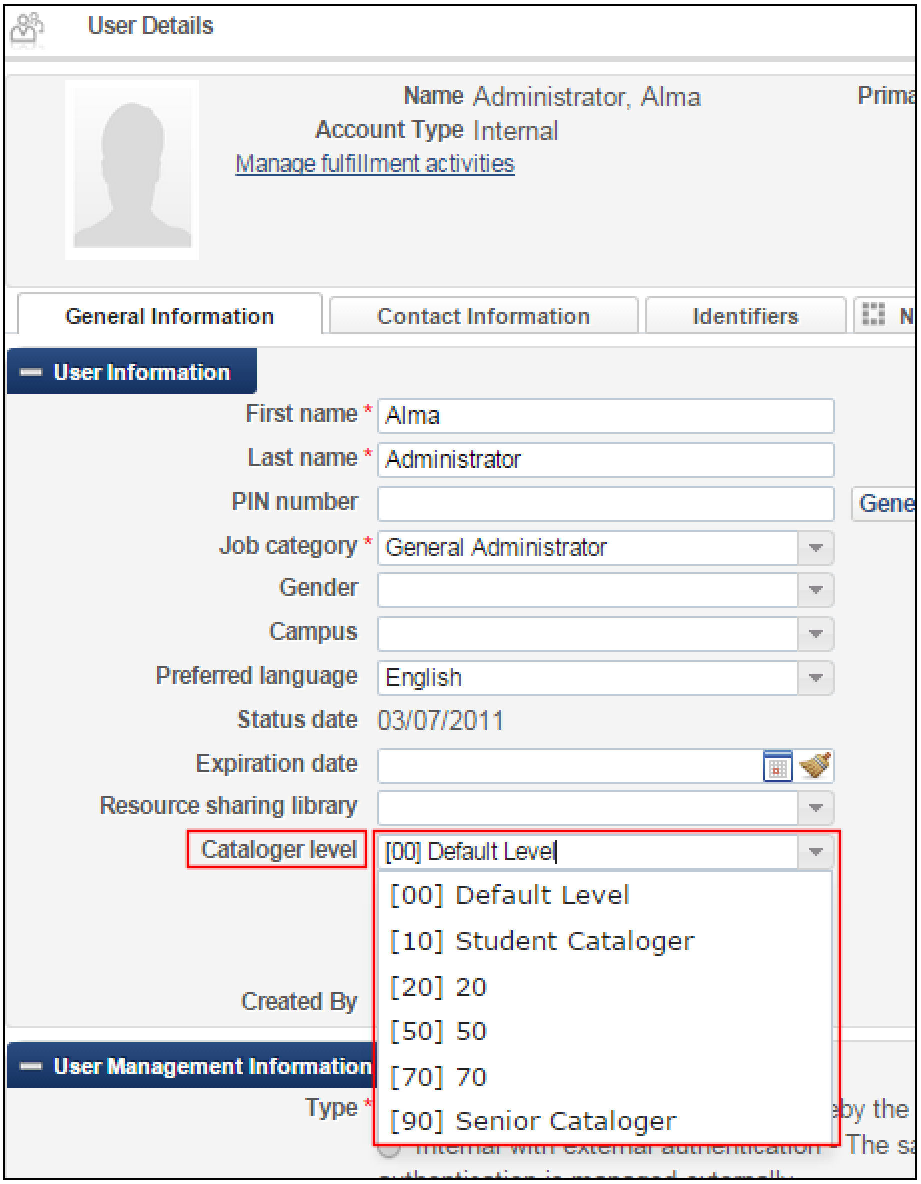


Figure 11 - Assign Cataloging Level to a User

3 Click **Save**.

To work with records in the MD Editor when cataloging permission levels have been implemented:

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

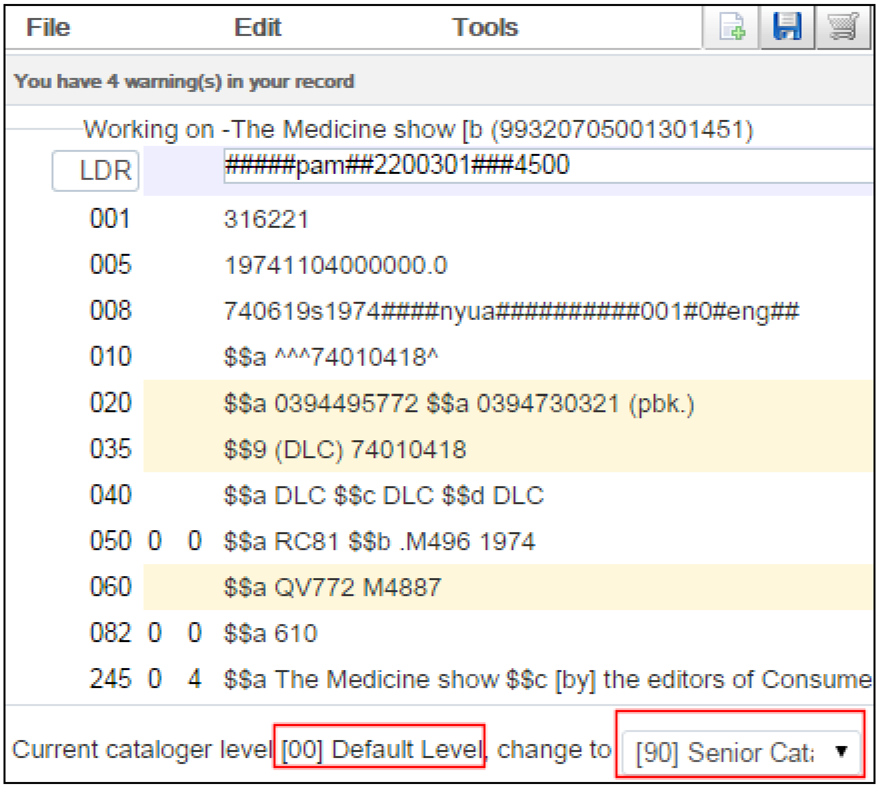


Figure 12 - Cataloging Permission Levels in the MD Editor

The MD Editor displays the current cataloging level. Any user assigned an equal or higher value cataloging level can edit the record. In addition, the MD Editor provides the option to change the cataloging level for the record. Any cataloging level equal to or below that of the cataloging level assigned to the user can be set as the cataloging level for the record.

If the user's cataloging permission level is lower than the cataloging level assigned to the record, the user can only view the record (see below).

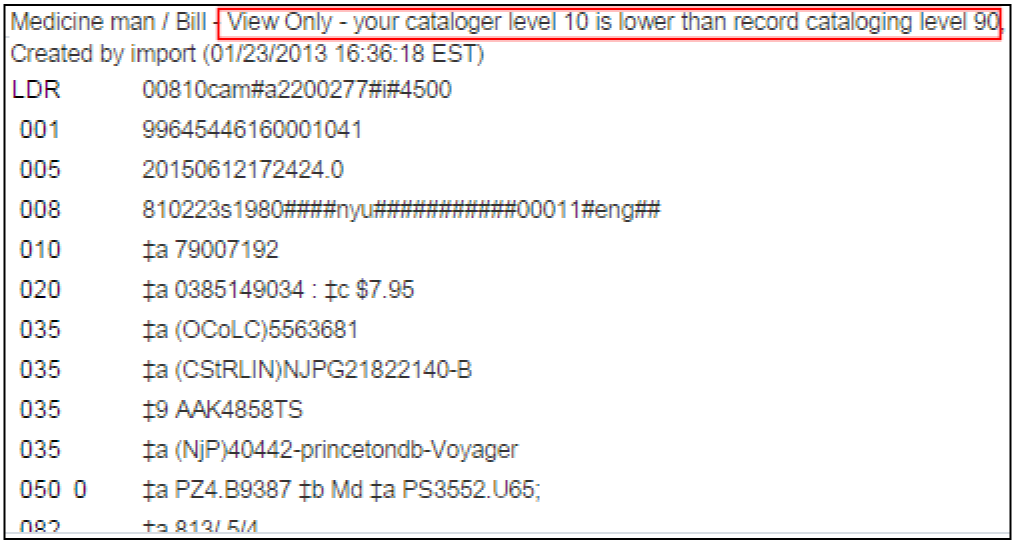


Figure 13 - User's Cataloging Permission Level Is Lower than the Cataloging Level Assigned to the Record

In a collaborative environment, however, a user with a lower cataloging permission level than the cataloging level assigned to the record in the Network catalog can add and remove local fields (see below).

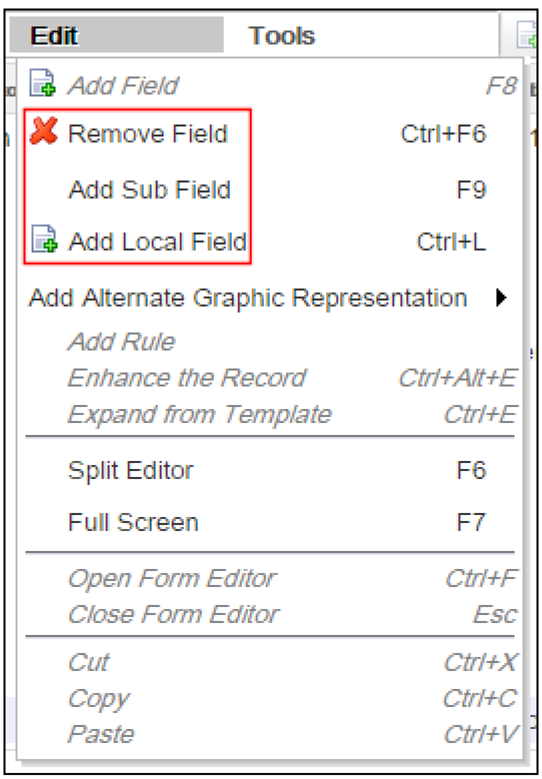


Figure 14 - Add/Remove Local Fields from a Network Zone Member Institution

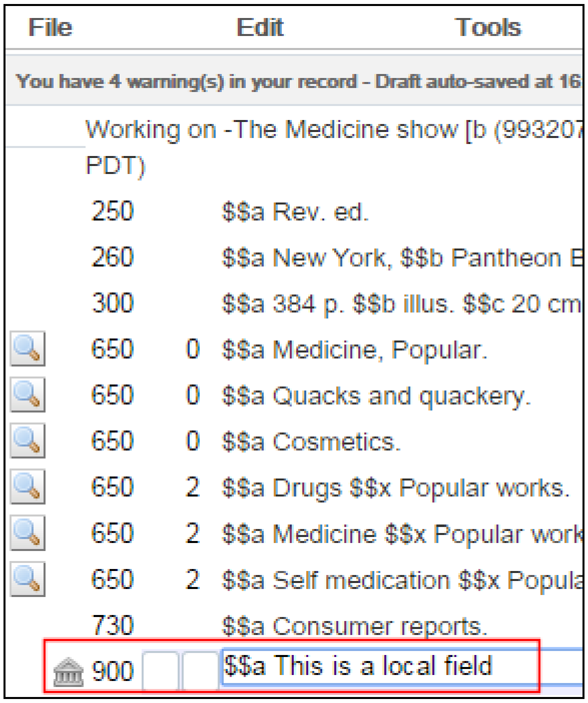


Figure 15 - Adding/Editing a Local Field from a Network Zone Member Institution

2 Select a new cataloging level for the record from the drop-down list.

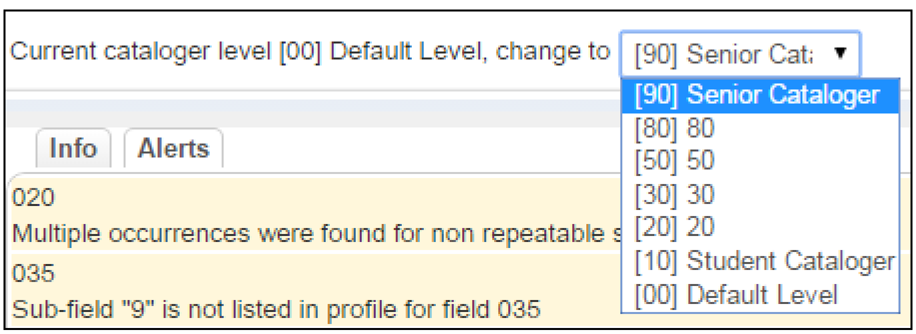


Figure 16 - Cataloging Level Drop-Down List

3 Click **Save**. The current cataloging level of the record is updated to reflect your change.

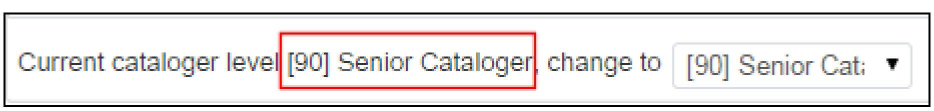


Figure 17 - Cataloging Level Changed

To search for records based on a cataloging level:

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

2 Click **Advanced Search**.

3 Click **Add Conditions**.

4 Select **Cataloger Level** from the list of conditions.

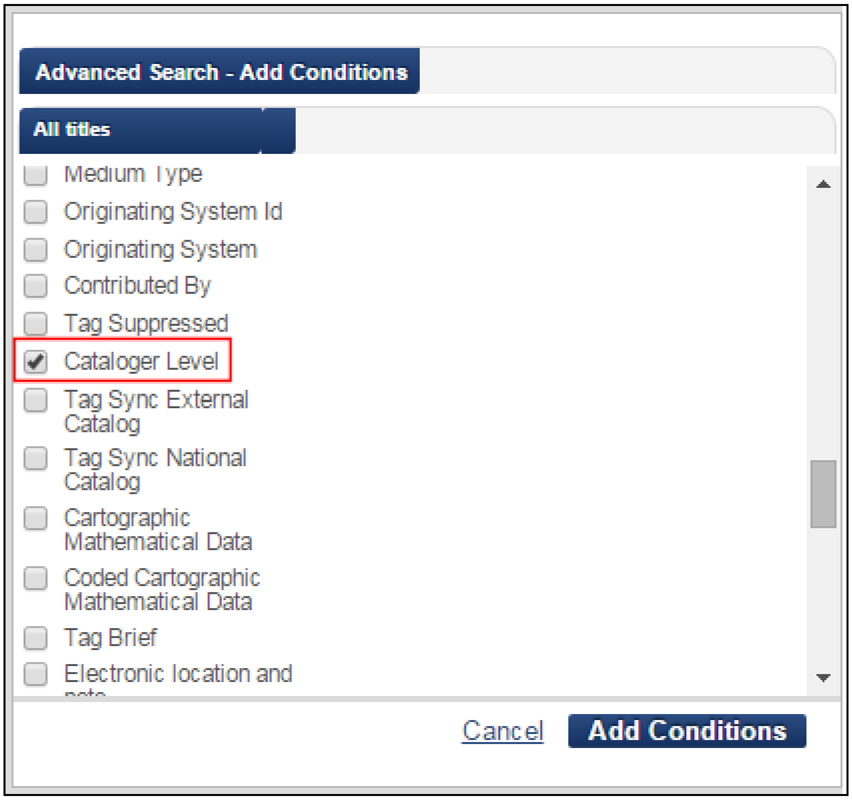


Figure 18 - Cataloging Level Advanced Search

5 Click **Add Conditions**.

6 Select your cataloging level criteria.

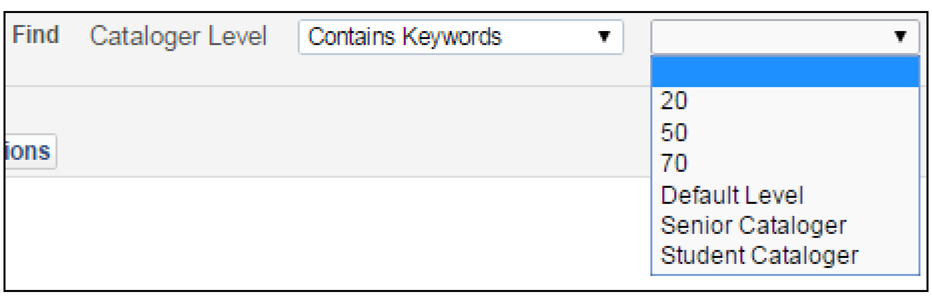


Figure 19 - Cataloging Level Search Criteria

7 Click **Go**. The search results display a list of records that have a cataloging level assignment matching the criteria that you selected.

To assign a cataloging level to a set of records:

1. Open the **Run a Job – Select Job to Run** page (**Administration > Manage Jobs > Run a Job**).
2. Select one of the following:
   - Set Bib Records Cataloging Level
   - Set Authority Records Cataloging Level
3. Click **Next**.
4. Select the set that you created for assigning a cataloging level and click **Next**.
5. Select the cataloging level to be assigned to the selected set of records.

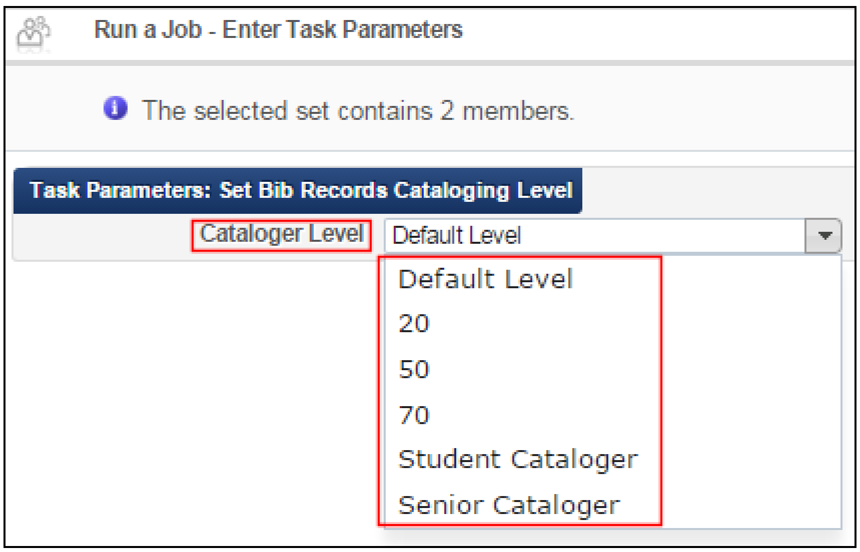


Figure 20 - Select Cataloging Level to Assign to the Set of Records

6. Click **Next**.
7. Review the general information and scheduling information and click **Next**.
8. Review all your job information on the **Run a Job – Review and Confirm** page and click **Submit**.

New Resource Type Field

A new field called **Resource Type** has been added to Alma. The Resource Type is constructed based on existing bibliographic fields such as the LDR and 008. This new field supplements (but does not replace) the existing Material Type field. The new Resource Type is searchable, available as a facet, and is extracted to Analytics. The new Resource Type field is much more detailed than the existing Material Type field. As a result, it will be a useful means of constructing detailed reports. For details regarding the new Resource Type fields and the criteria for their creation, refer to the notes and table in the section below.

Note: The new field will be applied to existing records following the re-indexing process in July.

After a record is saved or indexed, the new Resource Type field information appears in the search results.

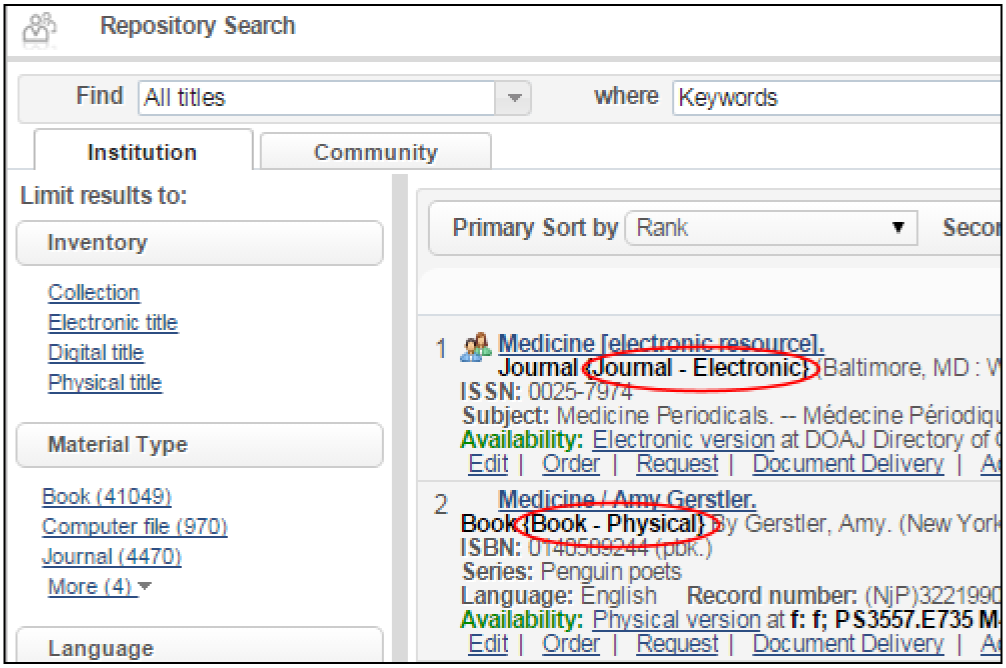


Figure 21 - Resource Type Field

It is also available as a facet.

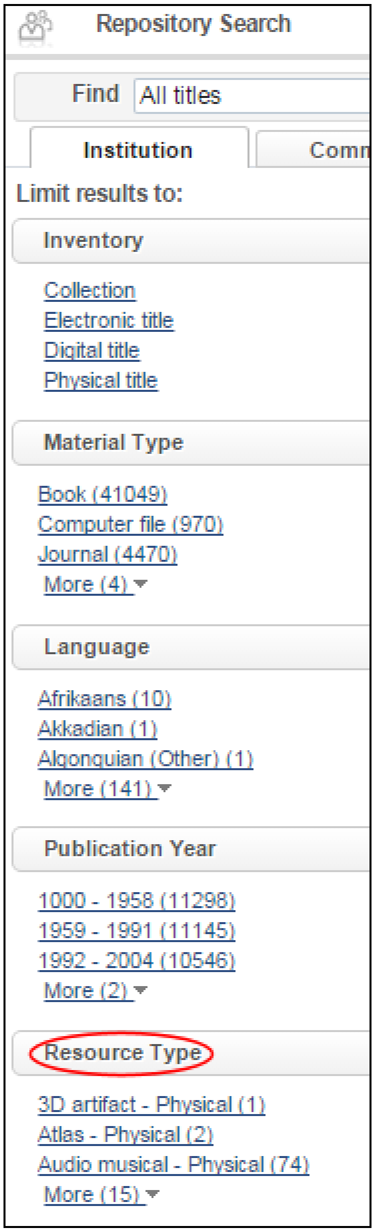


Figure 22 - Resource Type as a Facet

Resource Type is also available in Advanced Search.

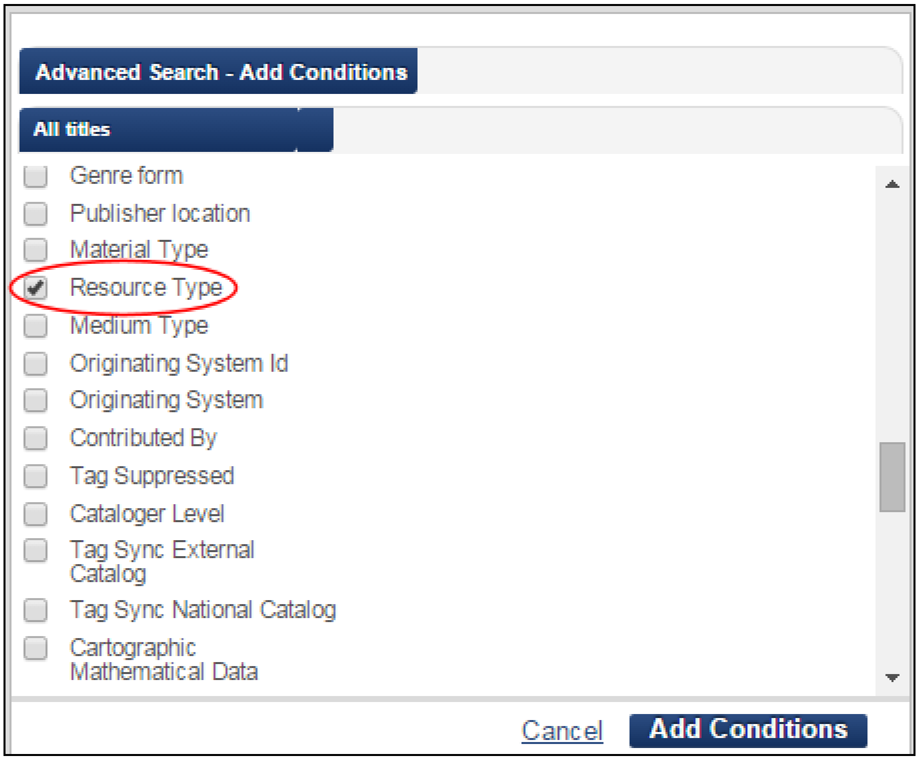


Figure 23 - Resource Type in Advanced Search

Rules for Creation of the Field Resource Type

- != means not equal

  For example, "008 pos. 06 != d" means 008 position 6 will be anything except d

- , (comma) means or

  For example, "008 pos. 23 != a,b,c,o,f " means 008 position 23 does not equal a or b or c or o or f

- Physical = printed books, printed serials, music-CD's, CD-roms, DVD's, and so forth (except microforms)
- Electronic = online (ebooks, e-serials, and so forth)

Resource Type	Rule
Book - Physical	LDR pos. 06 = a AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Book - Electronic	LDR pos. 06 = a AND LDR pos. 7 = m AND 008 pos. 23 = o
Braille Book – Physical	LDR pos. 06 = a AND LDR pos. 7 = m AND 008 pos. 23 = f

Resource Type	Rule
Braille Serial – Physical	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 23 = f
Braille Map – Physical	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 = f
Braille Music – Physical	LDR pos. 06 = c AND LDR pos. 7 = m AND 008 pos. 23 = f
Atlas - Physical	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 != a,b,c,o AND 008 pos. 25 = e
Atlas - Electronic	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 = o AND 008 pos. 25 = e
Map - Physical	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 != a,b,c,o AND 008 pos. 25 != e
Map - Electronic	LDR pos. 06 = e AND LDR pos. 7 = m AND 008 pos. 29 = o AND 008 pos. 25 != e
Newspaper - Physical	LDR pos. 06 = a,e AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = n AND 008 pos. 23 != a,b,c,o,f
Newspaper - Electronic	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = n AND 008 pos. 23 = o
Journal - Physical	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = p AND 008 pos. 23 != a,b,c,o,f
Journal - Electronic	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 = p AND 008 pos. 23 = o
Other Serial - Physical	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 != n,p AND 008 pos. 23 != a,b,c,o,f
Other Serial - Electronic	LDR pos. 06 = a AND LDR pos. 7 = i,s AND 008 pos. 06 != d AND 008 pos. 21 != n,p AND 008 pos. 23 = o
Manuscripts – Physical [1]	LDR pos. 06 = d,t AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Manuscripts – Physical [2]	LDR pos. 06 = f AND LDR pos. 7 = m AND 008 pos. 29 != a,b,c,o,f

[1] music and text manuscripts
[2] cartographical manuscripts

Resource Type	Rule
Manuscripts – Electronic [3]	LDR pos. 06 = d,t AND LDR pos. 7 = m AND 008 pos. 23 = o
Manuscripts – Electronic [4]	LDR pos. 06 = f AND LDR pos. 7 = m AND 008 pos. 29 = o
Notated music- Physical	LDR pos. 06 = c AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Notated music - Electronic	LDR pos. 06 = c AND LDR pos. 7 = m AND 008 pos. 23 = o
Audio musical - Physical	LDR pos. 06 = j AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Audio musical - Electronic	LDR pos. 06 = j AND LDR pos. 7 = m AND 008 pos. 23 = o
Audio nonmusical – Physical	LDR pos. 06 = i AND LDR pos. 7 = m AND 008 pos. 23 != a,b,c,o,f
Audio nonmusical - Electronic	LDR pos. 06 = i AND LDR pos. 7 = m AND 008 pos. 23 = o
Projected medium - Physical	LDR pos. 06 = g AND LDR pos. 7 = m AND 008 pos. 33 = d,f,m,p,s,t,v AND 008 pos. 29 != a,b,c,o,f
Projected medium - Electronic	LDR pos. 06 = g AND LDR pos. 7 = m AND 008 pos. 33 = d,f,m,p,s,t,v AND 008 pos. 29 = o
2D non-projectable graphic - Physical	LDR pos. 06 = k AND LDR pos. 7 = m AND 008 pos. 33 = a,c,i,k,l,n,o AND 008 pos. 29 != a,b,c,o,f
2D non-projectable graphic - Electronic	LDR pos. 06 = k AND LDR pos. 7 = m AND 008 pos. 33 = a,c,i,k,l,n,o AND 008 pos. 29 = o
Kit - Physical	LDR pos. 06 = o AND 008 pos. 33 = b AND 008 pos. 29 != a,b,c,o,f
3D artifact - Physical	LDR pos. 06 = r AND 008 pos. 33 = r,w AND 008 pos. 29 != o
Microforms	008 pos. 23 = a,b,c
Other material - Electronic	LDR pos. 06 = m
Undefined	Everything that is not in the defined categories. This category could work as a checklist to find mistakes in the control fields as well.

[3] music and text manuscripts
[4] cartographical manuscripts

Contributing Electronic Collections of the Database Type to the Community Zone

Description

With the July release, local electronic collections that represent databases can be contributed to the Community Zone for the wider use of the community. Electronic collections representing databases have no services or portfolios. The contributed content includes a bibliographic record that describes the electronic collection and the URL that is native to the database.

This type of contribution to the Community Zone will be processed in a manner similar to other materials contributed to the Community Zone. It will be flagged with a status of **Under Review**, and Ex Libris staff will check for the contribution to meet the following minimal criteria:

- The electronic collection is not already a part of the Community Zone
- Satisfactory linking verification

Once the contribution has passed this check by Ex Libris, the contributor will be notified and the collection will be available for the wider community to use. Refer to the document *Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities* available at the following link and the **Community Zone Contribution Guidelines** section in the online help or the *Alma Resource Management Guide* for additional details:

http://www.exlibrisgroup.com/files/Products/Alma/AlmaCommunityCatalogCatalogingStandardsPolicies.pdf

When community members activate an electronic collection of type database, the result is an electronic collection (including its bibliographic record) at the Institution Zone level which is linked to the Community Zone electronic collection.

Step-by-Step Instructions

The following role can work with contributing database electronic collections:

- Electronic Inventory Operator

To create and contribute database electronic collections:

1. Open the Electronic Collection Editor (**Resource Management > Create Inventory > Add Local Electronic Collection**).
2. Enter the name and description information, and select the **Database** option from the **Collection type** drop-down list.

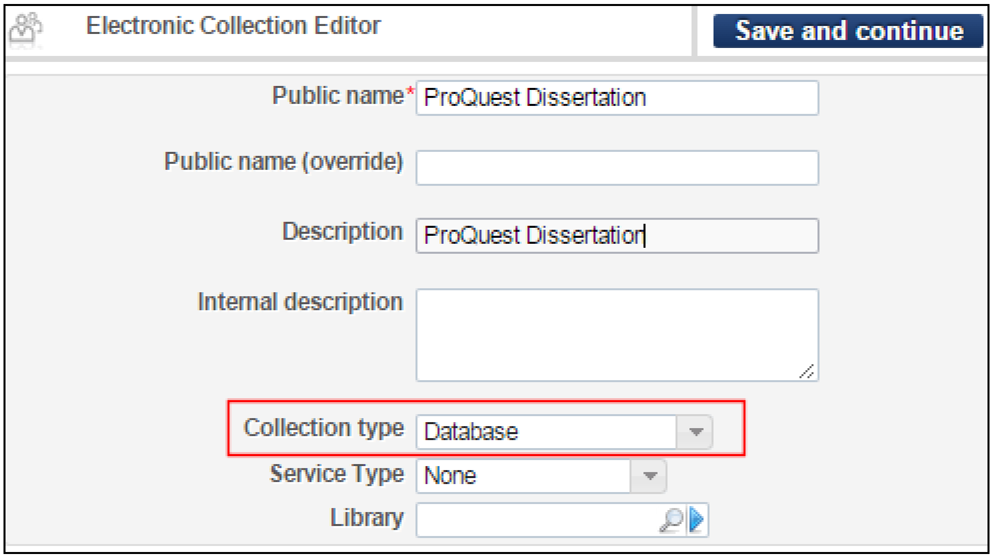


Figure 24 - Creating a Database Type of Electronic Collection

3 Click **Save and Continue**. The **General Information** tab of the Electronic Collection Editor appears.

4 Select the **Additional Information** tab.

5 Minimally, enter the **Electronic Collection Level URL** and the **Additional description information** (bibliographic record information). These two pieces of information are required for contributing the database electronic collection to the Community Zone.

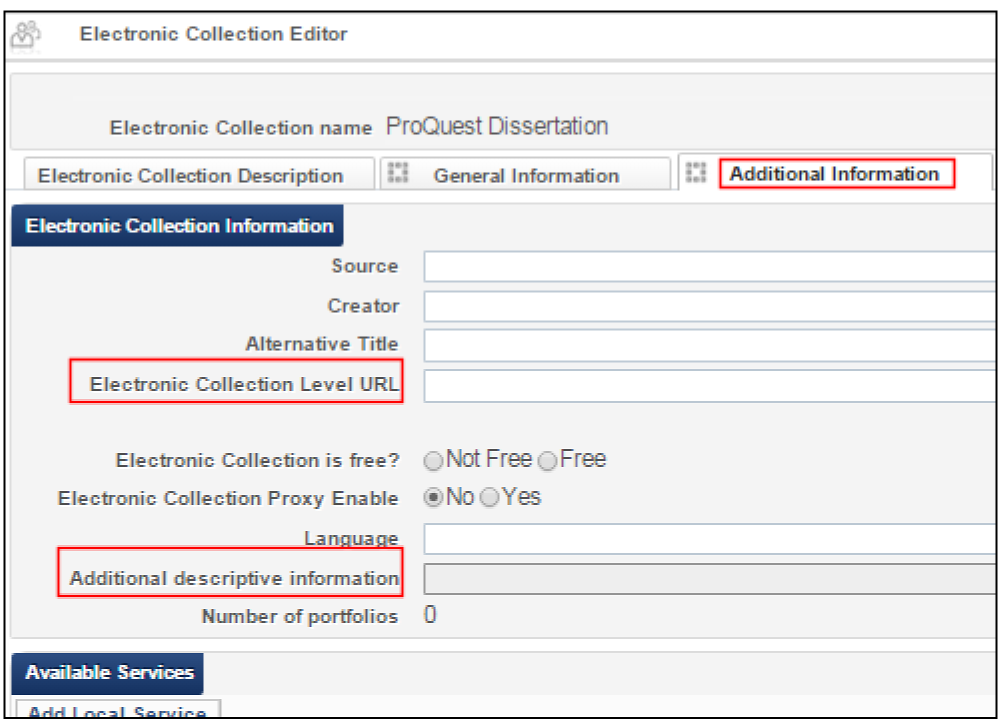


Figure 25 - Additional Information Tab

6 Click **Save**. You need to save the database electronic collection entry before you can contribute it to the Community Zone. If you attempt to contribute to the Community Zone before saving the collection entry, the system will display the following message.

Figure 26 - Save Before Contributing

The database electronic collection that you saved appears on the Repository Search page.

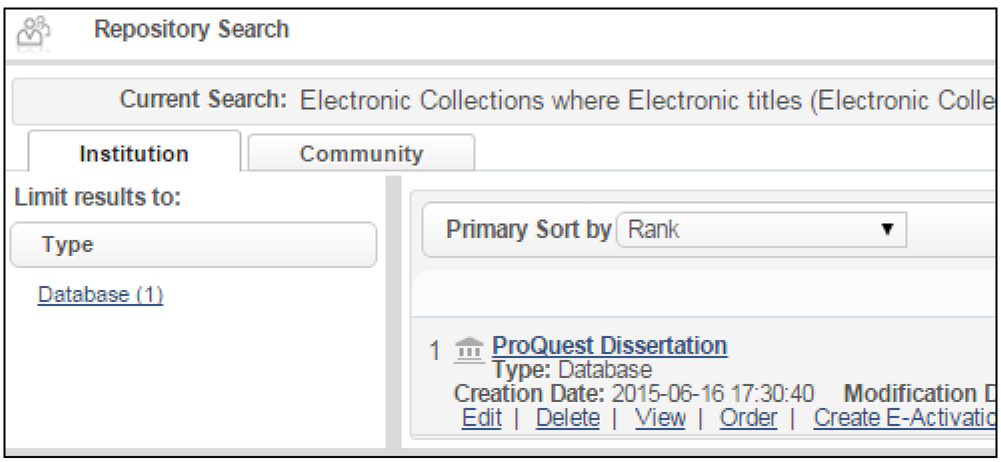


Figure 27 - Saved Database Electronic Collection Appears on the Repository Search Page

7 Click **Edit**.

8 Click **Contribute and Continue**.

Figure 28 - Contribute to Community Button

The **Contribute to Community** confirmation message appears.

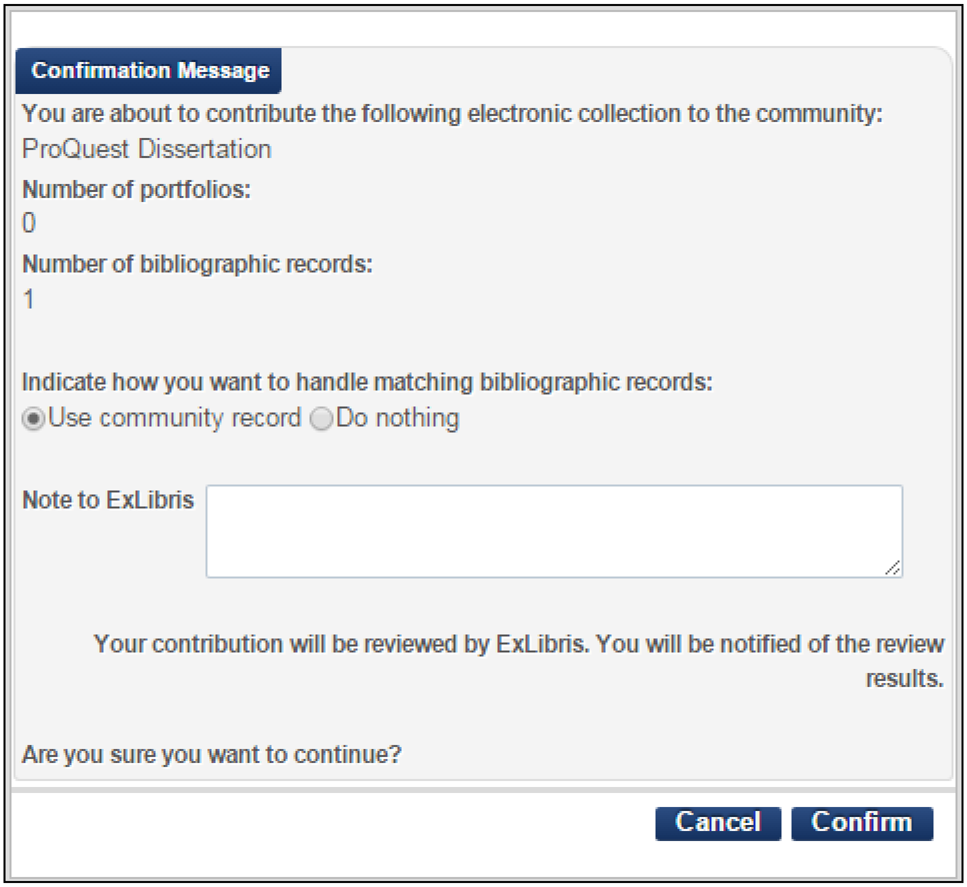


Figure 29 - Contribute to the Community Confirmation Message

9 In the case where Alma finds a match in the Community Zone for the contributed bibliographic record, you can choose to use the Community Zone record and replace your existing bibliographic record or do nothing, in which case, the bibliographic record for the electronic collection will be the Community Zone-matched bibliographic record and your own local bibliographic record will remain.

10 Click **Confirm**. The system displays a successful contribution message and flags your contribution for review by Ex Libris.

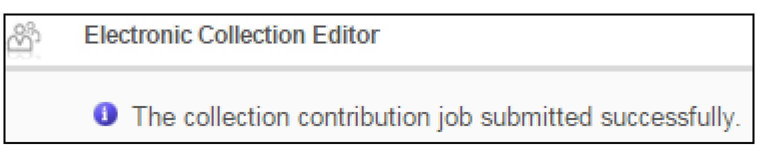


Figure 30 - Successful Contribution Message

Subsequently, anyone searching the Community tab for your collection will see the **Under Review** status until Ex Libris has completed the review and removed this status label.

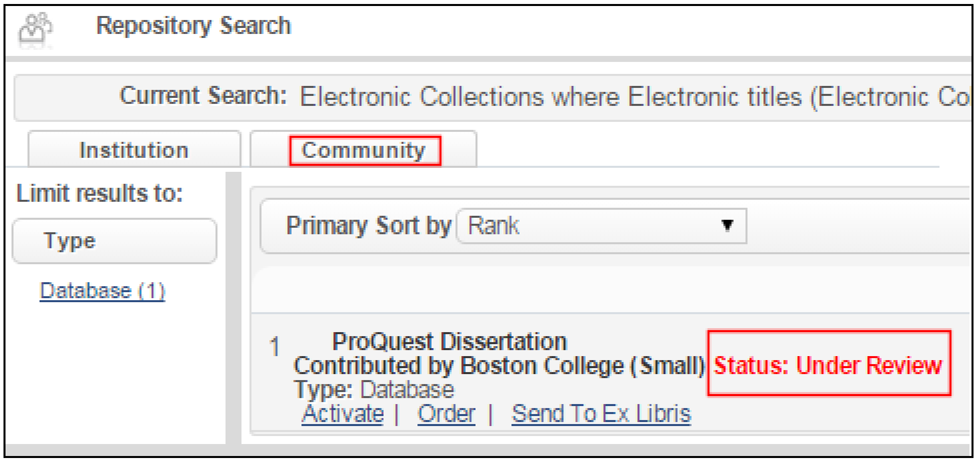


Figure 31 - Status of Under Review

When other community members activate your database electronic collection (by clicking the **Activate** link in the Community tab search results), the Activation Wizard displays the **Electronic Collection Level URL** and **Additional descriptive information** that you were required to enter in order to contribute your database electronic collection. Also, the same parameters are provided in the **Local Electronic Collection Information** section of the wizard in order to give the Community members the option to override the parameters provided in the Community Zone.

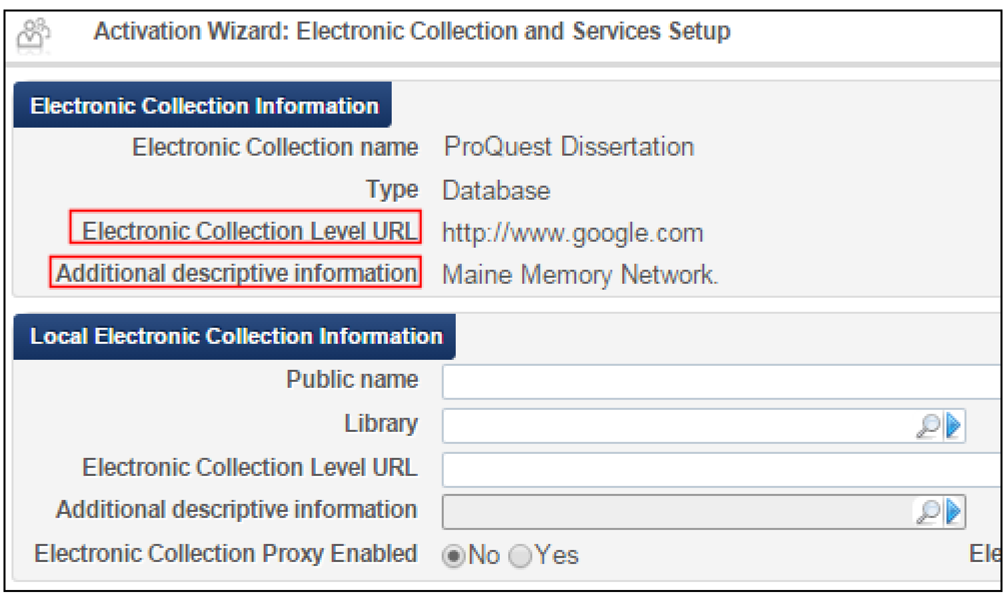


Figure 32 - Activation Wizard for a Database Electronic Collection

Importing KORMARC Records with External Search

Description

With the July release, Alma provides support for importing records from KERIS (Korea Education and Research Information Service), a service that contains bibliographic records in both KORMARC and MARC 21 formats. The External Search Resources and External Search Profile capabilities in Alma have been expanded to support importing KERIS records. With this new capability, staff are able to do copy cataloging from KERIS and thereby improve their productivity when creating new records in Alma.

Step-by-Step Instructions

The following roles can search external resources in the MD Editor:

- Cataloger
- Catalog Manager
- Catalog Administrator

The following roles can configure search external resources for KERIS:

- Cataloger Administrator
- General System Administrator

Note: To work with KORMARC records in Alma, your Active Registry needs to have the KORMARC bibliographic registry activated by Ex Libris.

To configure External Search Resources for working with KORMARC records in KERIS:

1 Click **External Search Resources** from the **Search Configuration** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**). The Search External Resource Setup page appears.

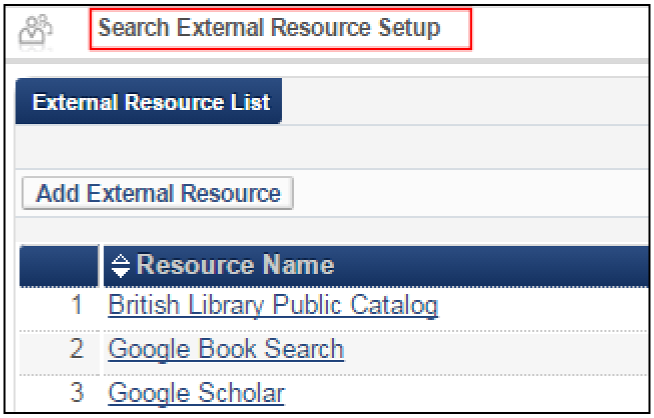


Figure 33 - Search External Resource Setup Page

2 Click **Add External Resource**. The Find Resources section appears.

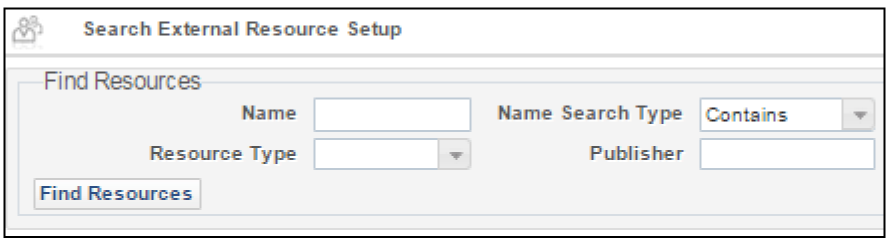


Figure 34 - Find Resources

3 In the **Name** parameter, enter KERIS and click **Find Resources**. The system finds the following resources:

- KERIS (Korea Education and Research Information Service) – MARC 21 record format
- KERIS (KORMARC) – KORMARC record format

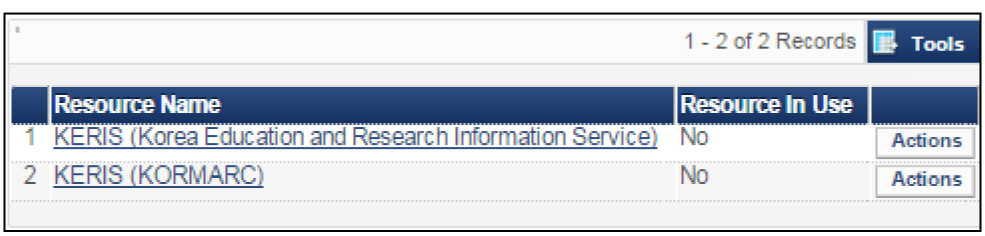


Figure 35 - Find Resources Results

4 Select **Actions > Select Resource** to configure the external resource for Alma. The External Resource Details and Institution Details sections appear.

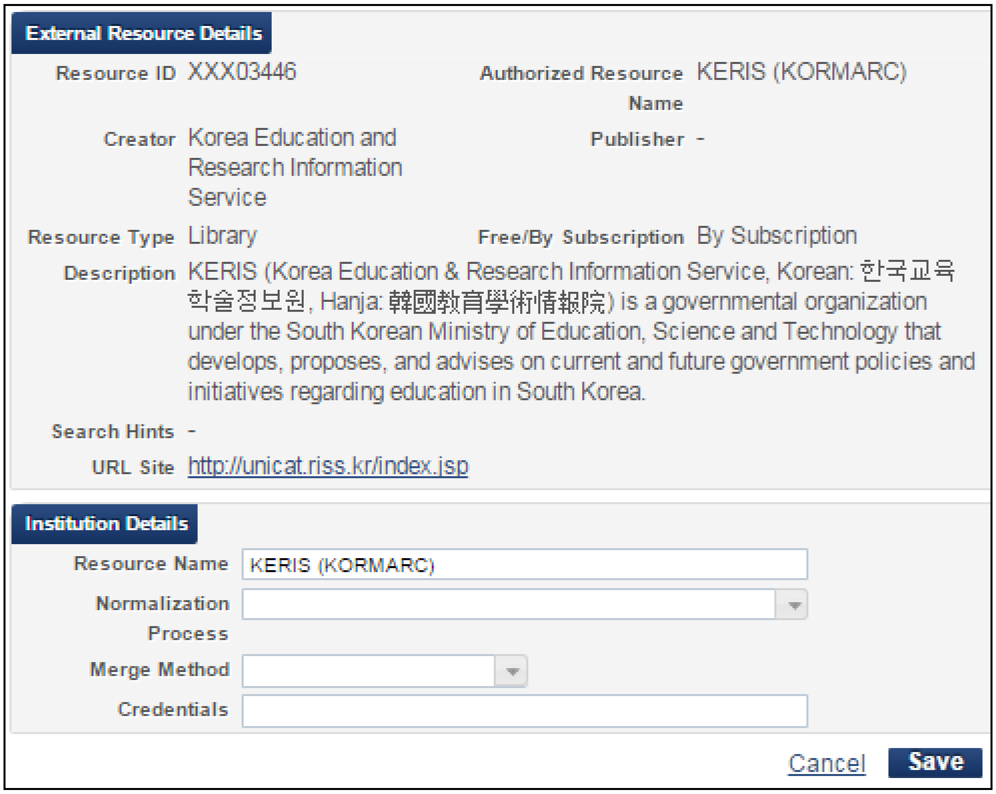


Figure 36 - External Resource Details and Institution Details

5 Select the **Normalization Process** and **Merge Method** that you prefer to use when importing KORMARC records, enter your **Credentials** for accessing KERIS, and click **Save**. The **Resource in Use** column displays **Yes** for the KERIS (KORMARC) setup that you saved.

6 If you want to import KERIS records that are stored in the MARC 21 record format, repeat these configuration steps for the **KERIS (Korea Education and Research Information Service)** resource in the Find Resources results list.

7 Click **Back** and observe that the KERIS resources have been added to the External Resource List.

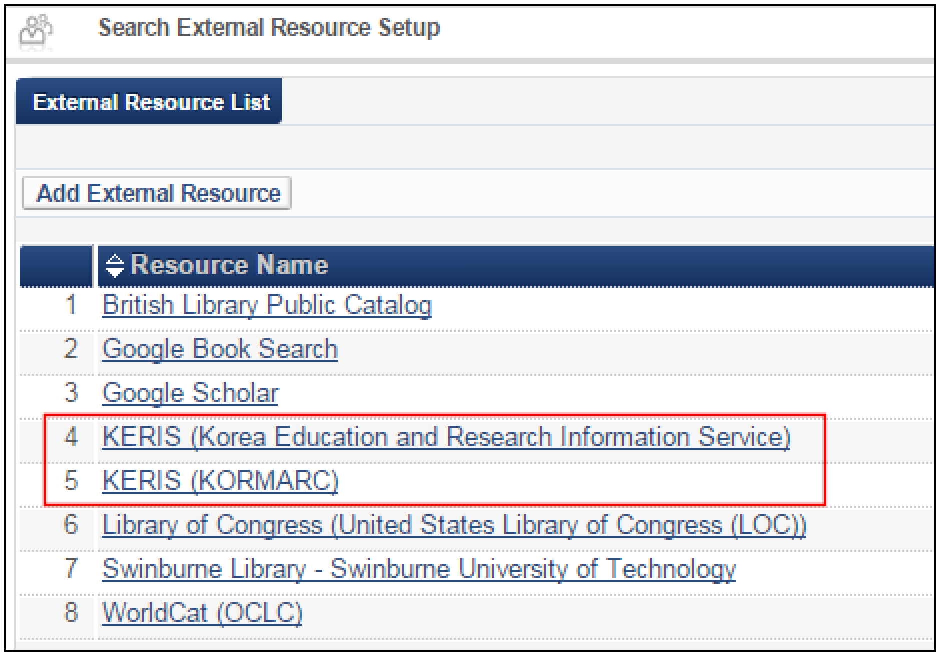


Figure 37 - KERIS Resources Added to the External Resource List

To configure KERIS external search profiles for the MD Editor:

1 Click **External Search Profile** from the **Search Configuration** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**). The External Search Profile List page appears.

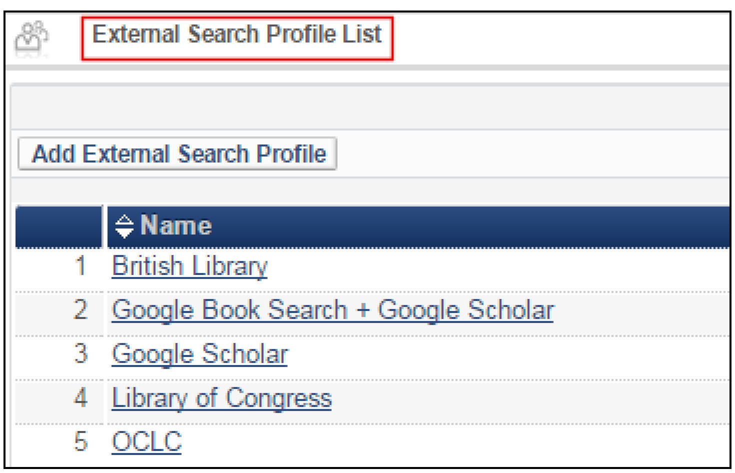


Figure 38 - External Search Profile List Page

2 Click **Add External Search Profile**. The **General Information** section of the **External Search Profile Details** appears.

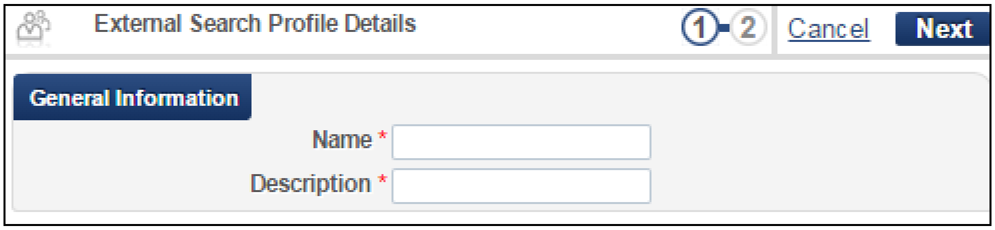


Figure 39 - External Search Profile Details - Step 1

3 Enter the **Name** and **Description** for your KERIS (KORMARC) profile and click **Next**. The page with your available External Resource Pool appears.

Figure 40 - External Resources Pool

4 Select the **KERIS (KORMARC)** resource from the pool and click **Add to Selection**.

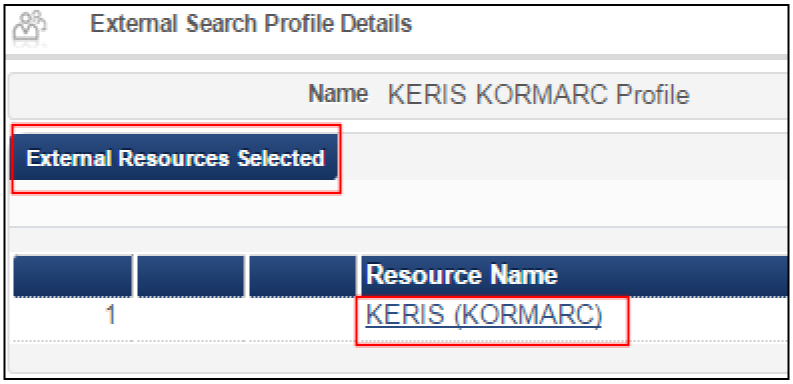


Figure 41 - External Resources Selected Section

5 Click **Save**. Your KERIS KORMARC profile is added to the External Search Profile List.

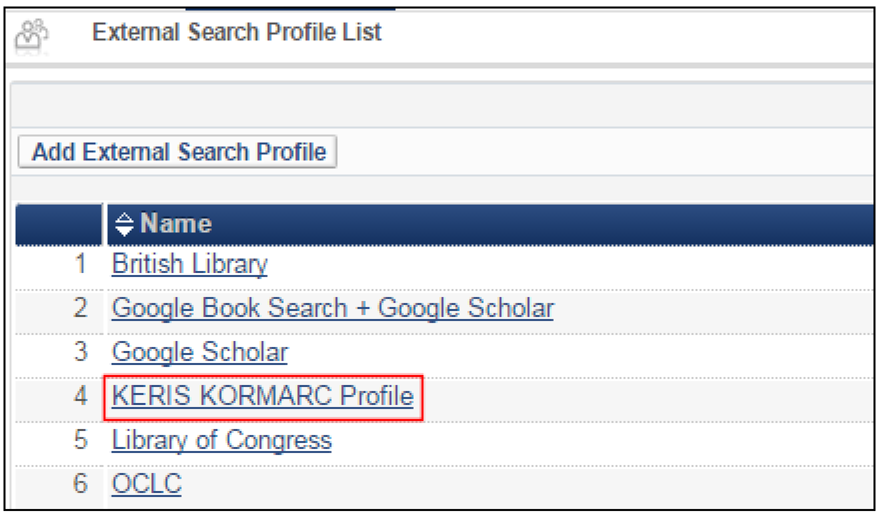


Figure 42 - KERIS KORMARC Profile Added to the List

6 If you want to have a profile for the **KERIS (Korea Education and Research Information Service)** resource, repeat these steps and select the **KERIS (Korea Education and Research Information Service)** resource from the External Resources Pool section. Optionally, you may choose to create a profile where you have both the KERIS (KORMARC) and **KERIS (Korea Education and Research Information Service)** resources selected from the External Resources Pool section.

To import KORMARC records using the MD Editor Search External Resource option:

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

2 Select **Tools > Search External Resources**.

3 For the **Search Cataloging Profile** option, select the KERIS profile that you created.

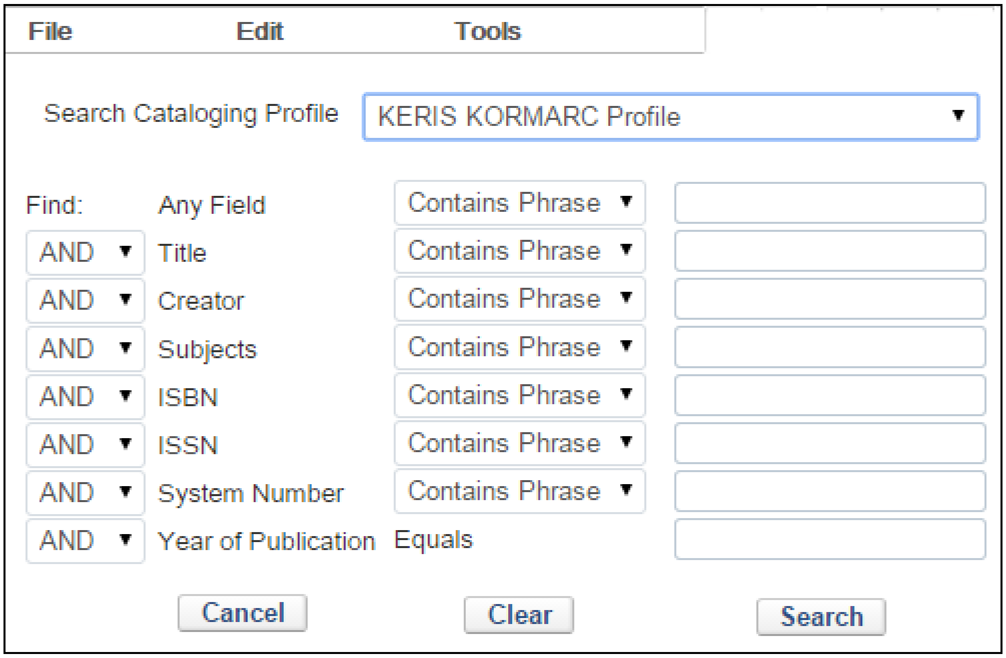


Figure 43 - Search Cataloging Profile Selected

4 Enter your search criteria and click **Search**. The KERIS search results appear.

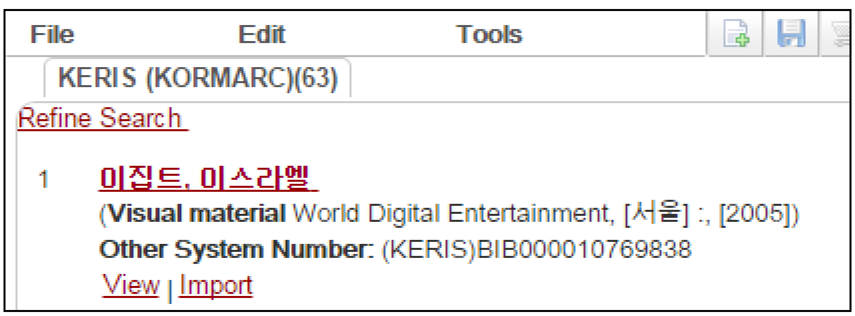


Figure 44 - KERIS Search Results

5 Click **Import** for the record that you want. The record appears in the MD Editor editing section and is stored in the **KORMARC Bibliographic** folder that appears in the left pane of the MD Editor.

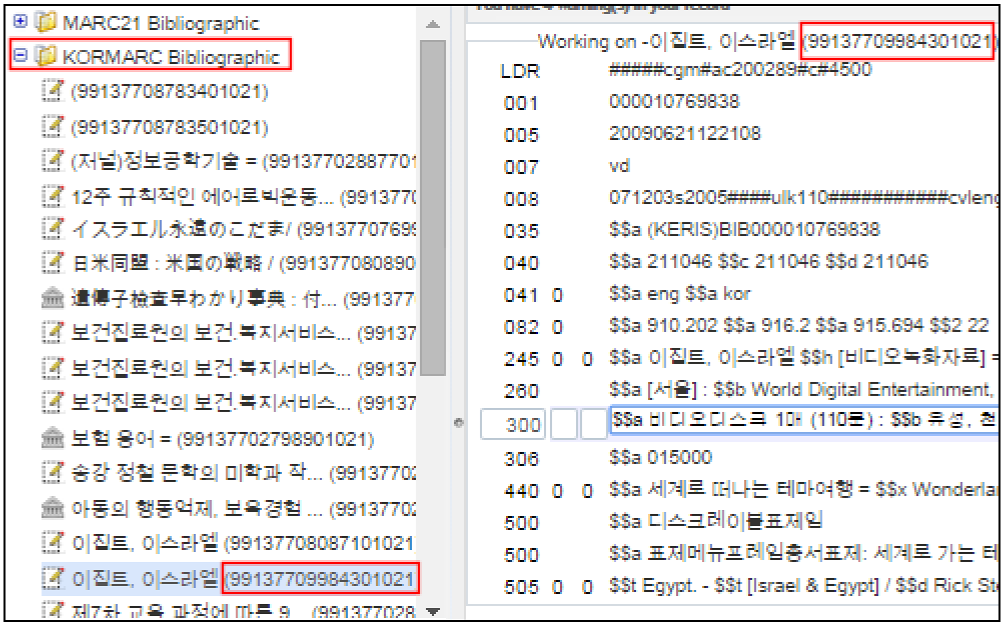


Figure 45 - KORMARC Record Imported from KERIS

When you import KERIS records using the KERIS (Korea Education and Research Information Service) profile, the records are stored in the MARC21 Bibliographic folder, since using the KERIS (Korea Education and Research Information Service) profile indicates to Alma that you are importing a record in the MARC 21 record format.

6 Complete working with this record as you normally would in the MD Editor and click **Save** when you are finished.

Digital Inventory and Collection Enrichment for Publishing Profiles

Description

It is now possible to enrich publishing profiles for digital inventory for the purpose of integrating with third-party systems. This enhancement now completes the inventory enrichment of Alma's Publishing platform, so that an institution can publish its inventory incrementally and on an ongoing basis.

Step-by-Step Instructions

The following roles can create a publishing profile:

- Catalog Administrator
- Repository Administrator

- General System Administrator

To enrich publishing profiles for digital inventory:

1. On the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**), click **Add Profile** > **General Profile**. The first page of the Publishing Profile Details wizard appears.
2. Fill in the fields as described in the **Publishing and Inventory Enrichment** section of the *Alma Integrations with External Systems* guide or the Alma online help.
3. Click **Next**. The second page the Publishing Profile Details wizard appears with the new **Digital Inventory Enrichment** and **Collection Enrichment** sections.

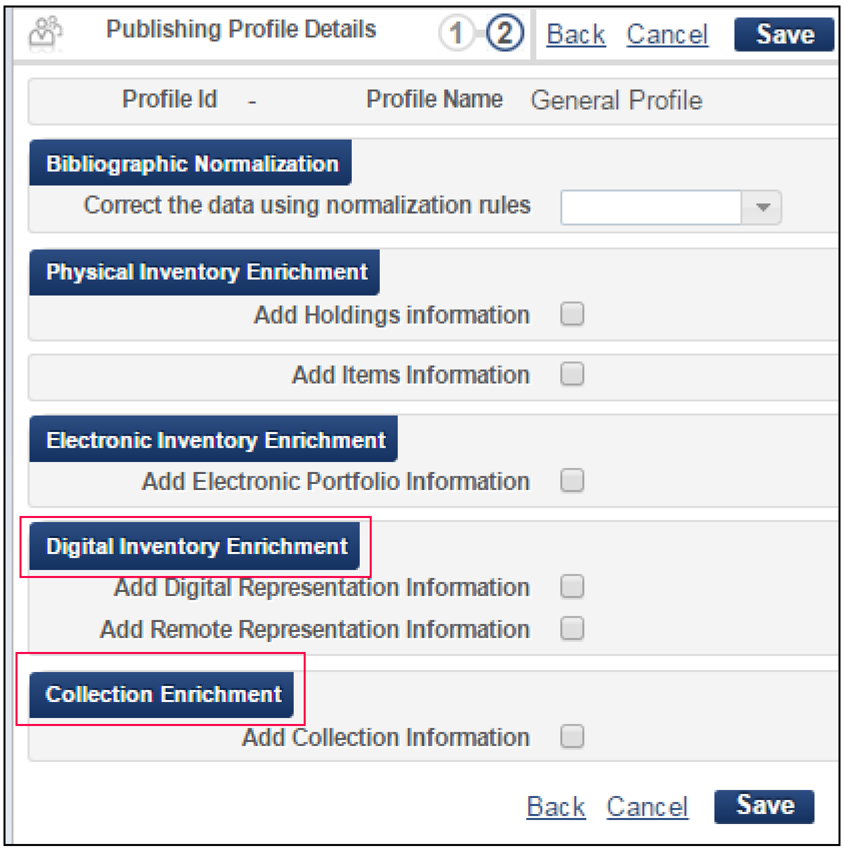


Figure 46 – Publishing Profile Details

4. Select the following options to add digital, remote, and collection information:
   - Add Digital Representation Information
   - Add Remote Representation Information
   - Add Collection Information

   The repeatable fields and subfields that will hold the digital and collection information appear:

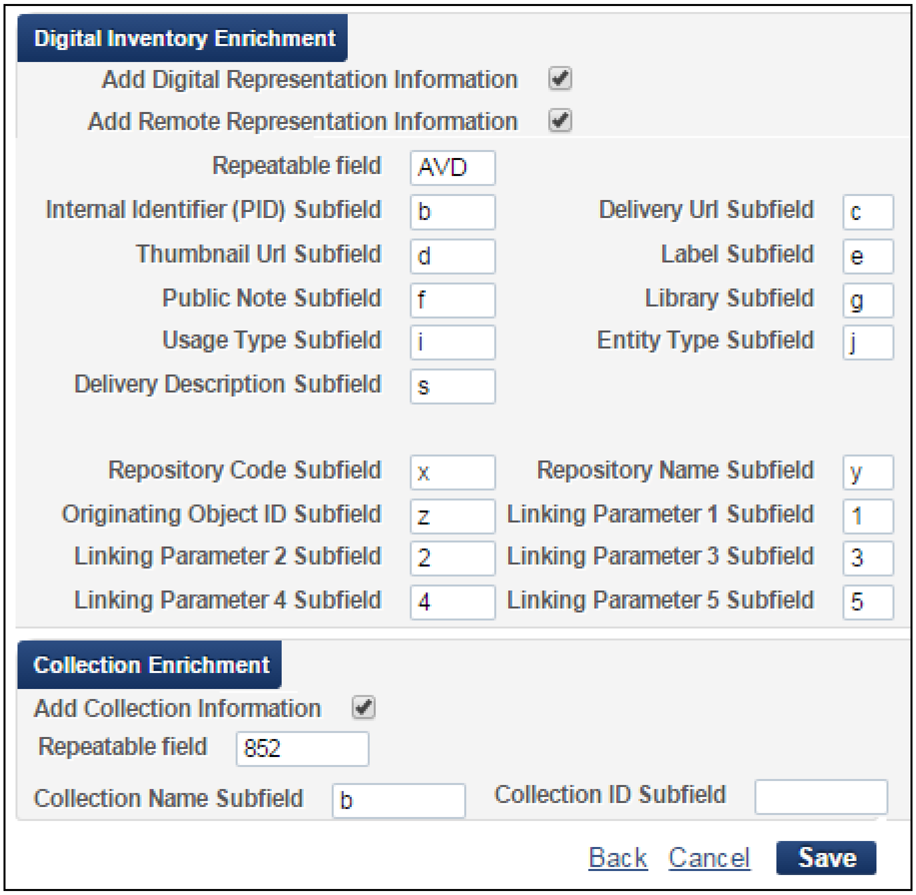


Figure 47 – Digital Inventory and Collection Enrichment Fields

5 Indicate the subfields to contain the information, or retain the defaults.

6 Click **Save**.

The publishing profile has been enriched with the digital inventory and collection information.

Publishing OAI-DC in OAI-PMH

Description

Alma publishing platform now supports OAI-DC, which can be useful when integrating Alma with third-party systems.

Step-by-Step Instructions

The following roles can create a publishing profile:

- Catalog Administrator
- Repository Administrator

- General System Administrator

To publish in OAI-DC:

1 On the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**), click **Add Profile** > **General Profile**. The first page of the Publishing Profile Details wizard appears.

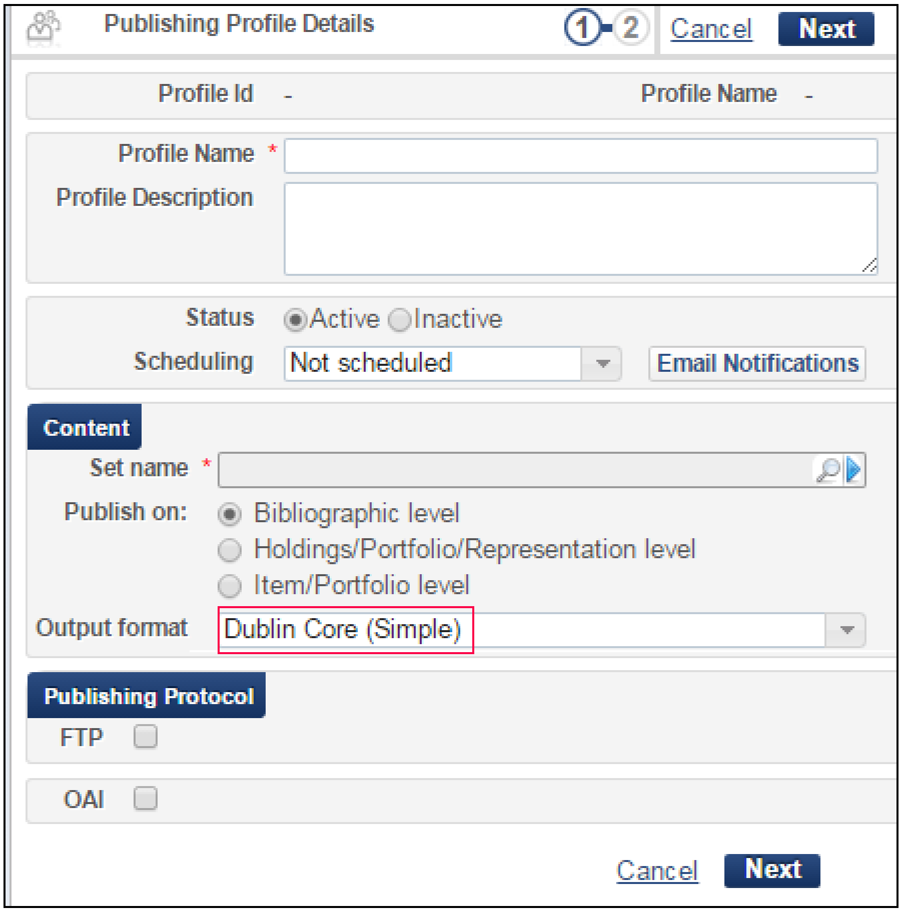


Figure 48 –Publishing in OAI-DC

2 In the **Output format** field, select **Dublin Core (Simple)**.

3 Fill in the rest of the fields as described in the **Publishing and Inventory Enrichment** section of the *Alma Integrations with External Systems* guide or the Alma online help.

4 Click **Next**. The second page of the wizard appears.

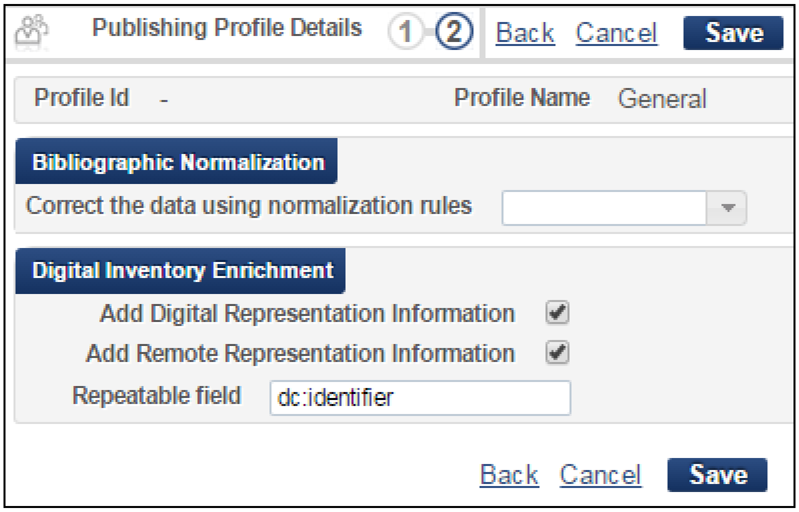


Figure 49 – Digital Inventory Enrichment

Add Digital Representation Information and Add Remote Representation Information are both selected and the Repeatable field is set to dc:identifier, by default.

5 Click **Save** to save the publishing profile.

Note: Print and electronic resources do not have any enrichment available in OAI-DC format.

Mapping Digital Resources to Collections During Import

You can now add an imported bibliographic record of a digital item to an existing collection based on metadata content. This enhancement will allow an improved, dynamic mapping of a resource to a collection as part of the ongoing metadata import processes. This eliminates the need to perform any retrospective, post load collection assignment of materials loaded.

If the **dcterms:isPartOf** fields of the imported DC records contain the name of an existing top-level collection in the MARC 852b field, the imported records are assigned to that collection. If no collections are found, the imported records are assigned to a default collection.

The default collection is defined in the fifth step of the Import Profile Details Wizard (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Add New Profile**):

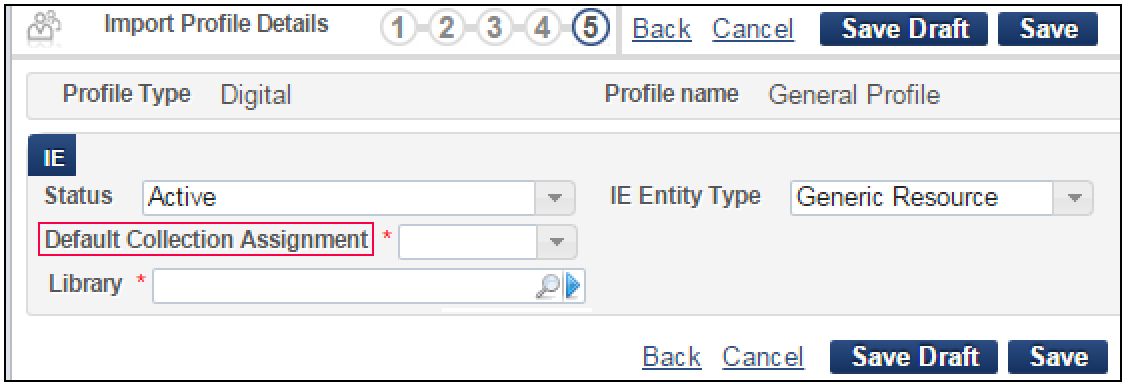


Figure 50 – Default Collection Assignment

Enhanced Sorting for Scandinavian Languages and German

The sorting of results in Scandinavian languages and German has been enhanced to follow the conventions of those languages for special characters.

The following is an example of the enhanced sorting functionality for Swedish characters:

Figure 51 – Sorting for Swedish Characters

Note: To have this enhancement implemented for your institution, contact Ex Libris Support.

New MARC 21 Indexes

- With the July release, the following new MARC 21 indexes are available in Alma's advanced repository search:
  - Bibliographic
    - 655 x-z (added to the Genre Form index)
    - 034 b, d, e, f, g, j, k, m, n, p, r, s, t, x, y, z (Coded Cartographic Mathematical Data new index)
    - 255 a, b, c, d, e, f, g (Cartographic Mathematical Data new index)
    - 542 r and j (added to the Search – Copy Rights Notes 542 index)
    - 008/021 (Granular Resource Type new index)
  - Holdings
    - 008 - Fixed-Length Data Elements-General Information (NR)

      Example Use Case: Find all records that are in a given location that have a lending policy (position 20) of `will lend` and a reproduction policy (position 21) of `will reproduce`.
- With the July release, the following fields have been indexed in the Keyword search:
  - 505 a, g, r, t and 520 a, b – indexed as Description
  - 773 x, z – indexed as Standard Number

  Re-indexing to incorporate these new indexes will begin after the July release has been made available.

- With the July release, a new import profile for LIBRIS is being provided in the Community Zone. The new template is called **Import repository from Libris** and can be accessed by clicking **Import Profiles** from the **Record Import** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) and selecting the **Community** tab.

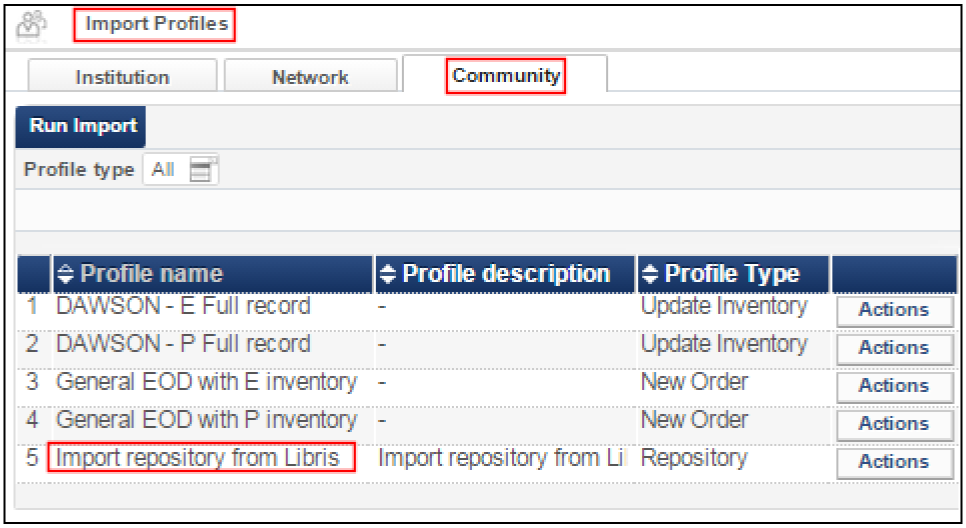


Figure 52 - New LIBRIS Import Profile Template in the Community Tab

Other Resource Management Enhancements

- In the electronic Activation Wizard, the field Authentication note was changed to **Service authentication note** and the field Public note was changed to **Service public note**.
- The Alma link resolver now uses genre to help prioritize identifiers.
- The sort options available in an **All titles** repository search are now available for **Physical titles**, **Electronic titles**, and **Digital titles** searches in the Institution tab.
- The display of the repository search's title was extended and it now contains values from the following 245 subfields: a,b,n,p,c,f,g,h,k,s. Note that this will take effect after the July re-indexing process has completed.
- When publishing bibliographic records to OCLC, the maximum number of records per file that can now be published is 90K. This complies with OCLC standards (http://www.oclc.org/content/dam/support/batchload/documentation/using/FTPinstructions.pdf).

Fulfillment

The following are enhancements for the Fulfillment functional area in the July 2015 release of Alma**:**

- Confirmation dialog boxes were added to the following pages:
  - Waiving fines in bulk (**Administration > User Management > Bulk Fine Waiving**)
  - Changing loan due dates in bulk (**Fulfillment > Advanced Tools > Bulk Change Due Dates**)
  - Executing transfer requests (**Fulfillment > Advanced Tools > Transfer Requests**)
- The **Fines and Fees** report now includes the column **Operator Name**, which is the name of the circulation desk operator that received the payment.
- It is now possible to disable the ability to view loan details in all places where this information is accessible:
  - Repository search for physical items
  - List of Items
  - Physical Item Editor

  If you want to disable the viewing of loan details for any existing Alma role, contact Ex Libris Support.
- In the **Requests** tab in Manage Patron Services, it is now possible to sort by the **Resource Sharing** column (as well as by creation date).
- The button **Apply Rules** in Request Pickup Configuration (**Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Request Pickup Configuration**) was changed to **Calculate Existing Requests Retroactively**.
- It is now possible to set the scheduling for the Loans - Change to Lost job in Fulfillment Jobs Configuration (**Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**).
- The **Do not pick from shelf** option was added as one of the parameters that can be selected for the Create Work Order for Physical Items job (**Manage Jobs > Run a Job > Create Physical Item Work Orders**).
- Alma Link Resolver requests are now enriched with the following data: publisher, publication date, place of publication. The fields are placed in the following attributes:
  - {rft.publisher} – publisher
  - {rft.pubdate} – publication date
  - {rft.place} – place of publication

These attributes can be used in the General Electronic Services configuration.

- The following information was added to the loan information on the Loan Audit Trail page (accessed from Manage Patron Services):
  - Loan status
  - Process ID
- The Active Hold Shelf list (**Fulfillment > Resource Requests > Active Hold Shelf**) now contains a **Place in Queue** attribute for each hold shelf item, with a link to the requests queue.
- The following modifications were made to request notifications:
  - The request type is now available in all request notifications, under **<notification_data> > <request> > <request_type>** in the XML. Possible values are:
    - PATRON_PHYSICAL
    - GENERAL_HOLD
    - WORK_ORDER
    - PHYSICAL_TO_DIGITIZATION
    - ELECTRONIC_TO_DIGITIZATION
    - LIBRARY_PHYSICAL_DIGITIZATION
    - LIBRARY_ELECTRONIC_DIGITIZATION
    - STAFF_PHYSICAL_DIGITIZATION
    - STAFF_ELECTRONIC_DIGITIZATION
    - USER_PURCHASE_REQUEST
    - TRANSIT_FOR_RESHELVING
    - MOVE_TO_PERMANENT
    - MOVE_TO_TEMPORARY
    - RESTORE
    - RESOURCE_SHARING_PHYSICAL_SHIPMENT
    - RESOURCE_SHARING_P2D_SHIPMENT
    - RESOURCE_SHARING_E2D_SHIPMENT
    - BOOKING
  - All request notifications now contain more complete metadata for the requested resource. The data is under **<notification_data> > <request> > <record_display_section>** in the XML.

- All request notifications now contain pickup location information. The data is under **<notification_data> > <request> > <delivery_address>** in the XML. The field can contain a library name, a circulation desk name, a department name, or a patron home/work address (depending on the pickup location of the request).
- The Edit Reading List Citation page now contains two tabs: **Citation** and **Notes**. The **Notes** tab enables you to add notes to a citation.

Resource Sharing

The following sections describe the features provided for the Resource Sharing functional area in the July 2015 release of Alma**.**

Converting Hold Requests to Resource Sharing Borrowing Requests

Description

When your library is not able to, or willing to, fulfill a hold request, you can now convert the request to a resource sharing borrowing request.

The link **Convert to Resource Sharing** appears on the Pick Up Requested Resources (**Fulfillment > Resource Requests > Pick From Shelf**) page beneath hold requests. On this page, if there are multiple requests aggregated into a single request, all of these requests are converted with this action.

In addition, the link appears on the Resource Request Monitoring (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**) page beneath hold requests when all of the following are true:

- It is a **Hold** or **General Hold** request (request for holding without item)
- The workflow step is **Not Activated**, **Pickup-From Shelf**, or **Waiting for Remote Storage**.
- The user has the new **CONVERT_HOLD_TO_BORROWING** privilege (see the **Role Privileges** table). This privilege was added by default to the **Fulfillment Services Manager** role. Contact Ex Libris to add this privilege to other roles.

When you click the link, Alma converts the request if:

- The request's **Date Needed By** has not passed.
- The requested pickup location is supported for resource sharing requests.

Step-by-Step Instructions

The following role can convert a hold request to a resource sharing request:

- Fulfillment Services Manager

To convert a hold request to a resource sharing request:

1 Locate the required request (**Fulfillment > Resource Requests > Monitor Requests & Item Processes** or **Fulfillment > Resource Requests > Pick From Shelf**).

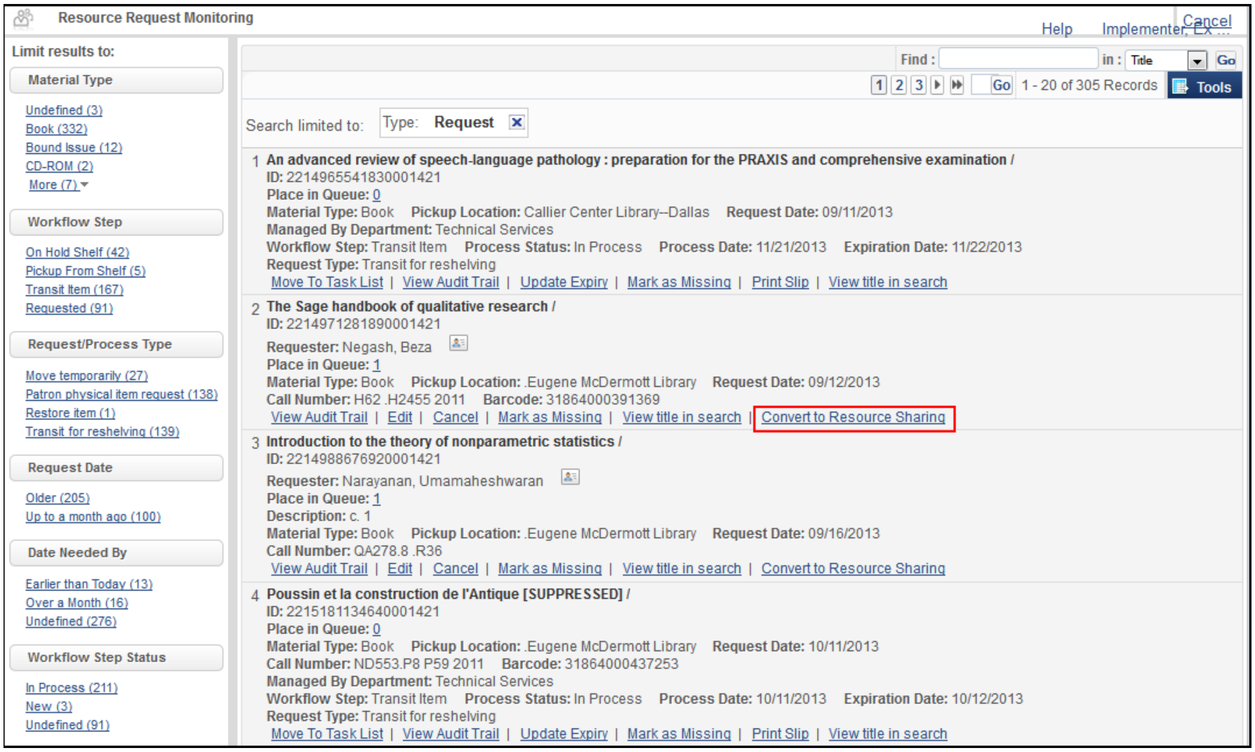


Figure 53 - Hold Request in List

2 Click **Convert to Resource Sharing** underneath the request and click **Confirm** in the confirmation dialog box. The request is converted to a resource sharing request.

Restricting Resource Requests to a Reading Room

Description

Alma now supports restricting a patron's access for a received item from a resource sharing request to a reading room. When this feature is used, the patron's requested pickup location is replaced with the selected reading room location, thereby restricting the item's usage to a reading room only.

Several fields were added at different locations in the Alma user interface to support this feature.

Step-by-Step Instructions

The following roles can restrict access to a patron's request to the reading room:

- Fulfillment Services Manager
- Fulfillment Services Operator

To restrict access to a patron's request to the reading room:

1 You can perform this action on any of three pages in the UI:

- When editing a borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**, click **Edit** beneath a request), select **For Reading-Room Use Only** in the **Request Attributes** pane.

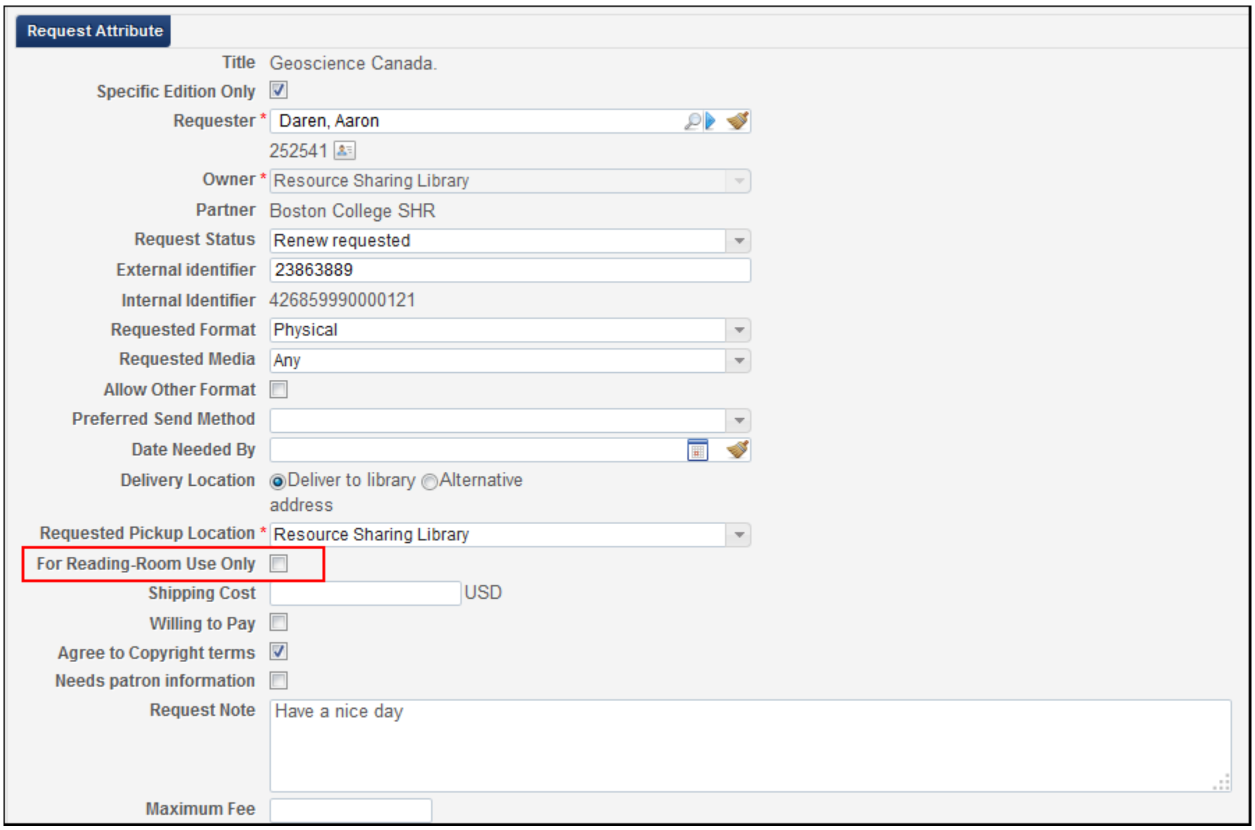


Figure 54 - Editing a Borrowing Request

Note that the name of the **Pickup At** field is now **Requested Pickup Location**.

- When receiving a borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**, click **Receive** beneath a request), select **For Reading-Room Use Only** in the **Received Items** pane.

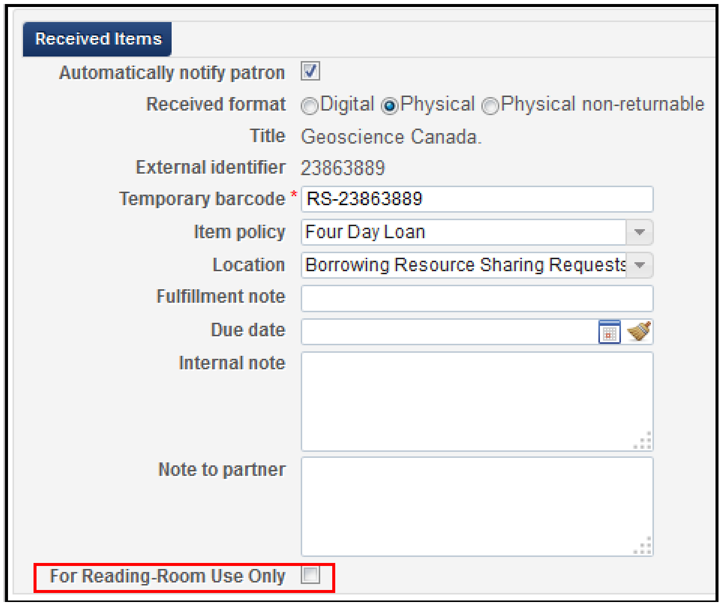


Figure 55 - Receiving a Borrowing Request

- When receiving an item on the Receive Items page (**Fulfillment > Resource Sharing > Receiving Items**), enter the item information, click **OK**, and select **For Reading-Room Use Only** in the dialog box.

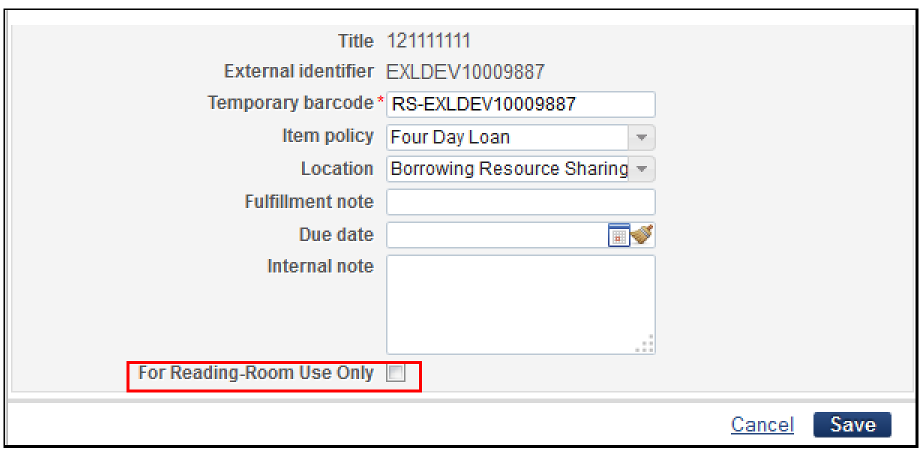


Figure 56 - Dialog Box on Receiving an Item

2 When editing or when receiving a borrowing request, after you select **For Reading-Room Use Only**, the field **Actual Pickup Location** appears. Select the pickup location.

Support for a Resource Sharing Renewal Fee

Description

Alma now supports charging a fee when a patron renews a resource sharing item. The renew fee is added to the Borrowing Resource Sharing Terms of Use and automatically applied for any resource sharing renewal.

The fee is charged only when the item is renewed, not when the renew request is made, since the request may be rejected.

Step-by-Step Instructions

The following roles can add a resource sharing renew fee to the Terms of Use:

- Fulfillment Administrator
- General System Administrator

To add the resource sharing renew fee clause to the Terms of Use:

1. Ensure that you are logged in to a resource sharing library.
2. Edit a Terms of Use of type **Borrowing Resource Sharing** on the Terms of Use Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**). The Terms of Use Details page appears.

   For more information, see **Configuring Terms of Use** in the *Alma Fulfillment Guide* or Alma online help.

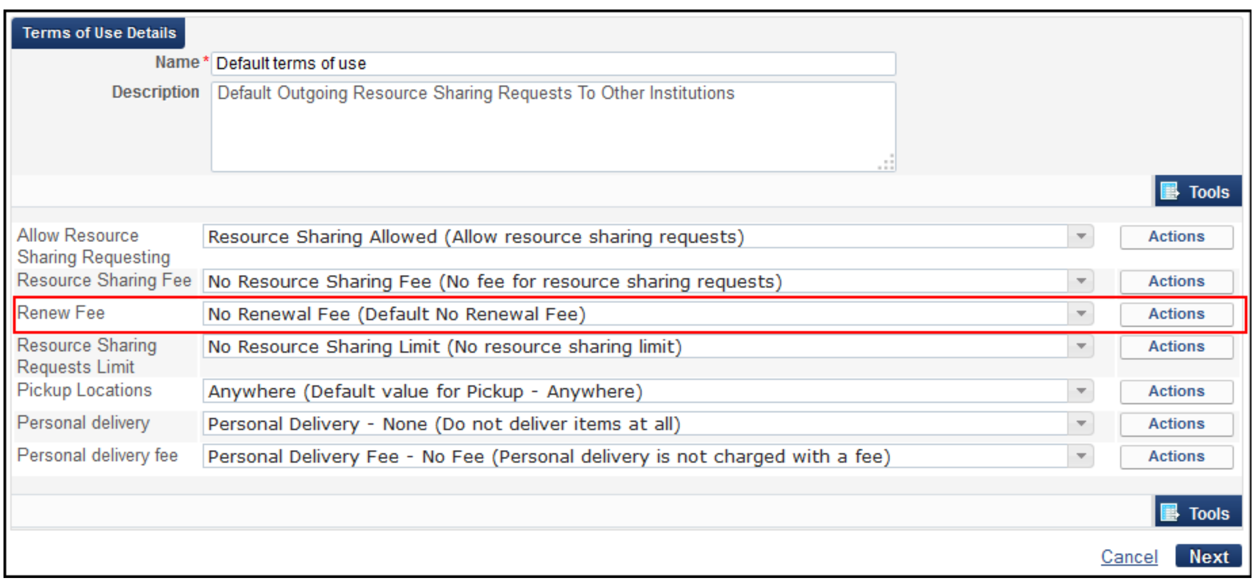


Figure 57 - Renew Fee in Borrowing Resource Sharing Terms of Use Details

3 Select a **Renew Fee** policy from the existing list. To create a new policy:

a Select **Actions > Edit Policy via Add** in the **Renew Fee** line. The Policy Details page appears.

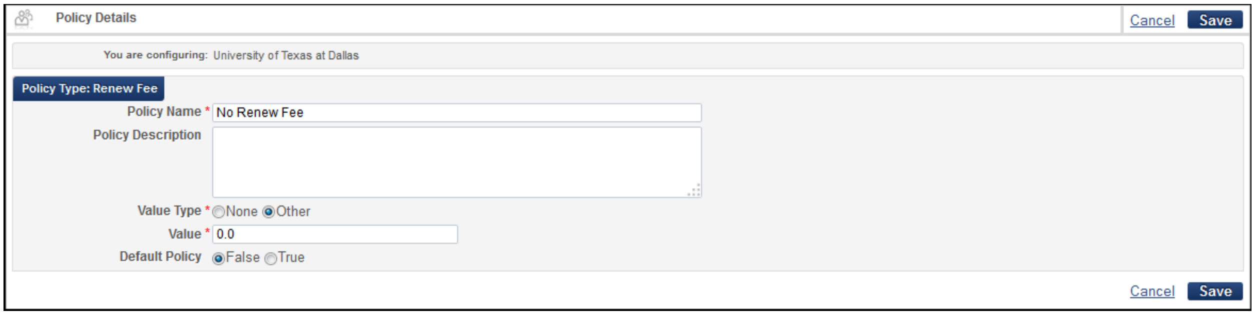


Figure 58 - Policy Details

b Enter the new policy name and description, select **Other** for **Value Type**, and enter the value of the renew fee in the **Value** field.

c Select whether this is the default policy for resource sharing renewals.

d Click **Save**. The new policy is added. Ensure that the new policy is selected.

4 Click **Next** and click **Save**. The Terms of Use is updated.

To manage the resource sharing renew fee for a specific user:

- The renew fee appears in the **Fines/Fees** tab on the User Details page. You can tell the difference between a standard loan renew fee and a resource sharing renew fee by the value in the **Comment** column.

Figure 59 - Resource Sharing Renew Fee in User Details

- You can refund a resource sharing renew fee like any other refundable fee.
- Additional configuration is available in the **Fine Fee Type Definition** table (**Administration > User Management Configuration > Configuration Menu > Patron Charges > Fines/Fees Behavior**). In this table, changes to **Renew Fee** apply to both standard loan and resource

sharing renew fees. For more information, see **Patron Charges** in the *Alma Administration Guide* or Alma online help.

Other Resource Sharing Enhancements

- A new link was added to the Tasks menu: **Borrowing requests with active notes**. This link leads to the Resource Sharing Borrowing Requests page, filtered by **Notes from Partner**.
- A **Refresh** button was added to the borrowing and lending task lists.
- The Send Overdue Message to Borrower job name was changed to **Send Overdue Message to Resource Sharing Borrowing Partner**.
- As part of the locate process, Alma can now check whether serials are requestable and available.
- The ISO symbol field was renamed **Symbol** on the Organization Unit Details Summary tab (**Administration > General Configuration > Configuration Menu > Add a Library or Edit Library Information**; **Libraries** tab, edit resource sharing library).
- When the Primo resource sharing form defaults to the type **Article**, the **Format** under **Delivery Information** defaults to **Digital** and the **Delivery location** defaults to **Alternative address**.

Administration

The following sections describe the features provided for the Administration functional area in the July 2015 release of Alma**.**

Sending Notifications to Users

Description

Alma can send notifications to a user-defined set of users.

The job **Update User Info** was changed to **Update/Notify Users**. The new **User Notification Types** table includes a default notification indicating that the receiver's password was changed. You can add additional notification types.

When running an **Update/Nofity Users** job (see below), you can select the notification type.

Step-by-Step Instructions

The following roles can configure user notifications:

- General System Administrator
- Letter Administrator

The following roles can run the **Update/Notify Users** job:

- User Manager
- User Administrator

To configure the notification types and letters:

1 Add, edit, or remove notification types in the **User Notifications Types** table (**Administration > User Management Configuration > Configuration Menu > General > User Notification Types**).

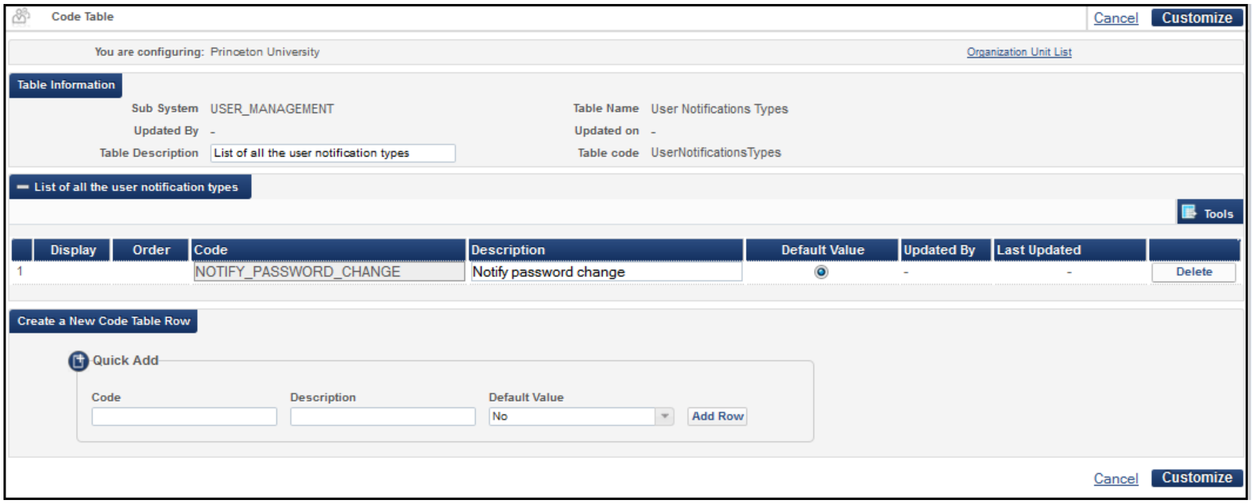


Figure 60 - User Notification Types

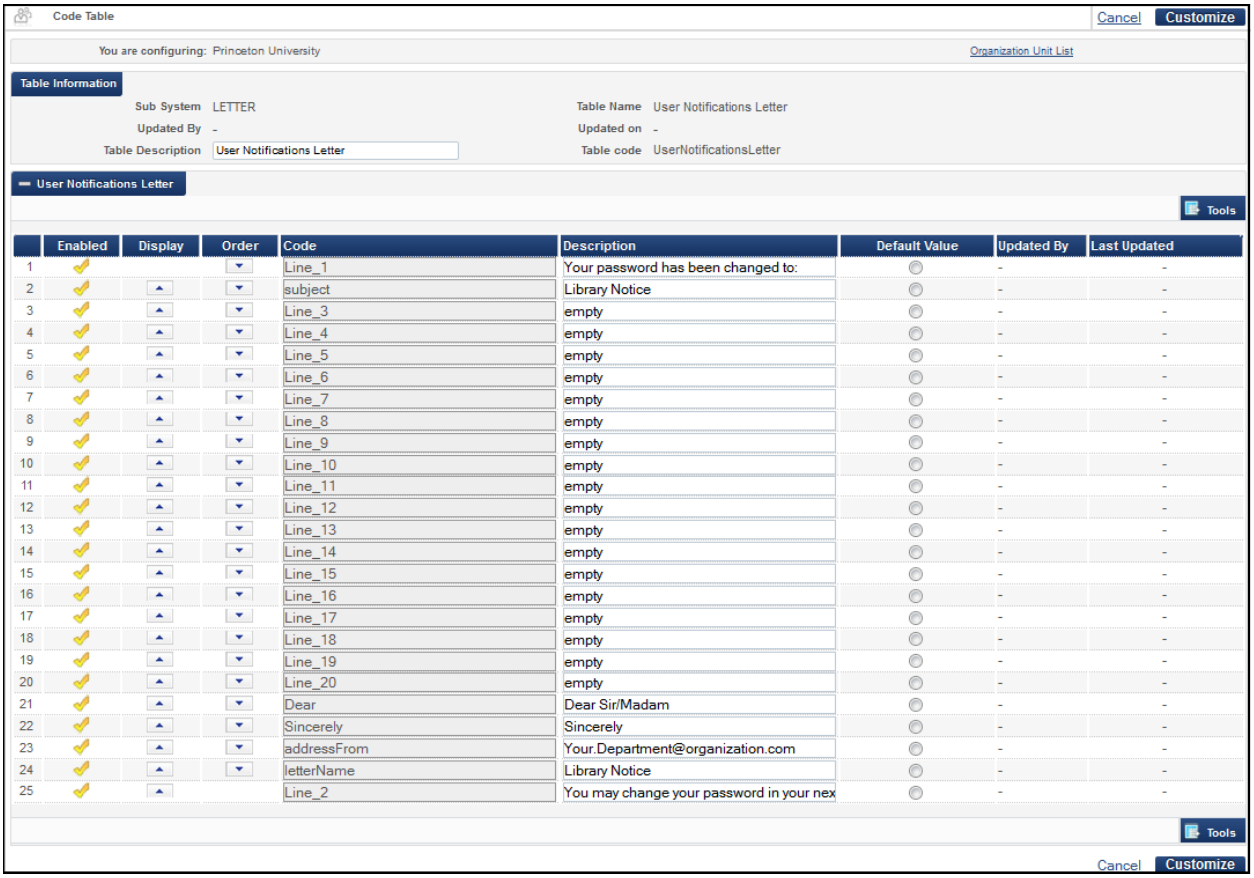
2 When you are done, click **Customize**.

If you added a notification type, you will require its code in the following step.

3 Configure the User Notifications Letter and its fields for the Notify Password Change letter, as required:

- **Administration > General Configuration > Configuration Menu > General Configuration > Letter Emails**; select **Actions > Customize** in the **User Notifications Letter** row.

  Add any required fields for any additional notification types you added in step 1.



Code Table

Cancel | Customize

You are configuring: Princeton University

Organization Unit List

Table Information

Sub System	LETTER	Table Name	User Notifications Letter
Updated By	-	Updated on	-
Table Description	User Notifications Letter	Table code	UserNotificationsLetter

User Notifications Letter

Tools

	Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated
1				Line_1	Your password has been changed to:		-	-
2				subject	Library Notice		-	-
3				Line_3	empty		-	-
4				Line_4	empty		-	-
5				Line_5	empty		-	-
6				Line_6	empty		-	-
7				Line_7	empty		-	-
8				Line_8	empty		-	-
9				Line_9	empty		-	-
10				Line_10	empty		-	-
11				Line_11	empty		-	-
12				Line_12	empty		-	-
13				Line_13	empty		-	-
14				Line_14	empty		-	-
15				Line_15	empty		-	-
16				Line_16	empty		-	-
17				Line_17	empty		-	-
18				Line_18	empty		-	-
19				Line_19	empty		-	-
20				Line_20	empty		-	-
21				Dear	Dear Sir/Madam		-	-
22				Sincerely	Sincerely		-	-
23				addressFrom	Your.Department@organization.com		-	-
24				letterName	Library Notice		-	-
25				Line_2	You may change your password in your nex		-	-

Tools

Cancel | Customize

Figure 61 - User Notifications Letter Fields

- **Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**; click **Customize** in the **User Notifications Letter** row.

  Add any required XSL clauses for the new fields. For example, this is a conditional clause that inserts fields for the out-of-the-box notification NOTIFY_PASSWORD_CHANGE:

```
<xsl:choose>
 <xsl:when test="notification_data/notification_type =
'NOTIFY_PASSWORD_CHANGE' ">
  <tr>
   <td>
    <h3>@@Line_1@@</h3>
    <xsl:value-of select="notification_data/temp_password" />
   </td>
  </tr>
  <tr>
   <td>
    <h3>@@Line_2@@</h3>
   </td>
  </tr>
 </xsl:when>
</xsl:choose>
```

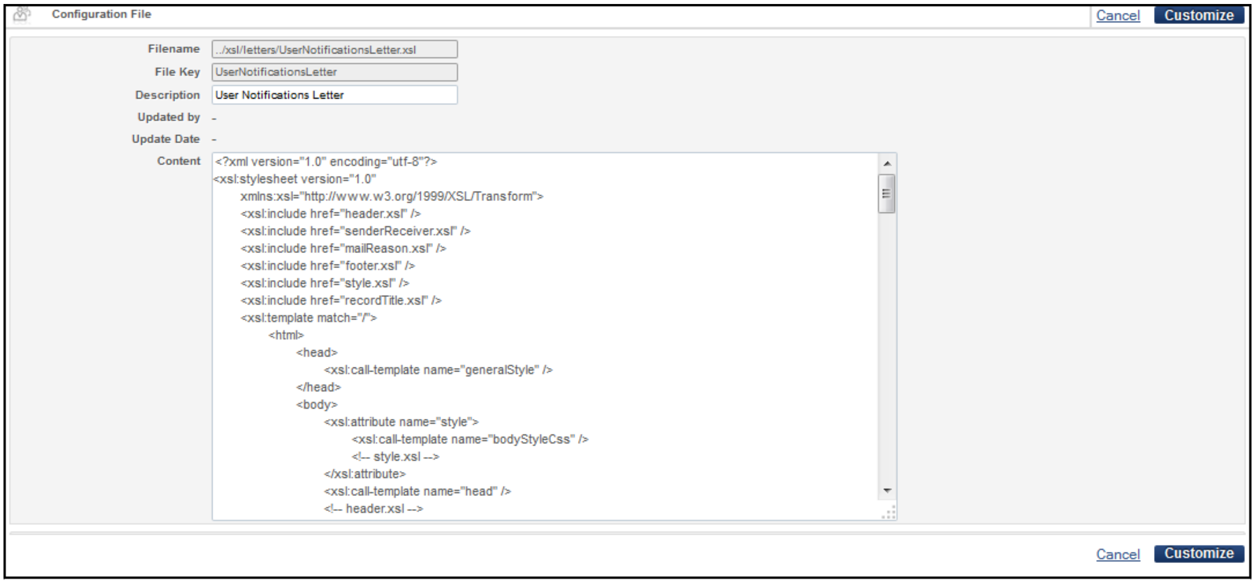


Figure 62 - User Notifications Letter

For more information on the above steps, see **Configuring Alma Letters** in the *Alma Administration Guide* or Alma online help.

To send notfications to users:

1 Create the set of users to update; for more information, see **Users Sets** in the *Alma Administration Guide* or Alma online help.

2 Run an **Update/Notify Users** job; for more information, see **Running Jobs on Defined Sets** in the *Alma Administration Guide* or the Alma online help.

While configuring the job parameters, select the **Send Notification to User** check box and select the notification type to send to the users.

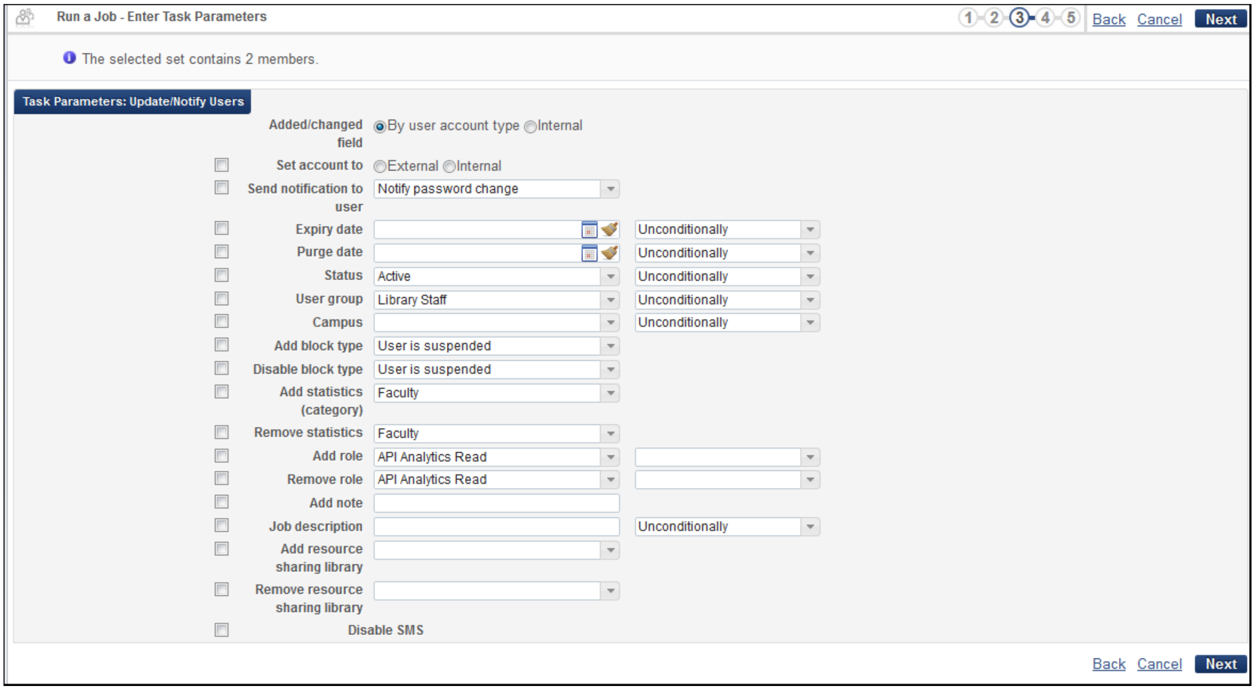


Figure 63 - Update/Notify Job Parameters

The users are notified.

Converting Users from External to Internal in Bulk

Description

Alma now enables you to convert a set of external patrons to be internal users. This is useful, for example, when a group of patrons is graduating from your university and will no longer be managed by the university system but you want to allow them to continue using the library. These patrons can continue to use Alma and retain their usage history, including any requests, checked-out books, fines, and so forth.

After making bulk changes on the set of patrons, Alma sets all of their passwords to `firstname_lastname` and (if the user selects to notify the users) notifies the users of the change in their credentials.

Step-by-Step Instructions

The following role can convert users from external to internal in bulk:

- User Manager
- User Administrator

To convert users from external to internal in bulk:

1. Create the set of external users to convert; for more information, see **Users Sets** in the *Alma Administration Guide* or Alma online help.
2. Run an **Update/Notify Users** job; for more information, see **Running Jobs on Defined Sets** in the *Alma Administration Guide* or Alma online help. While configuring the job parameters:
   a. Select the **Set Account To** check box and select **Internal**.

      Note that the **Set Account To** check box replaces the previous **Set to External Account** check box. Also, **Field Type** was changed to **Added/Changed Field**.
   b. Optionally, select the **Send Notification to User** check box and select the notification type to notify the users after the change.
   c. Select or enter all other required parameters and run the job.

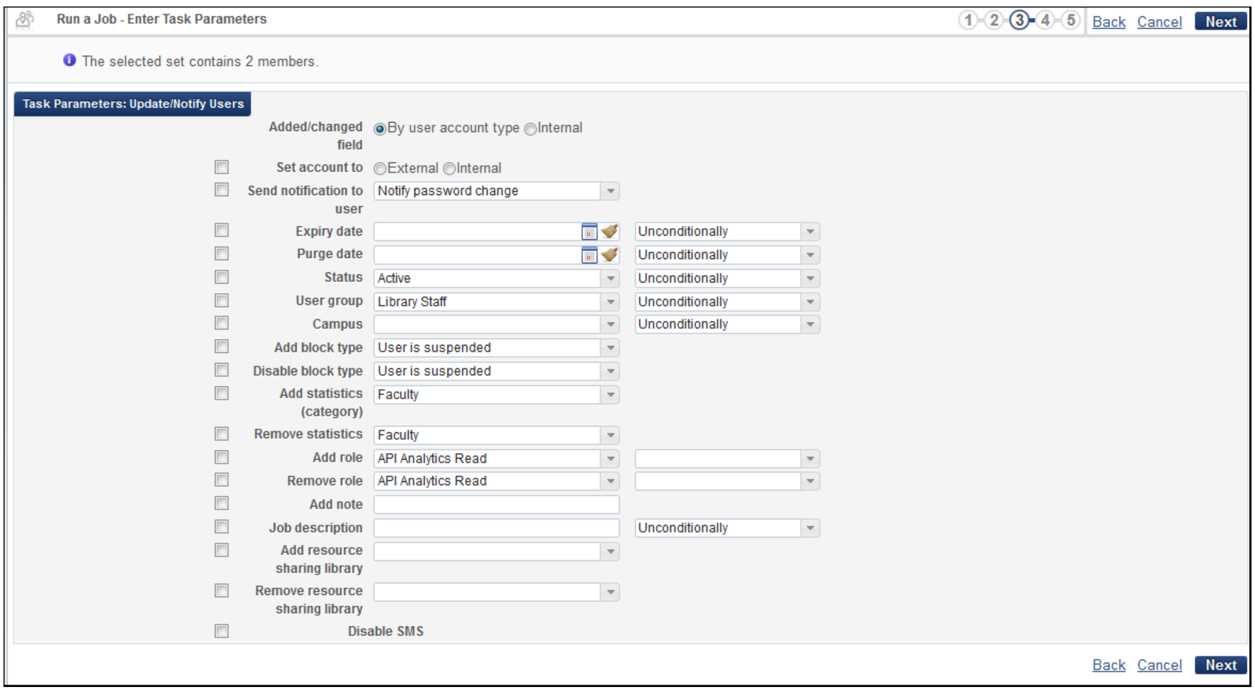


Figure 64 - Update/Notify Job Parameters

The users are converted to internal users. If you selected to notify the users, notifications are sent to users whose accounts are changed.

New HealthCheck Tool Tests

The following new HealthCheck tool tests have been added for the Acquisitions functional area:

- **Not able to create an invoice (manually and/or batch)** – Checks whether it is possible to create an invoice.

- **Not able to export an invoice for payment** – Checks whether it is possible to export invoices for payment.
- **Physical material can't be received** – Checks that all libraries are assigned to an acquisition department and that an operator is assigned to the department.
- **Global e-resources are not activated** – Checks the database to see that portfolios and e-collections have been activated and that there are operators in the library that can activate e-resources.

Other Administration Enhancements

- A Confirmation dialog box was added to the Purge User Records page (**Administration > User Management > Purge User Records**).
- Demerits information for a user is now displayed in the **Demerits** tab on the User Details page. The tab is displayed only for Alma users with the privilege **VIEW_DEMERITS_TAB_PRIVILEGE**. The new privilege was added to the following roles as disabled:
  - Circulation Desk Manager
  - Circulation Desk Operator
  - Circulation Desk Operator - Limited
  - Fulfillment Administrator
  - Fulfillment Services Manager
  - Fulfillment Services Operator

  To enable this privilege for one of these roles, contact Ex Libris Support.

Collaborative Networks and Multicampus Institutions

The following sections describe the features provided for the collaborative networks and multicampus institutions functional areas in the July 2015 release of Alma**.**

Monitoring Collaborative Network Jobs Across Institutions

Description

The Network Zone can now monitor the jobs run by member institutions of a collaborative network.

Step-by-Step Instructions

The following roles have access to the Monitor Jobs page and can monitor the jobs that are relevant to their roles:

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

To access this feature:

From the Network Zone, open the Monitoring Jobs page (**Administration > Manage Jobs > Monitor Jobs**). The following enhancements have been made to the Running and History tabs:

- A new **Institution Name** filter has been added that allows you to filter the results to view jobs run by a member institution, the Network Zone, or all institutions.
- The existing filter has been renamed **Job Category** filter.

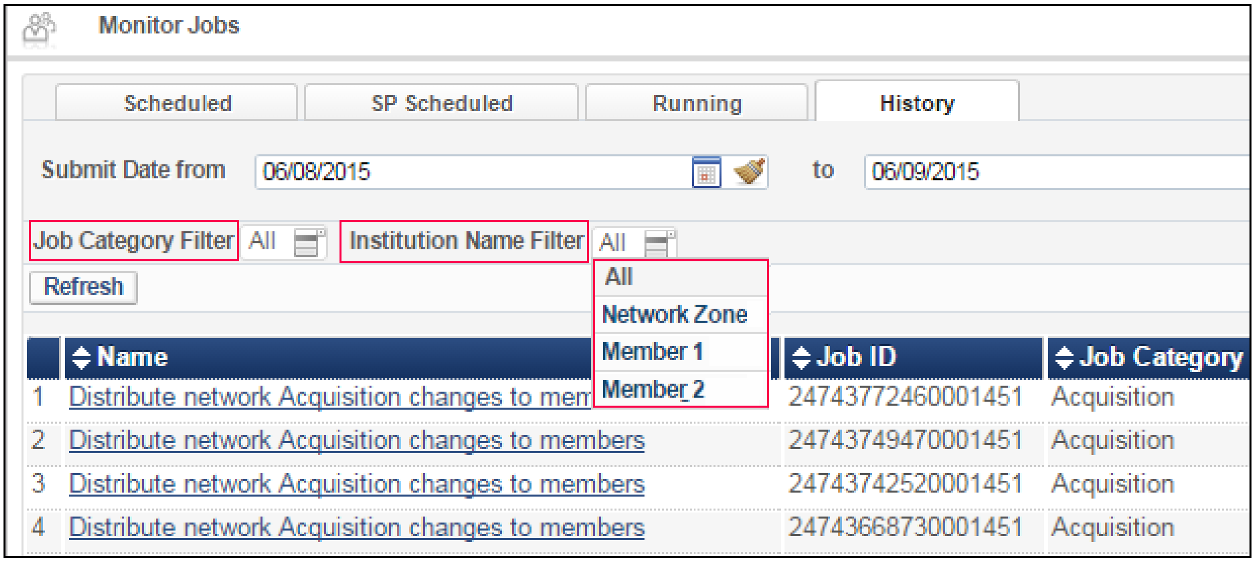


Figure 65 – Monitor Jobs – History Tab

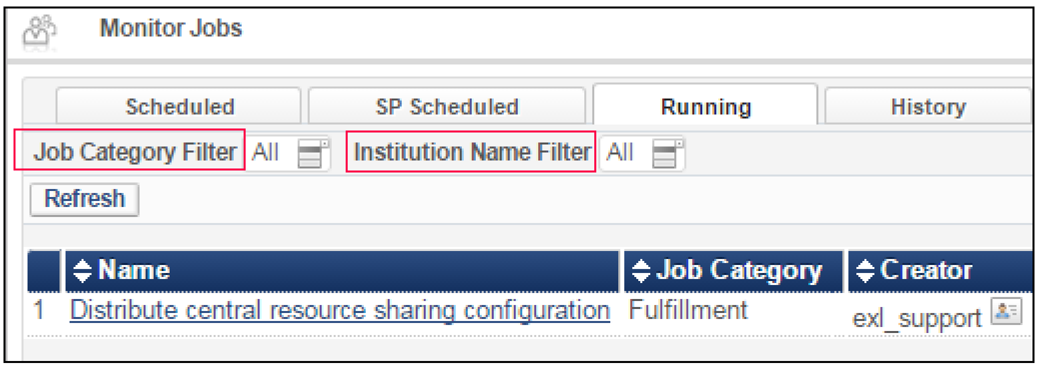


Figure 66 – Monitor Jobs – Running Tab

Notes:

- The Network Zone cannot abort a job run by member institutions.
- For the Network Zone, report and event data is read-only; there are no Actions buttons or links inside the report.

Facilitate Switching Between Institutions

Description

Members of a collaborative network can now easily switch between member institutions for which they have a user account.

In collaborative networks that use SAML single sign-on (SSO), users can switch between member institutions without having to log in separately to each institution.

Step-by-Step Instructions

To access this feature:

A new **Institutions** link now appears at the top of all pages in Alma for the Network Zone and member institutions in a collaborative network.

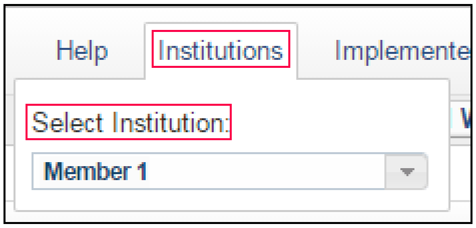


Figure 67 – Institutions Link

1 Click the **Institutions** link to display a drop-down list of all the institutions in the collaborative network.

2 Select the member institution to which you want to log in.

The Alma home page of the member institution you selected opens.

Note: You must have an account in the member institution to log in to it.

Additionally, you can configure a widget for the Alma home page that allows you to switch between member institutions.

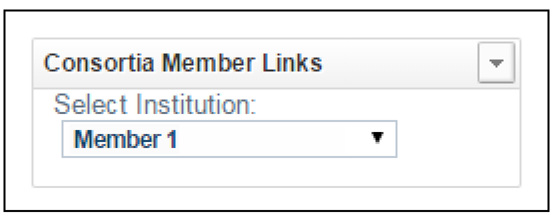


Figure 68 – Institutions Link - Widget

For more information about configuring widgets, see the **Widgets** section of the *Alma Administration Guide* or the Alma online help.

Central Cataloging Enhancements

Description

With the July release, Alma provides additional support for collaborative networks that, as a central cataloging policy, only permit cataloging in the Network Zone, not the Institution Zone. With this new capability, Alma provides a new parameter setting for central record management that prevents institutions from creating local Institution Zone records. This affects the following areas where local Institution Zone records can be created:

- MD Editor new record creation/copy cataloging (import from an external resource)
- Metadata Import
- Quick Cataloging
- MARC Record Simple View copying

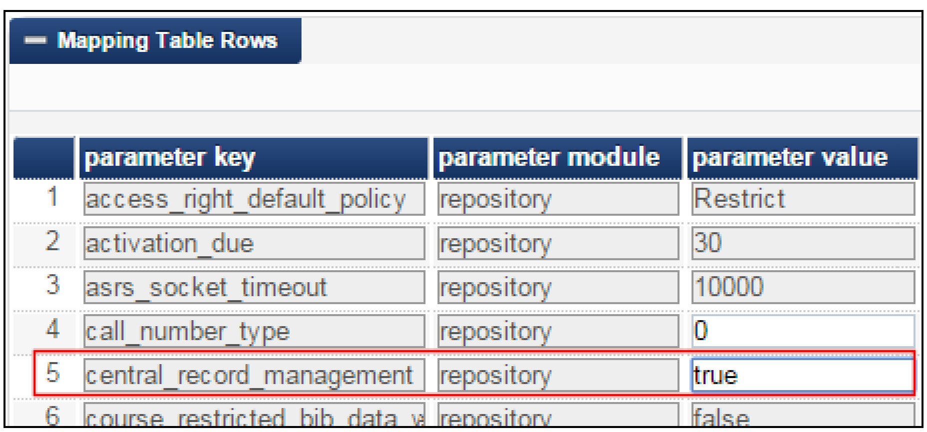
Step-by-Step Instructions

The following roles can view/manage the new parameters related to central cataloging in the Network Zone:

- Catalog Administrator
- General System Administrator

To set the central_record_management parameter from the Network Zone:

1. In the **General** section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) click **Other Settings** to open the **Mapping Table** page.
2. Click **Customize** for the parameter key `central_record_management`.
3. Set the parameter value to `true`.


Mapping Table Rows

	parameter key	parameter module	parameter value
1	access_right_default_policy	repository	Restrict
2	activation_due	repository	30
3	asrs_socket_timeout	repository	10000
4	call_number_type	repository	0
5	central_record_management	repository	true
6	course_restricted_bib_data_v	repository	false

Figure 69 - central_record_management Parameter Set to True

The **Customize** button changes to **Actions** with the following options:

- Manage in Network
- Restore

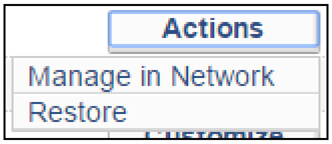
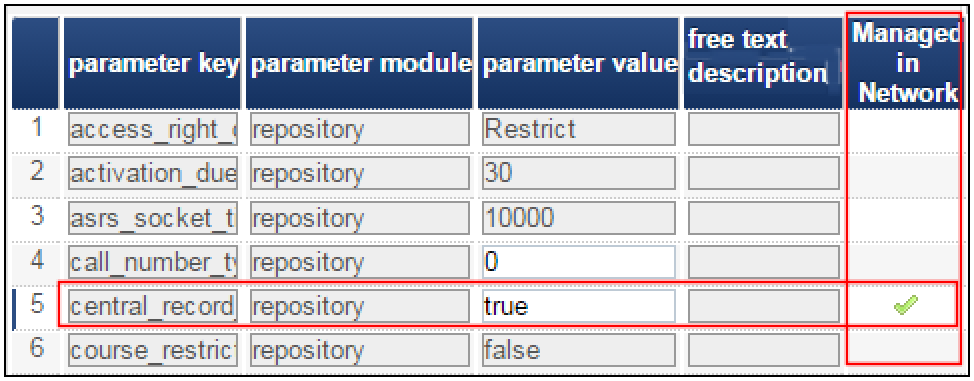


Figure 70 - Network Zone Actions Button

4 Select **Manage in Network** to identify this setting for distribution to the member institutions.



	parameter key	parameter module	parameter value	free text description	Managed in Network
1	access_right_(	repository	Restrict		
2	activation_due	repository	30		
3	asrs_socket_t	repository	10000		
4	call_number_ty	repository	0		
5	central_record	repository	true		✔
6	course_restric	repository	false		

Figure 71 - Network Zone Managed in Network Setting

5 Click **Save and Distribute** to have this setting copied to the member institutions (along with all the other settings identified as **Managed in Network**).

To view the MD Editor changes when central_record_management is set to true:

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

2 Select **File > Options**.

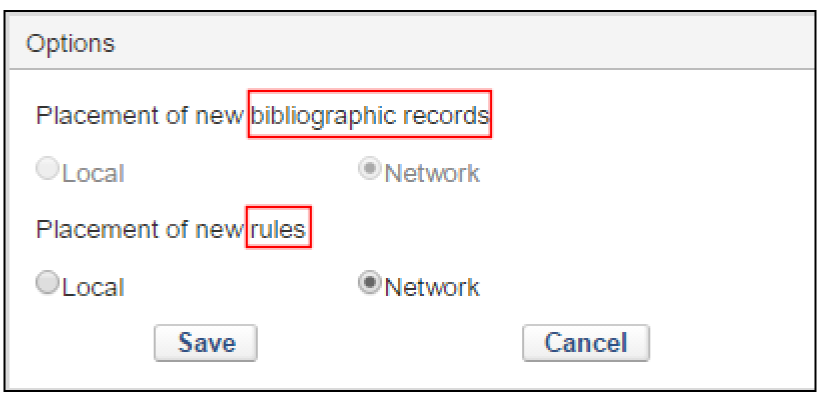


Figure 72 - MD Editor File Menu > Options

The placement of bibliographic records and rules can be handled independently. Since `central_record_management` is set to `true`, the placement of bibliographic records defaults to the Network Zone and cannot be changed, while the placement of rules can be done either locally or in the Network Zone.

3 View the File menu.

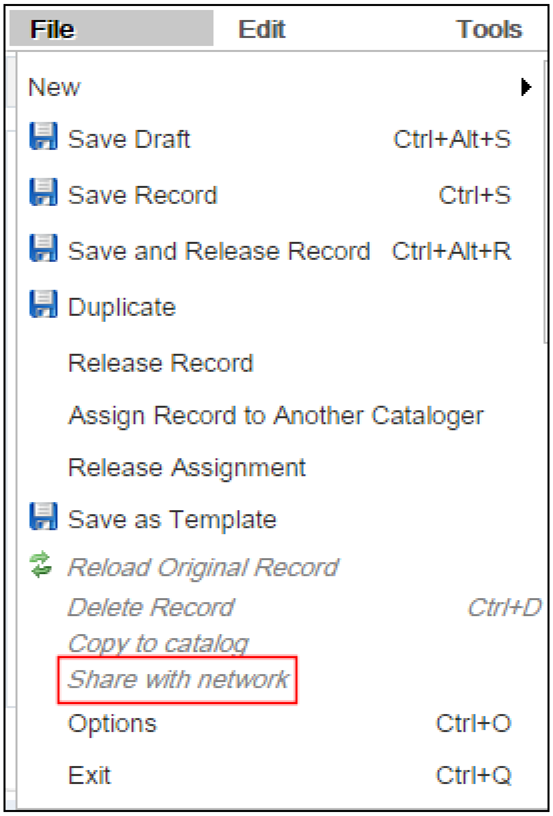


Figure 73 - MD Editor File Menu > Share with Network

The Share with Network option remains a part of the menu for times when member institutions may have local (Institution Zone) records that perhaps came across as part of the migration process and those records need to be shared with the Network Zone. This is not an available option for new records, and usually this is an inactive option when central_record_management is set to true.

To view the handling of local portfolios and their related bibliographic records when central_record_management is set to true:

1 Open the New Portfolio page (**Resource Management > Create Inventory > Add Local Portfolio**).

2 Create a new (local) portfolio and click **Save**. The new (local) portfolio appears in the Institution tab on the Repository Search page with the local icon.

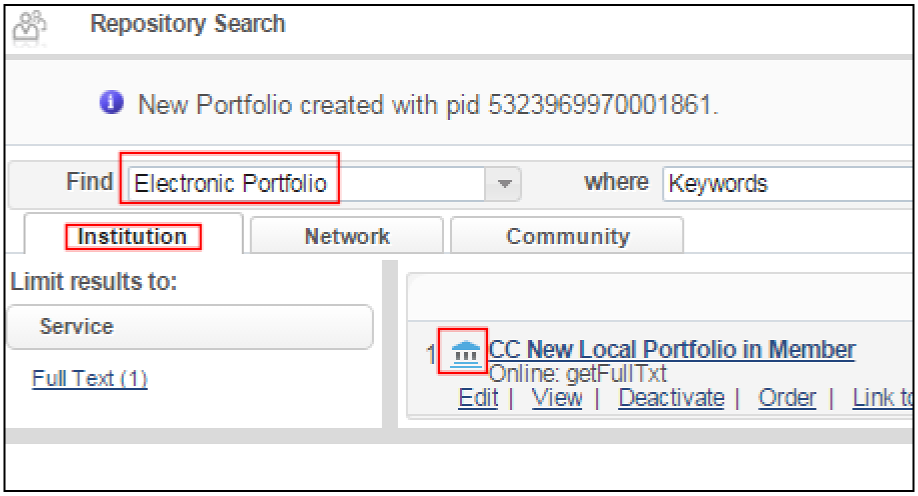


Figure 74 - New Local Portfolio in the Member Institution with central_record_management Set to True

3 Complete an **All titles** search for the new local portfolio in the Institution tab. The bibliographic record appears in the Institution tab on the Repository Search page with the Network icon showing that the bibliographic record for the newly created local portfolio was stored in the Network Zone.

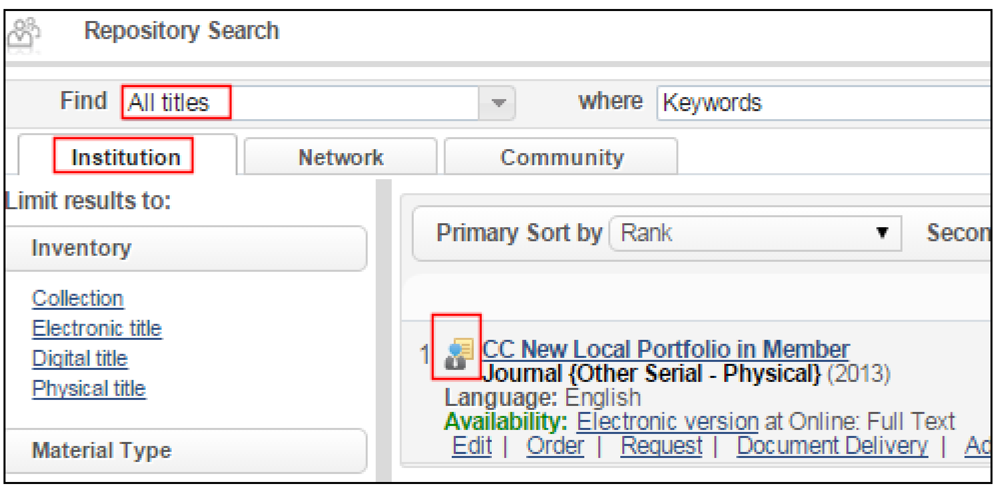


Figure 75 - All Titles Search for a New Local Portfolio in the Member Institution with central_record_management Set to True

4 Complete an **All titles** search for the new local portfolio in the **Network** tab. The bibliographic record appears in the Network tab on the Repository Search page with the local icon indicating that the institution has inventory associated with the network bibliographic record.

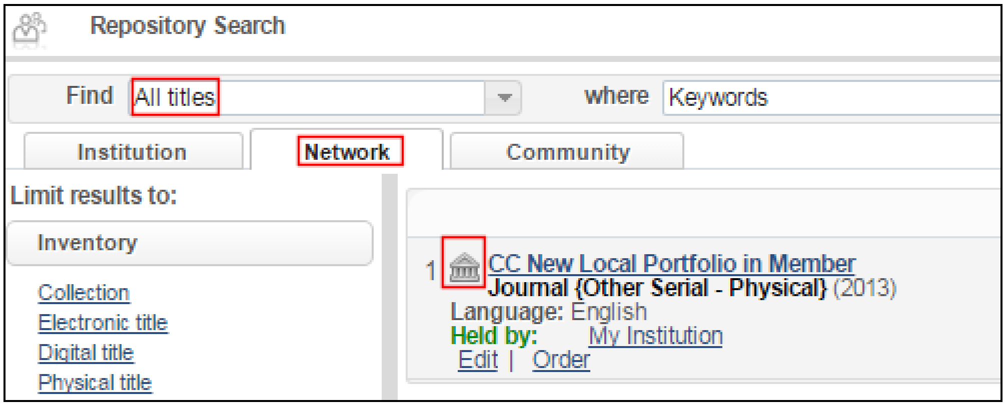


Figure 76 - All Titles Search in the Network Tab for a New Local Portfolio in the Member Institution with central_record_management Set to True

To view the handling of local portfolios and their related bibliographic records when central_record_management is set to false:

1. Open the New Portfolio page (**Resource Management > Create Inventory > Add Local Portfolio**). The new parameter, **Placement of new record**, appears enabling the user to select either the **Network** or **Institution** for the placement of the bibliographic record.

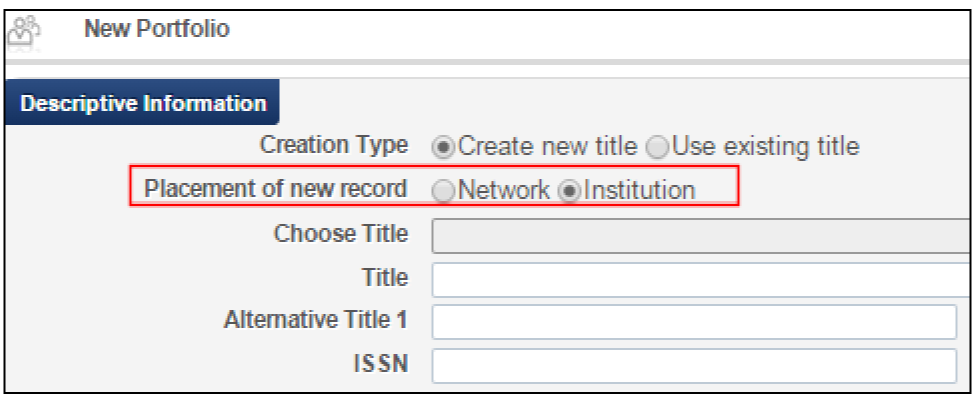


Figure 77 - Add New Local Portfolio with central_record_management Set to False

2. Select **Network** or **Institution** for your new title and complete the remainder of the parameters as you normally would.

To view the quick cataloging (Add Physical Item) changes when central_record_management is set to true:

1. Open the Quick Cataloging page (**Resource Management > Create Inventory > Add Physical Item**) by selecting **New** for **Choose Holding Type** and click **Choose**. Or open the Quick Cataloging page from patron fulfillment (**Fulfillment > Checkout/Checkin > Manage Patron Services**, enter the patron's ID, click **Go**, and click **Create Item**).

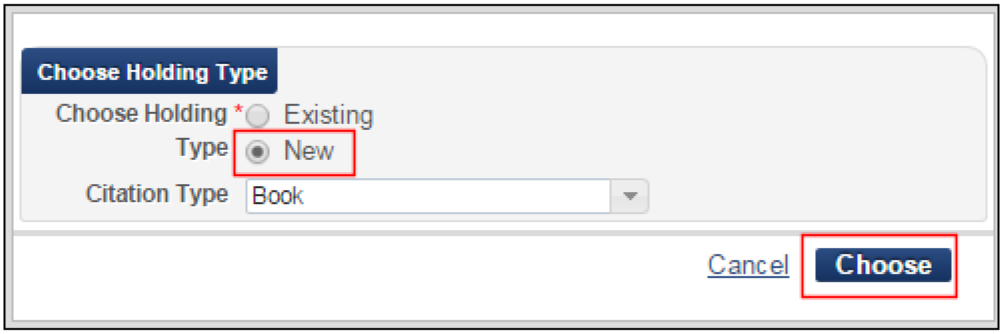


Figure 78 - Add Physical Item in the Member Institution with the central_record_management Set to True

2. Create a new (local) item and click **Save**.
3. Complete a **Physical items** repository search for the new (local) item. It appears in the Institution tab on the Repository Search page.

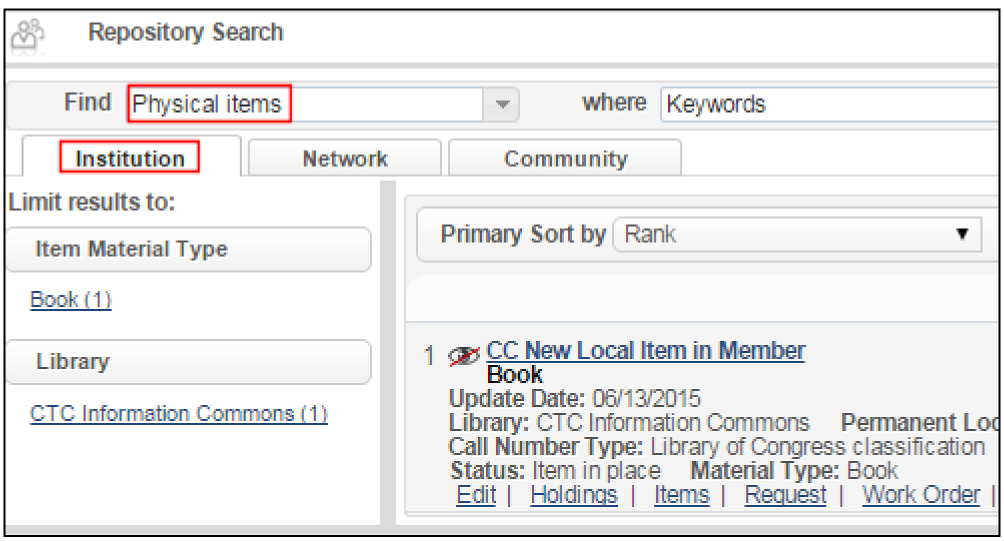


Figure 79 - New Local Item in the Member Institution with central_record_management Set to True

4. Complete a **Physical titles** search for the new local item in the Institution tab. The bibliographic record appears in the Institution tab on the Repository Search page with the Network icon showing that the bibliographic record for the newly created local item was stored in the Network Zone.

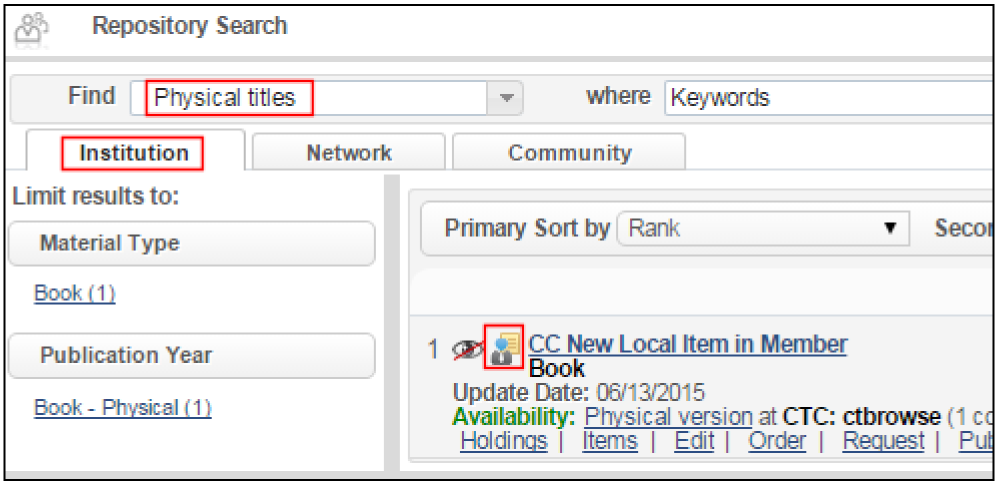


Figure 80 - All Titles Search for a New Local Portfolio in the Member Institution with central_record_management Set to True

5 Complete an **All titles** search for the new local item in the Network tab. The bibliographic record appears in the Network tab on the Repository Search page with the local icon indicating, that the institution has inventory associated with the network bibliographic record.

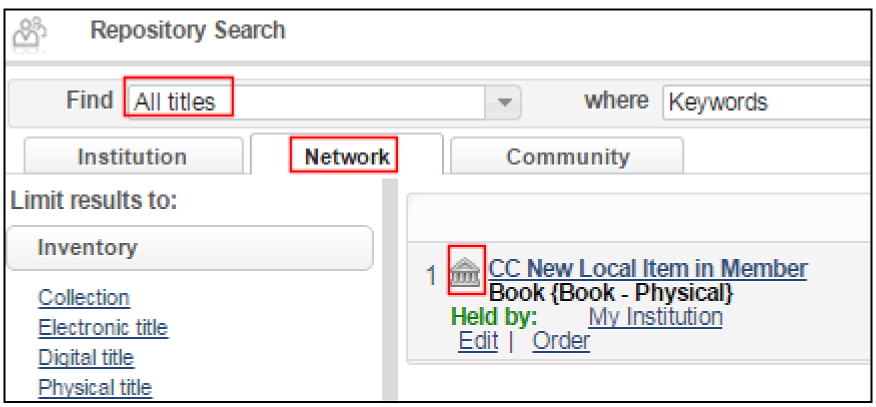


Figure 81 - All Titles Search in the Network Tab for a New Local Item in the Member Institution with central_record_management Set to True

To view the MARC Record Simple View copying changes when central_record_management is set to true:

1 Complete an **All titles** search from the Community tab in the repository search.

2 Click the title link for a record in your search results to open the title in the MARC Record Simple View page. The MARC Record Simple View page provides only the **Copy to Network** option to enable creating/copying the record in the Network Zone (not the Institution Zone).

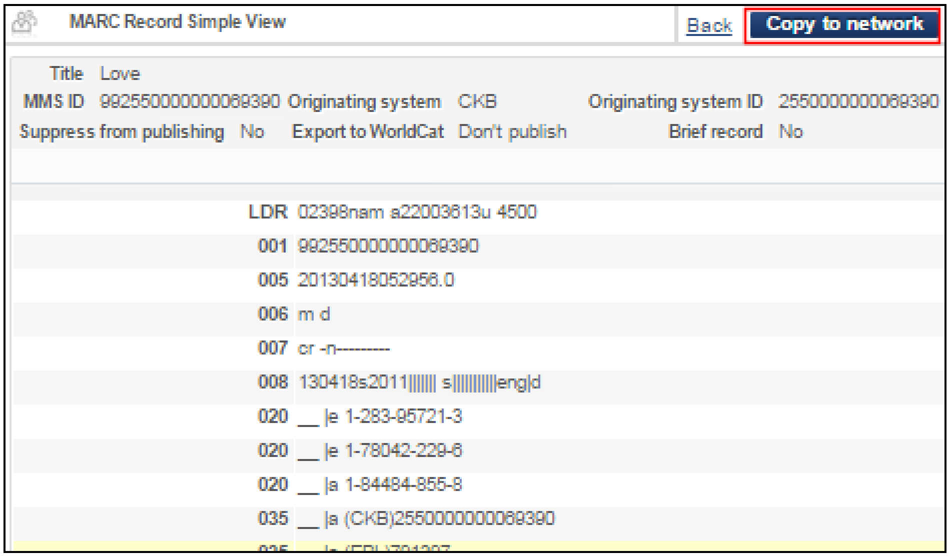


Figure 82 - MARC Record Simple View in a Member Institution with central_record_management Set to True

To view the import profile changes when central_record_management is set to true:

1 In the Record Import section of Resource Management Configuration (**Resource Management > Resource Configuration > Configuration Menu**) click **Import Profiles** to open the Import Profiles page.

2 Click **Add New Profile**.

3 Select the **Repository** profile type and click **Next**. The Import Profile Details page appears.

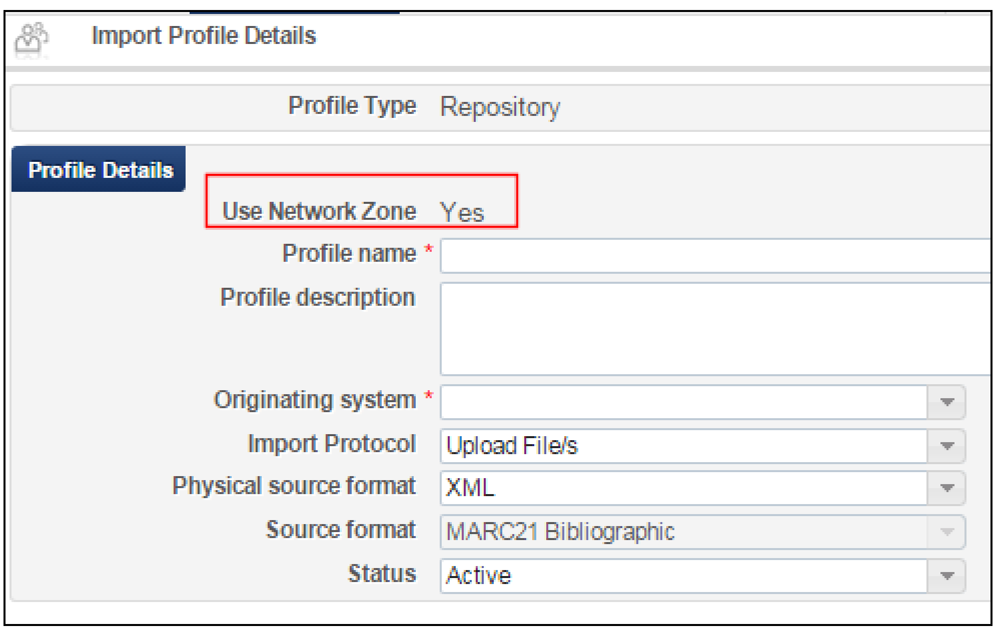


Figure 83 - Use Network Zone Parameter Locked with the Yes Setting

The **Use Network Zone** parameter is locked with the **Yes** setting versus the optional check box setting (see below).

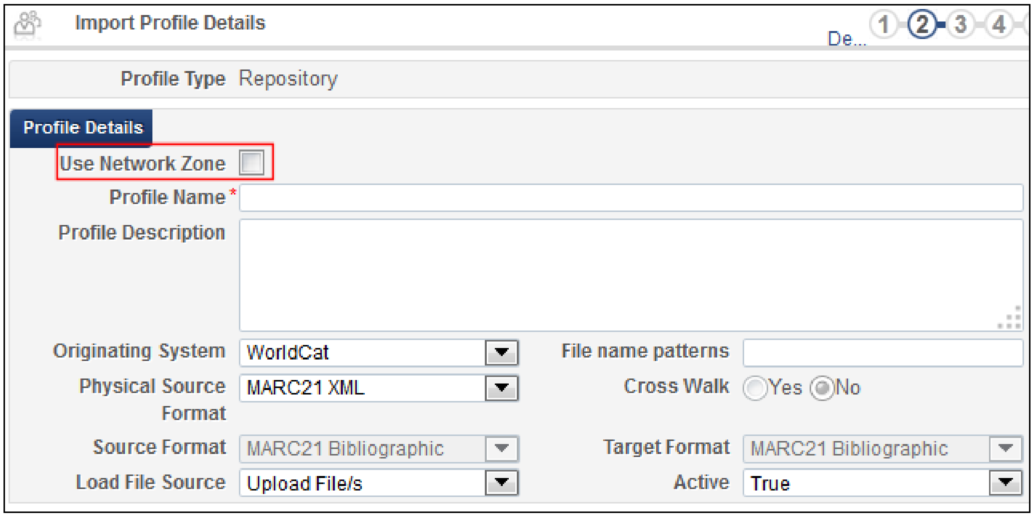


Figure 84 - Use Network Zone Parameter with the Optional Check Box

Creating Records in the Network Zone with the Portfolio Loader

Description

Central cataloging in collaborative networks is being enhanced with the ability to create and match bibliographic records in the Network Zone with the Alma Portfolio Loader.

When the `central_record_management` parameter is set to `true` and portfolios are imported locally using the Alma Portfolio Loader, the system checks for matching bibliographic records in the Network Zone; and when no bibliographic record match is found in the Network Zone, a new bibliographic record is added to the Network Zone to which the loaded portfolio is linked.

Staff will notice a new **Bibliographic** section in the Portfolio Loader wizard with the **Select catalog** options of **Institution** and **Network**. When the `central_record_management` parameter is set to `true`, the **Select catalog** option is set to **Network** and cannot be changed, thereby ensuring that bibliographic records are stored in the Network Zone (not the Institution Zone).

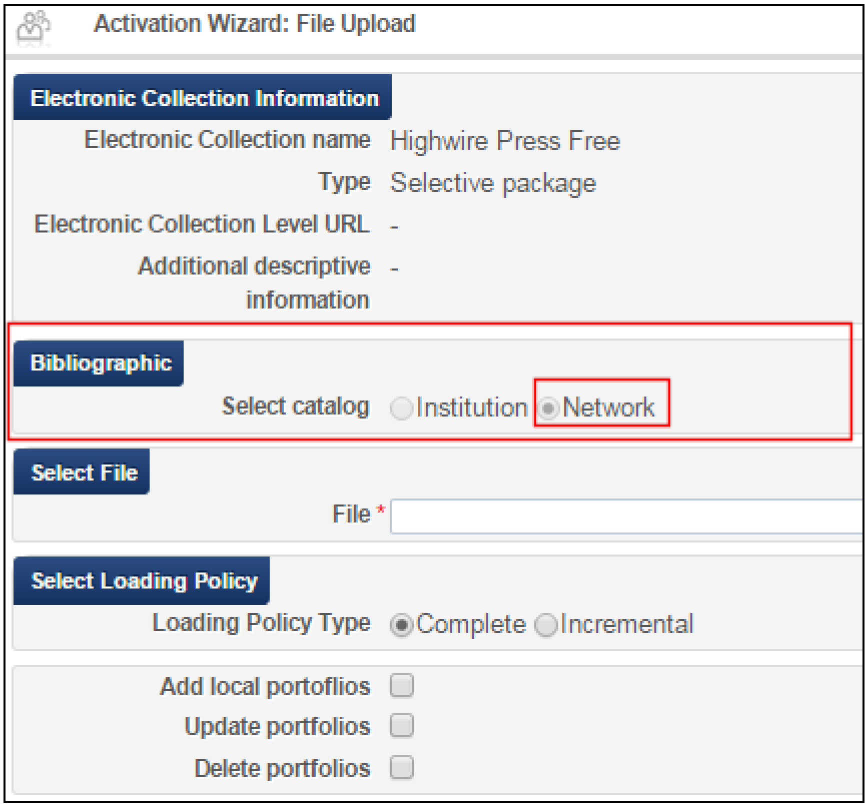


Figure 85 - Activation Wizard: File Upload Page

When the `central_record_management` parameter is set to `false`, the **Select catalog** option can be set to either **Institution** or **Network** providing the option to store bibliographic records in either location. When **Institution** is selected, the Portfolio Loader will work as it did prior to this release.

Step-by-Step Instructions

The following roles can work with the Alma Portfolio Loader:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)

To view the new capability for the Alma Portfolio Loader (when the central_record_management parameter is set to true):

1. Complete a repository search to locate the electronic collection to which you want to load portfolios.
2. From the repository search results, click the **Edit Service** link for the electronic collection to which you want to load portfolios.

3 Select the **Portfolios** tab and click **Load Portfolios**. The Activation Wizard: File Upload page appears displaying the new **Bibliographic** section that contains the **Select catalog** options of **Institution** and **Network** with **Network** selected as the default and not changeable.

When portfolios are imported locally using the Alma Portfolio Loader (and the `central_record_management` parameter is set to `true`), the system checks for matching bibliographic records in the Network Zone and processes the results in the following manner:

- When no bibliographic record match is found in the Network Zone, a new bibliographic record is added to the Network Zone to which the loaded portfolio is linked.
- When a single bibliographic record match is found in the Network Zone, a link to that matching bibliographic record is created.
- When multiple bibliographic matches are found in the Network Zone, nothing is done (manual handling may be required).

4 Complete the remainder of the wizard for loading portfolios as you normally would.

Linking Local Inventory to Bibliographic Records in the Network Zone or the Community Zone

Description

With the July release, options are being provided for linking local portfolios and electronic collections to Network Zone or Community Zone bibliographic records.

Step-by-Step Instructions

The following role can work with linking portfolios and electronic collections to the Network Zone or the Community Zone:

- Electronic Inventory Operator

To link local portfolios to the Network Zone or the Community Zone when creating local portfolios:

1 Click **Add Local Portfolio** (**Resource Management > Create Inventory**). The New Portfolio page appears.

2 Select **Create new title** or **Use existing title** for the **Creation type**.

- When you select **Create new title**, the **Placement of new record** options appear enabling you to select **Network** or **Institution** for the placement/linking of the bibliographic record for your portfolio.

If your institution has configured `central_record_management` to be `true` (refer to Central Cataloging Enhancements on page 75 for more information), the Placement of new record options do not appear on the New Portfolio page since choosing central record management would indicate that you want your bibliographic records managed only in the Network Zone and not the Institution Zone.

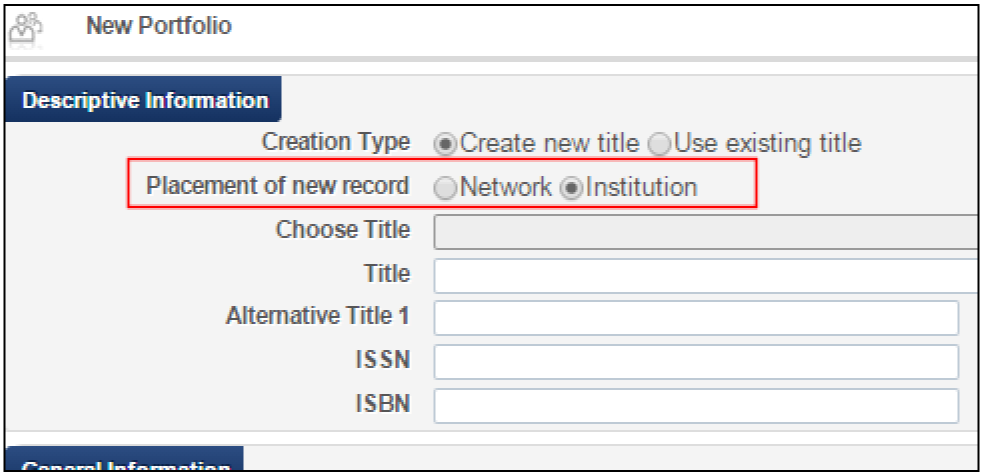


Figure 86 - New Portfolio Page Create New Title

- When you select **Use existing title** (see below), the **Placement of new record** options dynamically are removed from the page. Instead, when you browse to choose a title (bibliographic record to link to), the search options provide access to the bibliographic records in the Network tab and the Community tab. Previously, the system only provided browsing of the Institution Zone records.

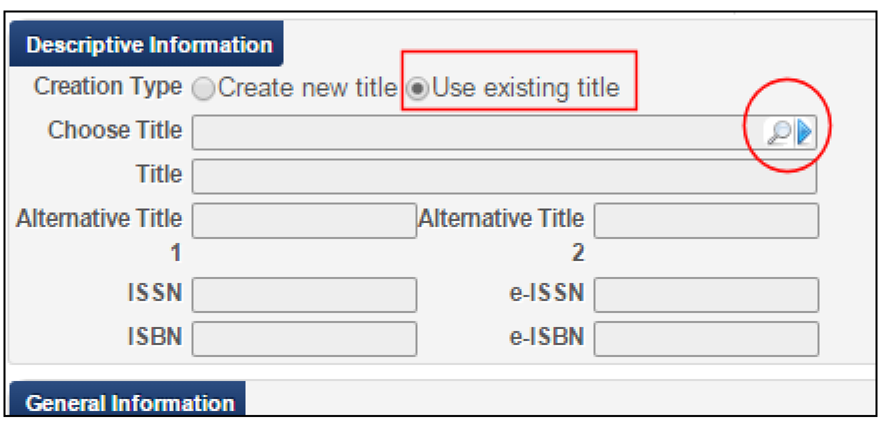


Figure 87 - New Portfolio Page Use Existing Title

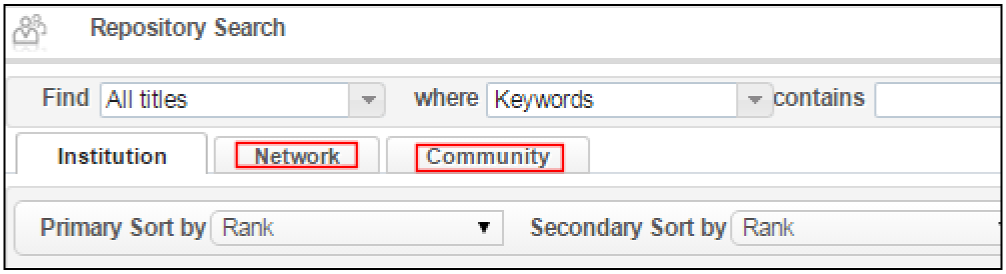


Figure 88 – Browse Network Tab and Community Tab for the Bibliographic Record to Which You Want to Link

To link electronic collections to the Network Zone or the Community Zone:

1 Complete a search for the electronic collection that you want to link to a Network Zone or Community Zone bibliographic record.

2 From the search results, click the **Edit** link for the electronic collection that you want to link to a Network Zone or Community Zone bibliographic record. The Electronic Collection Editor page appears.

3 Select the **Additional Information** tab.

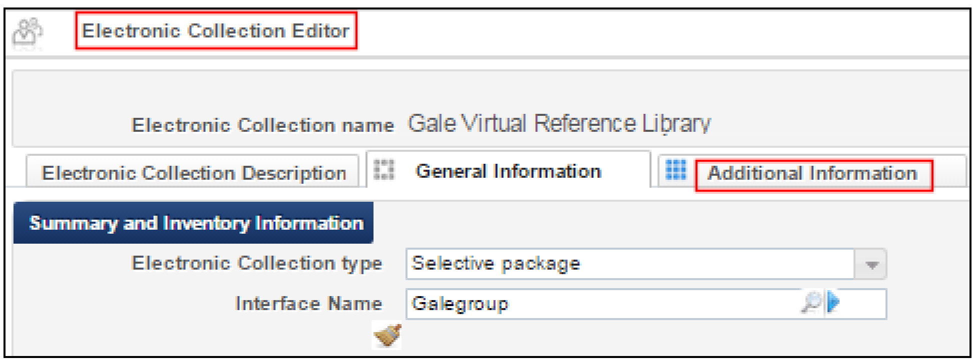


Figure 89 - Additional Information Tab

4 Browse the **Additional descriptive information** parameter to locate the Network Zone or Community Zone bibliographic record to which you want to link your electronic collection.

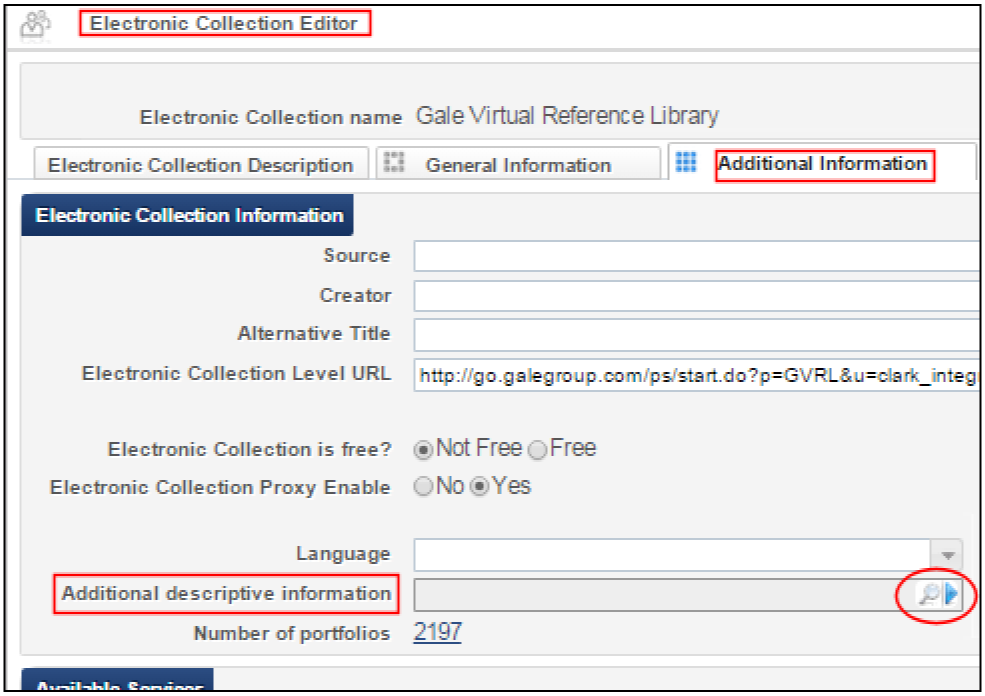


Figure 90 - Browse Additional Descriptive Information

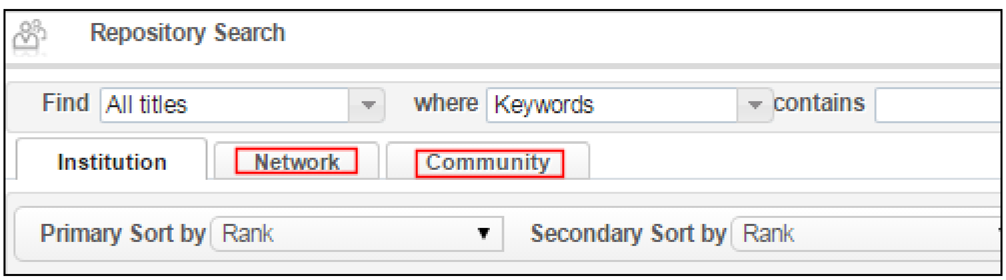


Figure 91 - Network Tab and Community Tab Options

5 From the search results, select the bibliographic record to which you want to link and click **Select**.

6 Complete the remainder of any changes that you have in the Electronic Collection Editor as you normally would.

To link electronic collections to the Network Zone or the Community Zone from the Activation Wizard:

1 Click **Manage Electronic Resource Activation** (**Resource Management > Manage Inventory**) to locate the electronic collection that you want to activate. The **Electronic Resource Activation Task List** page appears.

2 From the task list, select **Actions > Activate** for the electronic collection you want to activate. The **Activation Wizard: Electronic Collection and Services Setup** page appears.

3 Browse the **Additional descriptive information** parameter to locate the Network Zone or Community Zone bibliographic record to which you want to link your electronic collection.

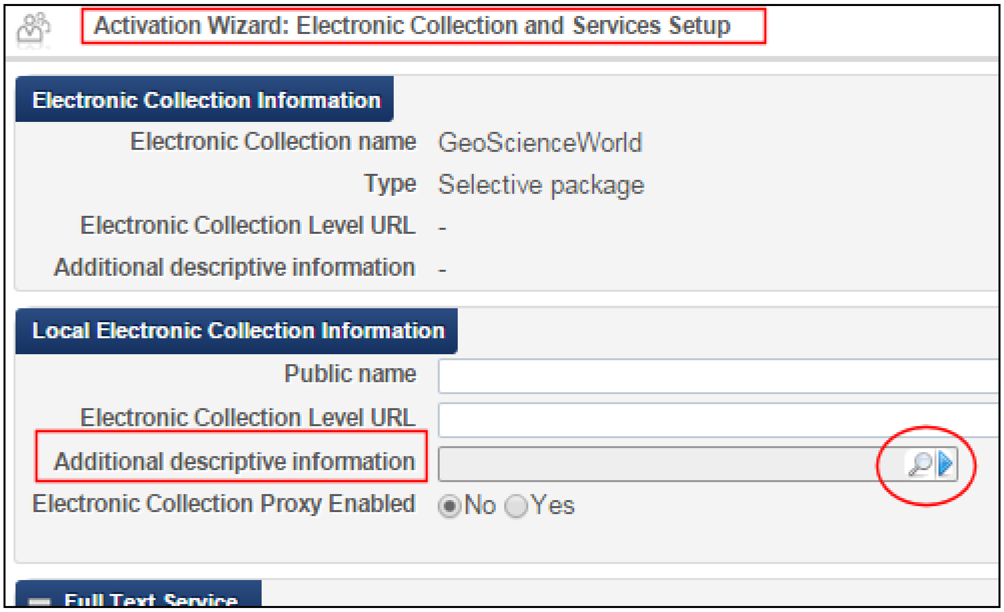


Figure 92 - Browse Additional Descriptive Information in the Activation Wizard

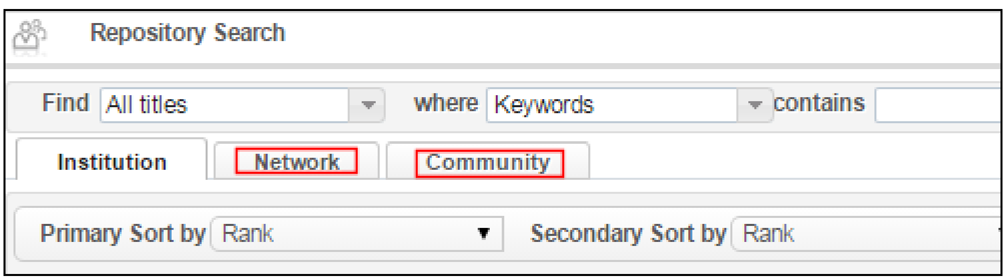


Figure 93 - Network Tab and Community Tab Options

4 From the search results, select the bibliographic record to which you want to link and click **Select**.

5 Complete the remainder of the Activation Wizard as you normally would.

Relinking Holdings to the Network Zone or the Community Zone

Description

The holdings relinking capability is being expanded with the July release to provide the capability to relink to bibliographic records in the Network Zone or the Community Zone.

Step-by-Step Instructions

The following roles can relink holdings records:

- Cataloger
- Catalog Administrator

To relink holdings records to bibliographic records in the Network Zone or the Community Zone:

1 Complete a **Physical titles** search in the Institution tab from the repository search (**Resource Management > Search and Sets > Repository Search**).

2 For the title that you want to relink, click the **Holdings** link.

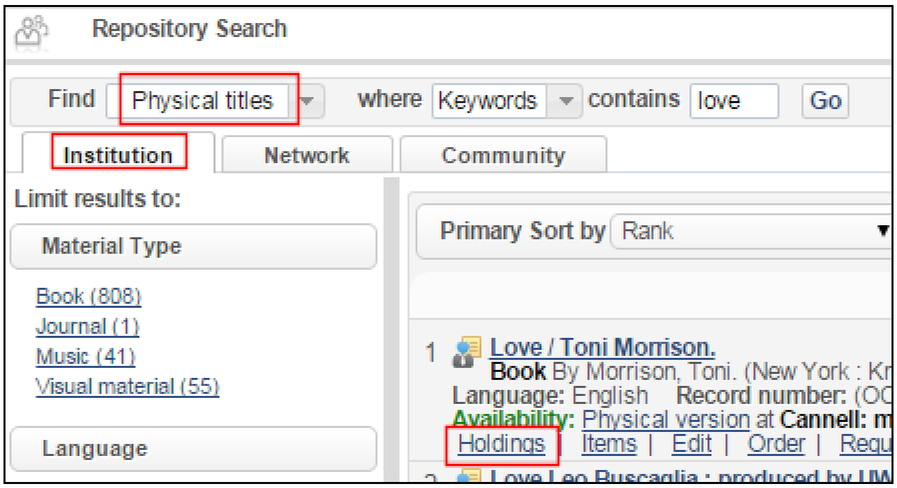


Figure 94 - Holdings Link

The MARC Record Simple View page appears.

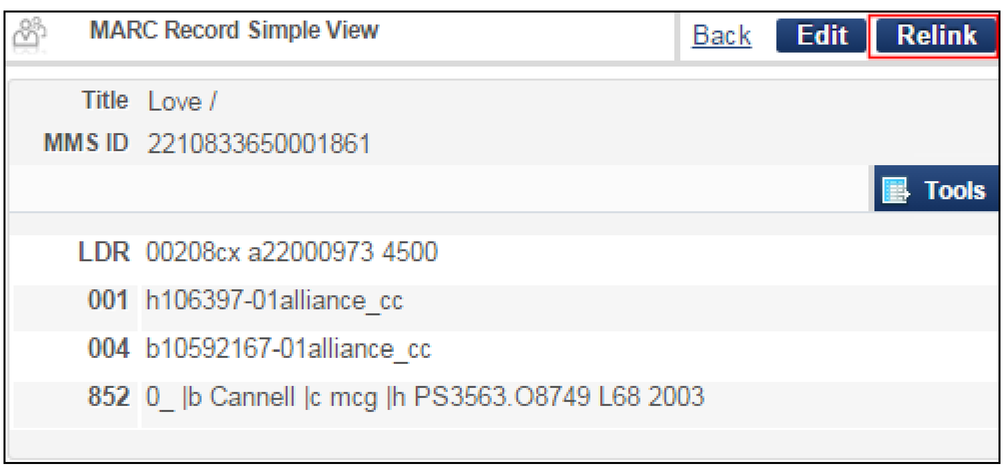


Figure 95 - Relink

3 Click **Relink**. The MD Editor opens with a search panel enabling you to locate a bibliographic record in the Network Zone or Community Zone in addition to the Institution Zone to which you can relink.

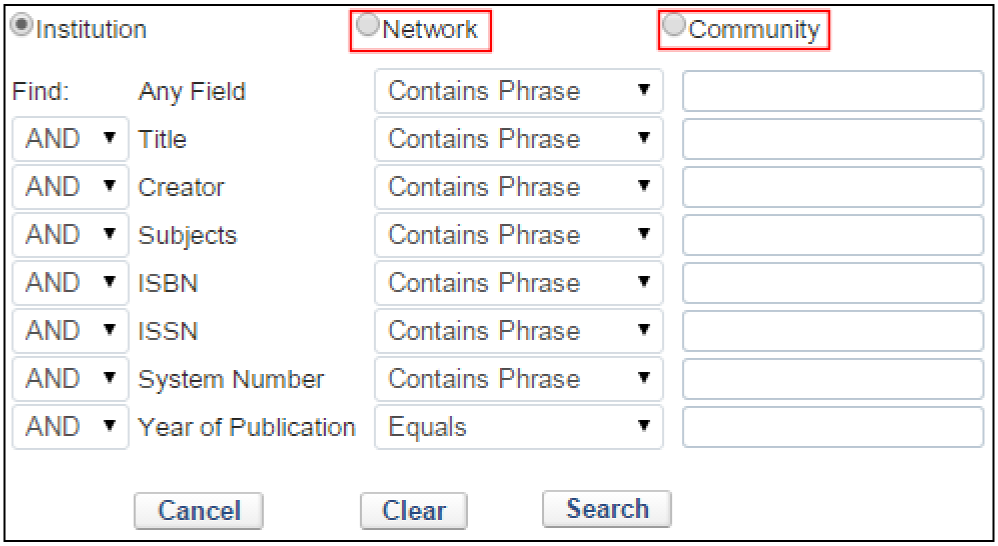


Figure 96 - MD Editor Relink Search Panel

4 Select **Network** or **Community**, enter search criteria for a bibliographic record to which you want to relink, and click **Search**. The search results appear in the MD Editor from which you can identify the bibliographic record to which you want to relink.

Figure 97 - Relink Search Results

5 Click **Relink** for the bibliographic record to which you want to link in the Network Zone or Community Zone (depending on which zone you selected for your search). The record to which you did a **Relink** opens in the MD Editor.

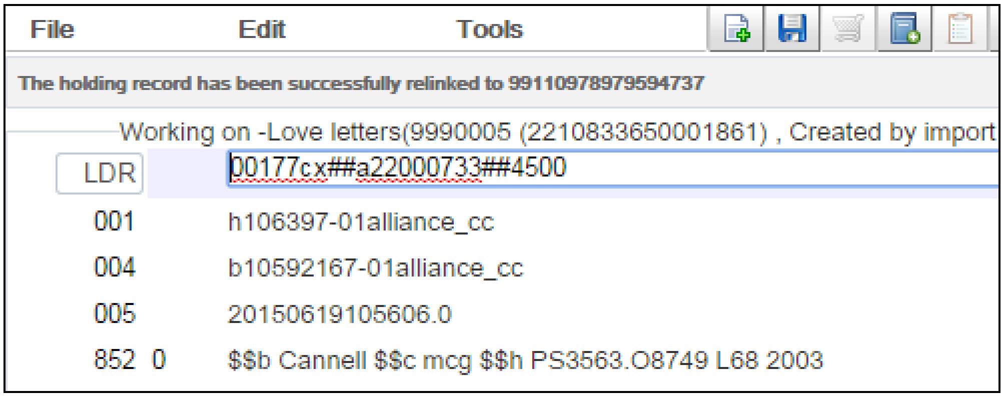


Figure 98 - Relinked Record Opens in the MD Editor

6 Click **Save**.

Other Collaborative Network Enhancements

- The mapping table CustomerParameters (**Other Settings** link on all functional area Configuration Menu pages) can now be managed by the Network Zone administrator and the configurations can be distributed to all members of the collaborative network.

Analytics

The following Analytics enhancements were made for the July 2015 release of Alma**:**

- The Create Date field in the Bibliographic Details folder (all subject areas) was renamed **Creation Date**.
- The User Name field in the Requester folder (Requests subject area) was renamed **Primary Identifier**.
- Under Fines and Fees, the Unit Owner folder was renamed **Owning Library**. Similarly, all fields containing the label Unit were renamed **Owning Library**. For example, the Unit Name field was renamed **Owning Library Name**.

Alma Infrastructure

The following Alma infrastructure enhancements were made in the July 2015 release of Alma**.**

Enhanced Support for SAML Logout

Description

Alma enhanced its implementation of SAML single logout from an external system (see the May release notes for the initial implementation of this feature). Now, when you log out of Alma, Alma requests the IDP to log you out of the external system.

In a typical implementation, you are automatically logged out of the external system. Alternatively, the external system can present you with the option to log out from it (and may offer you to log out of additional systems).

If you already added support for SAML single logout (see the May release notes), this feature does not requires any additional implementation; however, note that the **IDP Logout URL** field in the Actions tab of the SAML profile is now ignored. If you do not implement SAML single logout, the **IDP Logout URL** field continues to operate as before.

Note: Before configuring SAML single logout, ensure that Ex Libris Support has configured the required support for this feature.

Other Alma Infrastructure Updates

- Alma has improved searching using characters with diacritics, as well as returning characters with diacritics when you search using standard English characters (for example, a search for “u” matches “u”, “ü”, and so forth), in the following areas:
  - The persistent search box, when searching for requests
  - The Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**)
  - The Patron Services page in the **Loans** tab (**Fulfillment > Checkout/Checkin > Manage Patron Services**; enter a patron, click **Go**, and select **All** in the **Loan Display field**) and the **Requests** tab.
  - The Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**)

- The Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**)

Note: On the Resource Sharing Lending Requests Task List and Resource Sharing Borrowing Requests pages, searching in the **Notes** field matches special characters only in notes created starting with this release. Searching in any other field matches special characters in fields created before or after this release.

Alma APIs

For the July 2015 release, the following APIs were **added**:

- GET resource sharing borrowing request API. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/users.
- Search and GET APIs for the management of licenses. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/acq.

The following APIs were **changed**:

- An indication of whether the patron has pending loans or fines/fees was added to the GET User API. This information is especially important in determining whether deletion of particular patron is possible. In addition, a new field, **Fine Owner**, was added to the GET Fees API. For detailed information, see https://developers.exlibrisgroup.com/alma/apis/users.
- The GET Vendor API can now retrieve a list of PO lines and invoices being handled by the vendor:
  - `GET /acq/vendors/[vendorCode]/po-lines`
  - `GET /acq/vendors/[vendorCode]/invoices`
- The **Fund Type** field was added to the GET Funds API.
- The following changes were made to the GET Collection API:
  - Added a new parameter that determines how many levels of sub-collections are retrieved.
  - Bibs for a single collection are retrieved by `GET /bibs/collections{collection ID}/bib`
  - `rest_collection_bib.xsd` now includes the following fields: name, author, description, and collection thumbnail.

  For more information, see https://developers.exlibrisgroup.com/alma/apis/bibs.
- The following GET loans and requests APIs are now available under `/users`, `/bibs`, and `/bibs/{ID}/holdings{ID}/items{ID}`:
  - `GET .../loans`
  - `GET .../loans{loan ID}`
  - `GET .../requests`
  - `GET .../requests{req ID}`

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 resource sharing renewal requests are controlled by a partner's workflow profile, changing the due date using the Change Due Date option is possible even if the workflow profile does not allow this option.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- In the Course Reserves subject area in Analytics, the **Reading List Owner** field in the **Reading List** dimension does not present updated values for changes performed as of the July release. This issue will be fixed in an upcoming release.
- The **Import** button in various code tables in Alma is currently not functional. This issue will be fixed in a future Alma release.