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About the Alma Release Notes

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

These release notes include:

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

Alma March 2015 Release Highlights

Acquisitions

- New License History Tab and Other License-Related Enhancements

Several updates have been made to license information in Alma to facilitate the license negotiation lifecycle, ease the purchasing process, and obviate the need for constant communication with vendors regarding licenses.

- Improvements to Claims for Continuous Orders

Previously, when working with continuous orders such as journal subscriptions, the PO line was automatically removed from Claim status when one of the issues was received, even if other issues of the journal were not yet received. The PO line's status could only be restored manually to Claim in such cases. Now, as part of prediction pattern support, the PO line can be restored to Claim status from the Receiving Items List page if additional issues have not yet been received.

- Search Functionality Added for Reporting Codes

It is now possible to organize PO lines using the Reporting Code facet. In addition, searching capabilities have been added for reporting codes to simplify any related acquisition activity.

Resource Management

- Enhanced Visibility for Related Record Inventory

Prior to this new feature, Alma retrieved and displayed the holdings and items of the host record (which is indicated by the MARC 773 and 774 fields) only if the constituent record had no holdings and items. Alma has now been enhanced to retrieve and display host information even when the constituent record contains holdings or items.

- Dynamic URL for Electronic Collections

This great new option allows you to create sophisticated dynamic URLs for local electronic collections and portfolios. Instead of managing static links for local electronic collections/portfolios, you can now use the dynamic link URL syntax to construct URLs at different levels, including the option to embed OpenURL metadata information dynamically. In addition, the Dynamic URL can be used to override linking provided by the community knowledge base.

- **Additional Fields in the Authority Metadata Profile**

According to the Library of Congress standard, the MARC 21 Authority profile now supports many additional fields, including the 09X local call number fields and 9XX local fields. Search indexes have been added for the new 09X and 9XX fields.

Resource Sharing

- **Support of Multiple Record Identifiers for Lending Side Broker Integration**

New functionality enables resource sharing broker systems to use NCIP for placing lending side requests using additional record identifiers, such as ISBN, ISSN, and the Alma record ID. Additional broker systems may be integrated with Alma on the lender side, using the additional record identifiers as points of integration.

- **Printing a Shipping Slip at Shipping Time**

The lender can now print a shipping slip at shipping time. The shipping slip may be used by the borrower to streamline the receiving process with information that is specific to the item that has been shipped.

- **Viewing Extended Request Information in the Requests Task List**

Staff processing borrowing or lending requests will now be able to see expanded request information without having to open the request using the Edit button.

- **Rules for Maximum Allowed Renewals of Lending Requests**

Lenders can now automatically control the maximum time that shipped out items due dates may be extended.

- **Withholding Patron Email Notification When Receiving Items**

With this new feature, operators will be able to prevent a notification from being sent to the patron when an item that has been requested for borrowing is received. This is particularly useful when the Receive action is used to register the fact that an item has already been sent directly to the patron, so that no additional notice is required.

Collaborative Networks and Multicampus Institutions

- **Shared Vendor Information**

With this great new feature, global vendor information can be shared between the Network Zone (NZ) of a consortium and member institutions. Only global attributes are distributed from the NZ. Local attributes (such as vendor account, EDI information, access provider, and vendor interface) are not distributed and must be configured on the local level. Because

the vendor account, access provider, and vendor interface are not distributed to member institutions, the vendor is inactive in the member institution until these attributes are added and the vendor is activated.

Analytics

- Alma Analytics Community Folder New Structure

A new organizational structure and usage methodology has been implemented for the reports in the community folder. This methodology allows libraries to more efficiently contribute, locate, and share folders with each other. The structure represents business use cases from libraries.

Alma RESTful APIs

- The following RESTful APIs have been added:
 - An API for retrieving invoices
 - An API to create remote digital representations
 - An API to link to a Network Zone bibliographic record

Data Services

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

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma CZ during the period 01-February-2015 through 22-February-2015:

- Digitalia eBooks 2014
- eDuke 2008 Books
- eDuke 2009 Books
- eDuke 2010 Books
- eDuke 2011 Books
- eDuke 2012 Books
- eDuke 2013 Books
- eDuke 2014 Books
- eDuke 2015 Books
- eDuke Pre-2008 Books
- iG Publishing: A & C Black Publishers Ltd.
- iG Publishing: ACP Medicine
- iG Publishing: ACS Surgery
- iG Publishing: Alpha Science International Ltd.
- iG Publishing: American College of Physicians
- iG Publishing: American Library Association
- iG Publishing: American Management Association
- iG Publishing: American Psychiatric Publishing, Inc.
- iG Publishing: American Society for Training and Development
- iG Publishing: American Society of Health-System Pharmacists, Inc.
- iG Publishing: American Society of Heating, Refrigerating and Air-Conditioning Engineers, Inc.

- iG Publishing: Amsterdam University Press
- iG Publishing: Anmol Publications
- iG Publishing: Ashgate Publishing Ltd.
- iG Publishing: ASM International
- iG Publishing: Bentham Science Publishers Ltd.
- iG Publishing: Berghahn Books
- iG Publishing: Berrett-Koehler Publishers, Inc.
- iG Publishing: British Computer Society
- iG Publishing: British Standards Institution
- iG Publishing: Brookings Institution Press
- iG Publishing: Burma Rare Book Collection
- iG Publishing: Business Expert Press
- iG Publishing: Cambridge International Science Publishing Ltd.
- iG Publishing: Clinical Publishing
- iG Publishing: Columbia University Press
- iG Publishing: Edinburgh University Press
- iG Publishing: Enrich Professional Publishing
- iG Publishing: F.A. Davis Company
- iG Publishing: Global Professional Publishing Ltd.
- iG Publishing: GMB Publishing
- iG Publishing: Grey House Publishing, Inc.
- iG Publishing: Hart Publishing Ltd.
- iG Publishing: Hindustan Book Agency
- iG Publishing: Institute of Southeast Asian Studies
- iG Publishing: International Engineering Consortium
- iG Publishing: International Monetary Fund
- iG Publishing: International Society of Automation eBooks
- iG Publishing: Intersentia Publishing Ltd.
- iG Publishing: iSmithers Rapra Publishing

- iG Publishing: J. J. Keller & Associates, Inc.
- iG Publishing: J. Ross Publishing, Inc.
- iG Publishing: Kogan Page Ltd.
- iG Publishing: Liverpool University Press
- iG Publishing: M.E. Sharpe, Inc.
- iG Publishing: Manchester University Press
- iG Publishing: Maney Publishing
- iG Publishing: Math Solutions Publications
- iG Publishing: Momentum Press
- iG Publishing: Morgan & Claypool Publisher
- iG Publishing: Multi-Science Journal
- iG Publishing: Multi-Science Publishing
- iG Publishing: National Book Network
- iG Publishing: No Starch Press, Inc.
- iG Publishing: Nordic Institute of Asian Studies
- iG Publishing: Now Publishers, Inc.
- iG Publishing: Nursing Knowledge International
- iG Publishing: Oncology Nursing Society
- iG Publishing: Paths International Ltd.
- iG Publishing: Pearson Education Taiwan
- iG Publishing: PennWell Corporation
- iG Publishing: People's Medical Publishing House - USA, Ltd.
- iG Publishing: Plunkett Research, Ltd.
- iG Publishing: Policy Press
- iG Publishing: Princeton University Press
- iG Publishing: Quintessence Publishing
- iG Publishing: Radcliffe Publishing
- iG Publishing: Reaktion Books Ltd.
- iG Publishing: Royal College of Psychiatrists

- iG Publishing: Royal Institute of British Architects
- iG Publishing: Sellier European Law Publishers
- iG Publishing: Showwe Information
- iG Publishing: Springer Publishing Company
- iG Publishing: Texas A&M University Press
- iG Publishing: The Rowman & Littlefield Publishing Group
- iG Publishing: Thorogood Publishing
- iG Publishing: United Nations University Press
- iG Publishing: University of California Press
- iG Publishing: University of Chicago Press
- iG Publishing: University of Hawaii Press
- iG Publishing: University of Michigan Press
- iG Publishing: Usborne Publishing
- iG Publishing: WIT Press
- iG Publishing: World Scientific Publishing Co. Pte. Ltd.
- iG Publishing: XPL
- iG Publishing: XPL Journal
- Knovel Adhesives, Coatings, Sealants & Inks Academic
- Knovel Aerospace Radar Technology Academic
- Knovel Biochemistry, Biology & Biotechnology Academic
- Knovel Ceramics & Ceramic Engineering Academic
- Knovel Chemistry & Chemical Engineering Academic
- Knovel Civil Engineering & Construction Materials Academic
- Knovel Computer Hardware Engineering Academic
- Knovel Earth Sciences Academic
- Knovel Electrical & Power Engineering Academic
- Knovel Electronics & Semiconductors Academic
- Knovel Engineering Management & Leadership Academic
- Knovel Environment & Environmental Engineering Academic

- Knovel Fire Protection Engineering & Emergency Response Academic
- Knovel Food Science Academic
- Knovel General Engineering & Project Administration Academic
- Knovel Industrial Engineering & Operations Management Academic
- Knovel Manufacturing Engineering Academic
- Knovel Mechanics & Mechanical Engineering Academic
- Knovel Metals & Metallurgy Academic
- Knovel Mining Engineering and Extractive Metallurgy Academic
- Knovel Nanotechnology Academic
- Knovel Oil & Gas Engineering Academic
- Knovel Optics and Photonics Academic
- Knovel Pharmaceuticals, Cosmetics & Toiletries Academic
- Knovel Plastics & Rubber Academic
- Knovel Premium Titles Academic
- Knovel Process Design Control and Automation Academic
- Knovel Safety & Industrial Hygiene Academic
- Knovel Sustainable Energy and Development Academic
- Knovel Textiles Academic
- Knovel Transportation Engineering Academic
- Knovel Welding Engineering & Materials Joining Academic
- Ovid Lippincott Williams & Wilkins Nursing Health Professions Archive 2013
- Oxford Music Online
- Springer Link Books Behavioral Science 2015
- Springer Link Books Biomedical And Life Sciences 2015
- Springer Link Books Business And Economics 2015
- Springer Link Books Business And Economics German 2015
- Springer Link Books Chemistry And Material Science 2015
- Springer Link Books Computer Science And Engineering German 2015
- Springer Link Books Computer Science Without Lecture Notes 2015

- Springer Link Books Earth And Environmental Science 2015
- Springer Link Books Energy 2015
- Springer Link Books Engineering 2015
- Springer Link Books Humanities And Social Sciences German 2015
- Springer Link Books Humanities Social Sciences And Law 2015
- Springer Link Books Lecture Notes In Computer Science 2015
- Springer Link Books Lecture Notes In Mathematics 2015
- Springer Link Books Lecture Notes In Physics 2015
- Springer Link Books Life Science And Basic Disciplines German 2015
- Springer Link Books Mathematics and Statistics Archive
- Springer Link Books Mathematics And Statistics Without Lecture Notes 2015
- Springer Link Books Medicine 2015
- Springer Link Books Medicine Dutch 2015
- Springer Link Books Medicine German 2015
- Springer Link Books Physics And Astronomy Without Lecture Notes 2015
- Springer Link Books Professional And Applied Computing 2015
- Springer Link Books Psychology German 2015
- Springer Link Books Springer Protocols 2015
- Walter De Gruyter: Open Access eBooks
- Walter De Gruyter: Open Access Journals

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

Alma Show Me How and Videos

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

Alma Show Me How – March

Description

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

Technical Instructions

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

To access Show Me How:

- 1 From the Alma home page, click the **Show Me How** button.
The How Can We Assist You? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.

For the March release, the following Show Me How scenario is available:

- Import: Resolve Multiple Match by Inventory Type

The following pop-ups are also available:

- **New: Search for PO Line by Reporting Code** (Acquisitions > Purchase Order Lines > Review)
- **New: Filter PO Line Search by Reporting Code** (Acquisitions > Purchase Order Lines > Review)
- **New: Advanced Search for PO Line by Reporting Code** (Acquisitions > Advanced Tools > Manage Sets > Add Set (itemized or logical), give the set any name, and click **Add Contents to Set** (for itemized sets) or **Next** (for logical sets))
- **New: Filter Licenses by Review Status** (Acquisitions > Acquisitions Infrastructure > Licenses)

- **New: License Status Configuration** (Acquisitions > Acquisitions Infrastructure > Licenses, click any license in the list to view details)

Alma Videos – March

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

- Bibliographic Import: Resolve Multiple Match by Inventory Type
- Shared Vendors in the Network Zone
- New License History Tab and Other License-Related Enhancements
- Search Functionality Added for Reporting Codes
- Enhanced Visibility for Related Record Inventory
- Dynamic URL for Electronic Collections

Particular Issues to Note

The following issues should be noted:

- As reported in the February release, the following electronic collection type values are no longer available in Alma:
 - A&I database (to be deprecated)
 - Full text database (to be deprecated)
 - Partial full text database (to be deprecated)
 - Other (to be deprecated)

Note that electronic collections that were previously defined with these values will remain as is in the system. You are not required to take any action regarding these electronic collections.

- The following enhancement that was reported in the Alma February release, has been removed for the March release:

The loan status in the Primo My Account tab (for a single loan view) now includes the maximum date until which the loan can be renewed (when the request has view = full). The displayed format is: **[loan status/process]. Maximum renewal date is [date]**

The enhancement was removed following reported issues with having this option as a fixed configuration, as well as further analysis by the Ex Libris development team. This functionality will be re-evaluated and analyzed for one of the upcoming Alma releases.

Acquisitions

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

New License History Tab and Other License-Related Enhancements

Description

The March release includes the following license-related enhancements:

- The ability to define your own license statuses, which facilitates the license negotiation lifecycle
- The ability to track license history, which simplifies the purchasing process without having to communicate with vendors on a regular basis, saving time and effort
- The ability to filter the licenses by License and License Review status, enhancing your ability to review your licenses

The following additions have been made for the March release:

- The **Review Status** column and the **Review Status** filter have been added to the Licenses and Amendment page (**Acquisitions > Acquisitions Infrastructure > Licenses**). For configuration instructions, see the Technical Instructions section below.

	Name	License code	License type	Licensor Code	Status	Review Status
1	AccessScience License	13149	License	-	Active	Accepted
2	AccuNet/AP Multimedia Archiving License	13150	License	-	Active	Accepted
3	Acland License	13326	License	-	Active	Accepted
4	ACLS History E-Book Project NERL License	13151	License	-	Active	Accepted
5	ACM Digital Library License	13155	License	ACM	Active	Accepted
6	Acta Sanctorum License	13152	License	-	Active	Accepted
7	Adam Matthew Digital Online License Agreement	13276	License	MATTHEW	Active	Accepted
8	Ad Fontes License	13153	License	-	Active	Accepted
9	Adoption and Fostering License for Institutional Subscribers	13303	License	-	Active	Accepted
10	African affairs License	13050	License	-	Active	Accepted

Figure 1 – Review Status

- On the License Details page (**Acquisitions > Acquisitions Infrastructure > Licenses > Add License**):
 - You can now add free text to the **Signed by** field. Until now, only an existing user could be added.

Note: The auto complete feature is still available.

- The **Second party's Signed by** and **Second party's Signed on** fields have been added. These fields contain the name of a secondary signer and the date on which the signer was added.

License Details

License American Library Association Creation date 06/03

Summary License Terms Inventory Amendments History

Name * American Library Association License code * ALA

License status Active Licensors mala

Signed by Tom Lewin Signed on 01/28/2011

Second party's Signed by Second party's Signed on

Start date * 02/01/2011 End date

License location Librarian's Office License review status Accepted

License URI Licensing agent

Figure 2 – License Details

- The license **History** tab has been added (**Acquisitions > Acquisitions Infrastructure > Licenses > Edit**).

History

License ACM Digital Library Creation date 08/27/2013

Summary License Terms Inventory Amendments History

Report type License changes License terms changes

Date	Operator	Field name	Old value	New value
1 02/05/2015 02:50:23 CST	Support, Ex Libris	License Terms	-	Print copy(PERMITTED)

Figure 3 – License History

- Select **License changes** to display the changes to licenses.
- Select **License terms changes** to display the changes to the terms of licenses.

- Select **Negotiation changes** to display changes to license negotiations (relevant for licenses in the context of a collaborative network or consortium).

Note: Only after a change is made to a license is data added to the history tab; therefore, the first time a license is created no history data is displayed for it.

- You can now configure the license review status.

Technical Instructions

The following roles can configure the license review status:

- Acquisitions Administrator
- General System Administrator

To configure the license review status:

- 1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu > License**), click **License Review Status**. The following is displayed.

Code Table
Cancel **Customize**

You are configuring: Boston University

Table Information

Sub System	ACQUISITION	Table Name	License Review Statuses
Updated By	-	Updated on	-
Table Description	List of License Review Status		

List of License Review Status

Enabled	Display	Order	Code	Description	Default Value	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	▼	PENDING	Pending	<input checked="" type="radio"/>	-		Delete
2	<input checked="" type="checkbox"/>	▲	ACCEPTED	Accepted	<input type="radio"/>	-		Delete
3	<input checked="" type="checkbox"/>	▲	REJECTED	Rejected	<input type="radio"/>	-		Delete
4	<input checked="" type="checkbox"/>	▲	INREVIEW	In review	<input type="radio"/>	-		Delete

Create a New Code Table Row

Quick Add

Code	Description	Default Value	
<input type="text"/>	<input type="text"/>	No	Add Row

Cancel **Customize**

Figure 4 – License Review Status Configuration

- 2 Add and edit the license review statuses.
- 3 Click **Customize**.

Your changes are displayed in the **License review status** field.

License - Creation date 02/04/2015

Summary License Terms Inventory

Name *	<input type="text"/>	License code *	<input type="text"/>
License status	Draft	Licensor	<input type="text"/>
Signed by	<input type="text"/>	Signed on	<input type="text"/>
Second party's Signed by	<input type="text"/>	Second party's Signed on	<input type="text"/>
Start date *	02/04/2015	End date	<input type="text"/>
License location	Finance Office	License review status	Pending
License URI	<input type="text"/>	Licensing agent	Accepted
			In review
			Pending
			Rejected

Figure 5 – License Review Status

Improvements to Claims for Continuous Orders

Description

When an ordered item is not received by an institution within a certain number of days (by default, 90 days), the PO line is put in Claim status and a letter is sent to the vendor requesting the item (provided vendor notification is configured). When the item is received by the institution, the PO line is removed from its Claim status.

Until now, when working with continuous orders such as journal subscriptions, the PO line was automatically removed from Claim status when one of the issues was received, even if other issues of the journal were not yet received. The PO line's status could only be restored manually to Claim in such cases. Now, as part of prediction pattern support, the PO line can be restored to Claim status from the Receiving Items List page if additional issues have not yet been received. This streamlines the receiving workflow and facilitates the claiming process, replacing the current practice that requires you to manually create a reminder.

Technical Instructions

The following role can access this feature:

- Receiving Operator

To access this feature:

- 1 Receive items for a PO line of a continuous order. If the expected receiving date of an item has passed and the item has not been received and the PO line is not already in Claim, the **Claim Missing Items** button is displayed on the Receiving Items List page.

The screenshot shows the 'Received Items List' interface. At the top, there is a description: '20022012_104139 Barnes & Noble Library of Essential Reading .. Barnes & Noble.. 2005.. 978076'. Below this, the status is 'Waiting for Renewal (2012-03-18)' and the order line type is 'Print Journal - Subscription'. The 'Bibliographic Information' section includes fields for Title, Identifier (9780760765455), Vendor's Title Number, Publisher (Barnes & Noble), Frequency, Language, Identifier Type (ISBN), Publication Place ([S.1]), and Publication Date (2005). The 'PO line Items' section shows a receiving note, sort routine (Library/Location), and receiving status (All). Below this, there are two buttons: 'Receive New Items' and 'Claim Missing Items', with the latter highlighted by a red box. A table of items follows, with columns for Library, Location, Temp Loc, Date Received, Modified, Call Number, Barcode, and Des. The table contains three rows of data.

	Library	Location	Temp Loc	Date Received	Modified	Call Number	Barcode	Des
1	<input type="checkbox"/> Main Library	General	No	-	02/08/2015	-	alma11211	-
2	<input type="checkbox"/> Main Library	General	No	-	02/08/2015	-	alma11210	-
3	<input type="checkbox"/> Main Library	General	No	-	03/18/2012	-		-

Figure 6 – Claim Missing Items

- 2 Click **Claim Missing Items** to move the PO line into Claim status.

The PO line moves to Claim status and the **Claim Missing Items** button is no longer displayed.

A letter is sent to the vendor, requesting the item (if so configured).

Searching Functionality Added for Reporting Code

Alma lets you define reporting codes that can be used for analyzing acquisitions in subsequent reporting. You can now organize PO lines using the Reporting Code facet, which uses multiple filters to classify information by reporting code. In addition, searching capabilities have been added for reporting codes to simplify any related acquisition activity.

For the March release, support for PO line reporting codes has been enhanced by the addition of the following functions:

- You can now search in the persistent search box for the reporting code.
- **Reporting code** has been added to the **In** drop-down list as part of the Find feature:

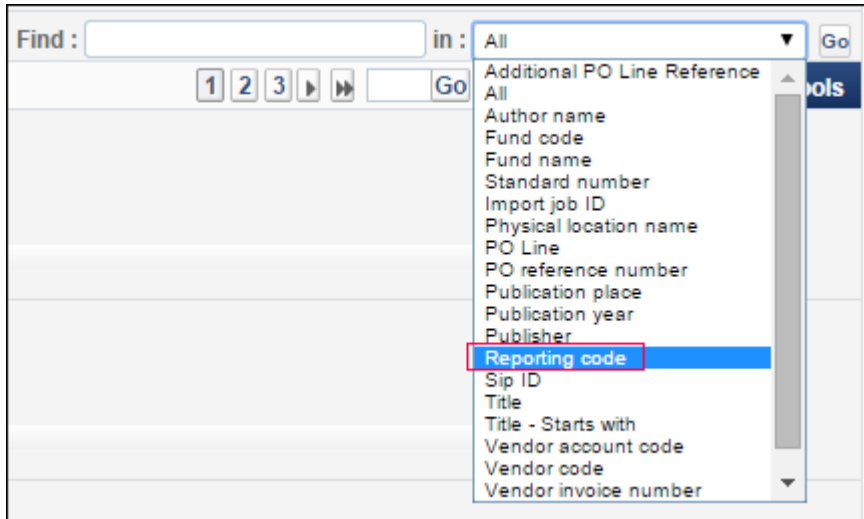


Figure 7 – Reporting Code

Note: When searching for the reporting code, both the **Code** and the **Description** fields of the reporting code are searched.

- The Reporting Code facet has been added when viewing a list of PO lines:

Purchase Order Lines in Review

Limit results to:

Alert

[Duplicate active orders \(11\)](#)
[Items already exist in the repository \(25\)](#)
[Mandatory information is missing or erroneous \(10\)](#)
[Open claims exist for this PO line \(6\)](#)
[More \(5\) ▾](#)

Purchase Type

[Electronic Book - One Time \(12\)](#)
[Electronic Journal - Subscription \(3\)](#)
[Physical - One Time \(1\)](#)
[Physical - Subscription \(8\)](#)
[More \(3\) ▾](#)

Vendor

[African studies library \(1\)](#)
[Amazon.com \(1\)](#)
[American Bar Association \(1\)](#)
[EBSCO \(1\)](#)
[More \(14\) ▾](#)

Rush

[No Rush \(104\)](#)
[Rush \(2\)](#)

Library

[Mugar \(70\)](#)
[African Studies Library \(1\)](#)
[Alumni Medical Library \(2\)](#)
[Pappas Law Library \(19\)](#)
[More \(2\) ▾](#)

Acquisition Method

[Approval Plan \(50\)](#)
[Gift \(3\)](#)
[Purchase \(19\)](#)
[Purchase at Vendor System \(28\)](#)
[Technical \(3\)](#)

Reporting Code

[Electronic Book \(2\)](#)
[Electronic Serial \(1\)](#)
[Print Serial \(9\)](#)

	Assigned to Me	Unassigned	Assigned to Others
1	<p>"Dual containment" in the Persian Gulf : the USA, Iran, and Iraq, 1991-2000 / by Alex Edwards., New York, NY : ALM Publishing, 2012. Type: Print Book - One Time Standard number: 9781137436351 (hardback : alk. paper) Order/Line: PO-179983 Copies: Mugar - boss-Stacks (1) Total price: 83.00 USD Funds: Multidisciplinary Books (100.0%) (FY-2015) Vendor/Account: Yankee Book Peddlar / Yankee Book Peddlar mybp Vendor reference ID: 400244588 Receiving note: - The bib record is part of a series/book set Edit Assign to Remove from Order Order Now Relink Change Bib Reference Cancel</p>		
2	<p>A Handbook on Contract Drafting., New York, NY: ALM Publishing, 2012. Type: Print Book - One Time Standard number: - Order/Line: o6584901 / o6584901 Copies: - Total price: 0.01 USD Funds: - Vendor/Account: Amazon.com / Amazon.com lamaz Vendor reference ID: - Expected delivery: - Receiving note: law:LAW(1) Sent Date: 08/05/2011 Items already exist in the repository Edit Assign to Remove from Order Order Now Defer Relink Change Bib Reference Cancel</p>		
3	<p>A companion to Ignatius of Loyola : life, writings, spirituality, influence / edited by Robert Aleksander Adamski S.J., New York, NY : Orbis Books, 2012. Type: Electronic Book - One Time Standard number: 900428060X (electronic bk.) Order/Line: - / - Total price: 199.00 USD Funds: Theo Ebooks-513220 (100.0%) (FY-2015) Vendor/Account: Yankee Book Peddlar / Yankee Book Peddlar mybp Vendor reference ID: 999614097 License status: - Activation status: Not Activated E-Resource The bib record is part of a series/book set Edit Assign to Start a trial Request Evaluation Order Now Relink Change Bib Reference Cancel</p>		
4	<p>American hybrid poetics : gender, mass culture, and form / Amy Moorman Robbins., New Brunswick, NJ : Transaction Publishers, 2012. Type: Print Book - One Time Standard number: 9780813564654 (hardback) Order/Line: PO-179983 Copies: Mugar - boss-Stacks (1) Total price: 24.39 USD Funds: Multidisciplinary Books (100.0%) (FY-2015) Vendor/Account: Yankee Book Peddlar / Yankee Book Peddlar mybp Vendor reference ID: 400237934 Receiving note: - The bib record is part of a series/book set Edit Assign to Remove from Order Order Now Relink Change Bib Reference Cancel</p>		
5	<p>Anarchy unbound : why self-governance works better than you think / Peter T. Leeson., New York, NY : Routledge, 2012. Type: Print Book - One Time Standard number: 9781107629707 (paperback) Order/Line: PO-17940 Copies: Mugar - boss-Stacks (1) Total price: 26.31 USD Funds: Multidisciplinary Books (100.0%) (FY-2015) Vendor/Account: Yankee Book Peddlar / Yankee Book Peddlar mybp Vendor reference ID: 400236856 Receiving note: - The bib record is part of a series/book set Edit Assign to Remove from Order Order Now Relink Change Bib Reference Cancel</p>		
6	<p>Annual Review of Law and Technology - Berkeley technology law journal. - Payment record, University of California Berkeley School of Law, 2012. Type: Print Journal - Subscription Standard number: 1086-3818 Order/Line: - / POL-210090 Copies: - Total price: 40.00 USD Funds: law print journal (100.0%) (FY-2015) Vendor/Account: EBSCO / EBSCO lebs Vendor reference ID: - Expected delivery: 12/31/2099 Renewal date: 07/01/2015 Receiving note: - Items already exist in the repository, Duplicate active orders, Previously canceled ordered resource Edit Assign to Order Now Relink Change Bib Reference Cancel Delete</p>		
7	<p>Augustine's Confessions a biography / Garry Wills., Princeton, N.J. : Princeton University Press, c2012. Type: Electronic Book - One Time Standard number: 1400838029 (electronic bk.) Order/Line: - / - Total price: 19.95 USD Funds: Theo Ebooks-513220 (100.0%) (FY-2015) Vendor/Account: Yankee Book Peddlar / Yankee Book Peddlar mybp Vendor reference ID: 999590340 License status: - Activation status: Activated E-Resource The bib record is part of a series/book set Edit Assign to Start a trial Request Evaluation Order Now Relink Change Bib Reference Cancel</p>		
8	<p>Automorphic forms and Galois representations / edited by Fred Diamond, King's College London University Press., 2014, 9781107691926, ISBN 9781107691926. Type: Print Book - One Time Standard number: 9781107691926 Order/Line: PO-184453 / POL-184453 Copies: Mugar - boss-Stacks (1) Total price: 79.90 USD Funds: Multidisciplinary Books (100.0%) (FY-2015) Vendor/Account: Yankee Book Peddlar / Yankee Book Peddlar mybp Vendor reference ID: 400244268 Receiving note: - Duplicate active orders</p>		

Figure 8 – Reporting Code Facet

- The reporting code is available in the advanced search when creating sets (Acquisitions > Advance Tools > Manage Sets > Add Set > Add Contents to Set):

Advanced Search	
Find	<input type="text"/>
Workflow	Equals ▼
Material Supplier	Equals ▼
Material Supplier Account	Contains Keywords ▼
Access Provider	Equals ▼
Acquisition Method	Equals ▼
Fund Code	Equals ▼
Fund Name	Contains Keywords ▼
License Code	Equals ▼
Rush	Equals ▼
Cancellation restriction	Equals ▼
Reporting Code	Equals ▼
PO Line Type	Equals ▼

Figure 9 – Reporting Code – Advanced Search

Other Acquisitions Enhancements

- As we notified previously, the **Use XSD format** check box has been removed from the Finance integration profile.
- When executing the Change Vendor in Order job, in order to prevent a situation of accidentally changing the vendor for a large number of orders, two new confirmation messages were added.
 - Whenever this job is executed, the following message will appear: **You are about to move PO lines from <source vendor> vendor to <target vendor> vendor: Are you sure you want to continue?**
 - If you are executing this job without specifying the PO (PO field is empty), the following message will appear: **PO was not selected. The job will work on a large amount of data and the action is irreversible: Are you sure you want to continue?**
- It is now possible to create a set of PO lines based on PO line type using the new **PO line type** drop down list that was added to the PO line advanced search.
- In the New Order import profile, it is now possible to add interested users to a PO line using either the primary ID or any unique identifier, such as email (and not only by primary ID).

- The PO line types with **(to be deprecated)** appended to them have now been removed from the **PO line type** drop-down list. For such existing PO line types, the **(to be deprecated)** now reads **(removed)**.
- The Date Received has been added to the Receive New Material page.
- A new email type, **Claim Response**, was added to all organization unit emails. When claim notification is sent to the vendor, if the organization unit (owning library) has a Claim Response email type, this email is used in the claim notification email's **From** address.

Note: If you want the claim letter to use the **From Address** in the PO Line Claim Letter code table (**Administration > General Configuration > Configuration Menu > Letter Emails**) and not the library's email address, you must remove the **Claim response** email type from the organization emails (**Administration > General Configuration > Configuration > Add a Library or Edit Library Information > Libraries**, edit the email addresses under **Contact Information**, clearing the **Claim response** email type).

Resource Management

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

Enhanced Visibility for Related Record Inventory

Description

This enhancement improves the visibility of related record inventory. Previously, Alma retrieved and displayed the inventory of the host record (which is indicated by the MARC 773 and 774 fields) only if the related record had no holdings and items. With this release, Alma has been enhanced to retrieve and display host information even when the related record contains holdings or items. This modification can be seen in the following places:

- Repository search results – Availability information for the host record now displays in the results for the related record.

Repository Search

Find where contains

Limit results to:

[Collection](#)
[Electronic title](#)
[Digital title](#)
[Physical title](#)

[Book \(2\)](#)

[English \(2\)](#)

[2014 \(2\)](#)

Primary Sort by Secondary Sort by

- 1 **[18655 Alma - HOST WITH HOLDING](#)**
Book By Author (Publisher year)
 Language: English Record number: hostholding1234
Availability: [Physical version](#) at **GRAD: grad** (1 copy, 1 available)
[Physical version](#) at **MUS: music** (1 copy, 1 available)
[Physical version](#) at **MAIN: main**
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) |
- 2 **[18655 Alma - PART OF - Local Holding and Host Holding](#)**
Book By Author (Publisher year)
 Language: English
Availability: [Physical version](#) at **MAIN: main** (1 copy, 1 available)
[Physical version](#) at **LAW: LAWRR**
[Physical version](#) at **MUS: music**
Availability of related records:
[Physical version](#) at **GRAD: grad** (1 copy, 1 available)
[Physical version](#) at **MUS: music** (1 copy, 1 available)
[Physical version](#) at **MAIN: main**
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) |

Figure 10 – Related Record with Holdings/Items (Repository Search)

- Primo Get It tab – Holdings information for both the host and discovered records display, starting with the holdings in the discovered record.

Request Options: Request Digitization Northwest Consortium		
Location	Availability	Location Map
Main Library Stacks	(1 copy, 1 available)	
Law Library Reading Room	(0 copies, 0 available)	
Music Library Stacks	(0 copies, 0 available)	
Graduate Library Stacks	(1 copy, 1 available) Related holding	
Music Library Stacks	(1 copy, 1 available) Related holding	
Main Library Stacks	(0 copies, 0 available) Related holding	

Figure 11 – Related Record with Holdings/Items (Primo Get It Tab)

- Citation tab on Edit Reading List page – Availability information for the host record now displays in the results for the related record.

Edit Reading List

Course Code: TCOM321	Section: -
Processing: Main Library Course	Instructors: Bezalion, Mitchel
Department: Reserves	

Reading List Information

Code: Piatelli - Sprint(1)
Name: Managing Diversity(1)
Owner: Abutbul, Noam
Status: Being Prepared
Due Back Date: 02/27/2015

Citations
 Notes

Alerts All
 Citation/Locate Status All

- 1

18655 Alma - HOST WITH HOLDING
Physical Book By Author (Publisher year)
Availability: Physical version at **GRAD: grad** (1 copy, 1 available)
 Physical version at **MUS: music** (1 copy, 1 available)
 Physical version at **MAIN: main**
Request Status: Being Prepared
Resource Locate Status: Resource Located
 Edit | Resource Locate | Set Complete | Manage Fulfillment Options | Items | Re
- 2

18655 Alma - PART OF - Local Holding and Host Holding
Physical Book By Author (Publisher year)
Availability: Physical version at **MAIN: main** (1 copy, 1 available)
 Physical version at **LAW: LAWRR**
 Physical version at **MUS: music**

Availability of related records:
 Physical version at **GRAD: grad** (1 copy, 1 available)
 Physical version at **MUS: music** (1 copy, 1 available)
 Physical version at **MAIN: main**

Request Status: Being Prepared
Resource Locate Status: Resource Located
 Edit | Resource Locate | Set Complete | Manage Fulfillment Options | Items | Re

Figure 12 – Related Record with Holdings/Items (Edit Reading List Page)

In addition, holdings for the related record and its host record can be managed for citations in reading lists. For more information, see the Technical Instructions section below.

Technical Instructions

To manage a course’s reading list, you must have one of the following roles:

- Course Operator attached to a course department

- Course Manager attached to a course department
- Fulfillment Operator attached to a course department
- Fulfillment Manager attached to a course department

To manage reading list citations with “Part Of” relations:

- 1 Click **Reading Lists** under **Fulfillment > Course Reserves** to open the Reading Lists Task List page.
- 2 Select **Actions > Work On** to modify the reading list.
The Edit Reading List page opens.

[Edit Reading List](#) [Cancel](#) [Print Slip](#) Being Prepared [Change](#)

Course Code: TCOM321 **Section:** -

Processing: Main Library Course **Instructors:** Bezalio
Department: Reserves

Reading List Information

Code: * Piatelli - Sprint(1)
Name: * Managing Diversity(1)
Owner: Abutbul, Noam
Status: Being Prepared
Due Back Date: 02/27/2015

[Citations](#) [Notes](#)

Alerts: All Citation/Locate Status All

[Add Repository Citation](#) [Add Non-Repository Citation](#) [Add Brief](#)

Select All

1 **18655 Alma - HOST WITH HOLDING**
Physical Book By Author (Publisher year)
Availability: Physical version at **GRAD: grad** (1 copy, 1 available)
 Physical version at **MUS: music** (1 copy, 1 available)
 Physical version at **MAIN: main**
Request Status: Being Prepared
Resource Locate Status: Resource Located
[Edit](#) | [Resource Locate](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Item](#)

2 **18655 Alma - PART OF - Local Holding and Host Holding**
Physical Book By Author (Publisher year)
Availability: Physical version at **MAIN: main** (1 copy, 1 available)
 Physical version at **LAW: LAWRR**
 Physical version at **MUS: music**
Availability of related records:
 Physical version at **GRAD: grad** (1 copy, 1 available)
 Physical version at **MUS: music** (1 copy, 1 available)
 Physical version at **MAIN: main**
Request Status: Being Prepared
Resource Locate Status: Resource Located
[Edit](#) | [Resource Locate](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Item](#)

Figure 13 – Citations on Edit Reading List Page

3 Click **Manage Fulfillment Options**.

The holdings for the related record and its host record display on the Manage Resource Options page.

Manage Resource Options [Cancel](#) [Update Move Expiry](#) [Remove Alerts](#) [Place Request](#)

Title: 18655 Alma - PART OF - Local Holding and Host Holding Author: Author Place Of Publisher
 Chapter: - Pages: - Additional Person - Publication:
 Note: - Name:
 Alerts: -

Electronic Services

No records were found.

Digital Services

No records were found.

Physical Services

1 - 6 of 6 Records [Tools](#)

	Library	Location	Call Number	No. of Items	Available	Actions
1	Main Library	Stacks	-	1	1	Actions
2	Law Library	Reading Room	-	0	0	Actions
3	Music Library	Stacks	-	0	0	Actions
4	Graduate Library	Stacks	-	1	1	Actions
5	Music Library	Stacks	-	1	1	Actions
6	Main Library	Stacks	-	0	0	Actions

1 - 6 of 6 Records [Tools](#)

Figure 14 – Manage Resource Options Page

- Select the action that you want to perform on the item: View, Request (related record’s items only), or Update Move Expiry.

Note: You cannot request the host’s items from this page.

Dynamic URL for Electronic Collections

Description

This enhancement allows you to create sophisticated dynamic URLs for local electronic collections and portfolios. Instead of managing static links for local electronic collections and portfolios, you can now use the dynamic link URL syntax to construct URLs at different levels,

including the option to embed OpenURL metadata information dynamically. In addition, you can use dynamic URLs to override linking provided by the community knowledge base.

Technical Instructions

In addition to the following roles, any role that can access the Electronic Resource Editor can update linking information for electronic collection services and portfolios:

- Catalog Administrator
- Electronic Inventory Operator
- Electronic Inventory Administrator

To define a dynamic URL at the service level:

- 1 Perform a repository search to find the electronic collection that you want to modify.
- 2 Click the **Edit Service** link in the results to open the Electronic Service Editor page.
- 3 Click the **Linking Information** tab.

Electronic Service Editor

Electronic Collection name [ProQuest Engineering Journals New Platform](#)

Service Type Full Text

Service Description Activation Information **Linking Information** Portfolios

Parser PROQUEST::open

Parser parameters url=http://gateway.proquest.com/openurl & clientid=\$\$\$CLIENTID

URL Type Dynamic URL Parser Parameters

Dynamic URL

```
IF (rft.issn, rft.year, rft.volume)
    http://www.publisher.com/{rft.issn}/{rft.year}/{rft.volume}
IF (rft.issn, rft.year)
    http://www.publisher.com/{rft.issn}/{rft.year}
IF (rft.issn)
    http://www.publisher.com/{rft.issn}
IF ()
    http://www.publisher.com
```

[Test dynamic URL syntax](#)

Service is free? Not Free

Crossref Supported No

Crossref Enabled No Yes INHERIT

Proxy enabled No Yes

Proxy selected

Linking level Article

Figure 15 – Electronic Service Editor – Linking Information

- 4 Select the **Dynamic** option in the **URL type** field.
- 5 In the **Dynamic URL** field, specify the conditions used to select the URL for the service.

Each condition starts with an IF statements that checks for the existence of ContextObject and OpenURL parameters. If all parameters exist for a condition starting at the top of the list, the specified URL for that condition is used. Otherwise, the next condition will be checked, and so forth. For example:

```
IF (rft.issn, rft.year, rft.volume)
    http://www.publisher.com/{rft.issn}/{rft.year}/{rft.volume}
IF (rft.issn, rft.year)
```

```
http://www.publisher.com/{rft.issn}/{rft.year}
IF (rft.issn)
http://www.publisher.com/{rft.issn}
IF ()
http://www.publisher.com
```

If the first condition is met in the above example, the resulting dynamic URL may look something like the following:

```
http://www.publisher.com/1364-0321/2010/2
```

In addition, the URL may include any of the following functions to manipulate the values returned in the specified parameters:

- **SUBSTR** (string, from, length) – Returns a substring of the specified string, based on the starting position and length of the string. If {rft.date} contains 2010-08-01, and the first four characters from the beginning of the string are specified, as follows:

```
http://www.publisher.com/{rft.issn}/SUBSTR({rft.date},0,4)
```

the system uses the following URL:

```
http://www.publisher.com/1824-6321/2010
```

- **REPLACE** (string, search, replace) – Replaces text in the specified string, based on search and replacement text. If {rft.isbn} contains dashes (for example, 978-1-285-13563-2) and no replacement text is specified, as follows:

```
http://www.publisher.com/REPLACE({rft.isbn},-)
```

the system uses the following URL:

```
http://www.publisher.com/9781285135632
```

- **URLENCODE** (string) – Encodes special characters in the specified string. If {rft.atitle} contains **The Grapes of Wrath**, and encoding is requested, as follows:

```
http://www.publisher.com/URLENCODE({rft.atitle})
```

the system uses the following URL:

```
http://www.publisher.com/The%20Grapes%20of%20Wrath
```

6 Click **Test dynamic URL syntax** to verify the syntax of your conditions.

7 Click **Save**.

To define a dynamic URL at the portfolio level:

- 1 Perform a repository search to find the electronic portfolio that you want to modify.
- 2 Click the **Edit** link in the results to open the Electronic Portfolio Editor page.
- 3 Click the **Linking Information** tab.

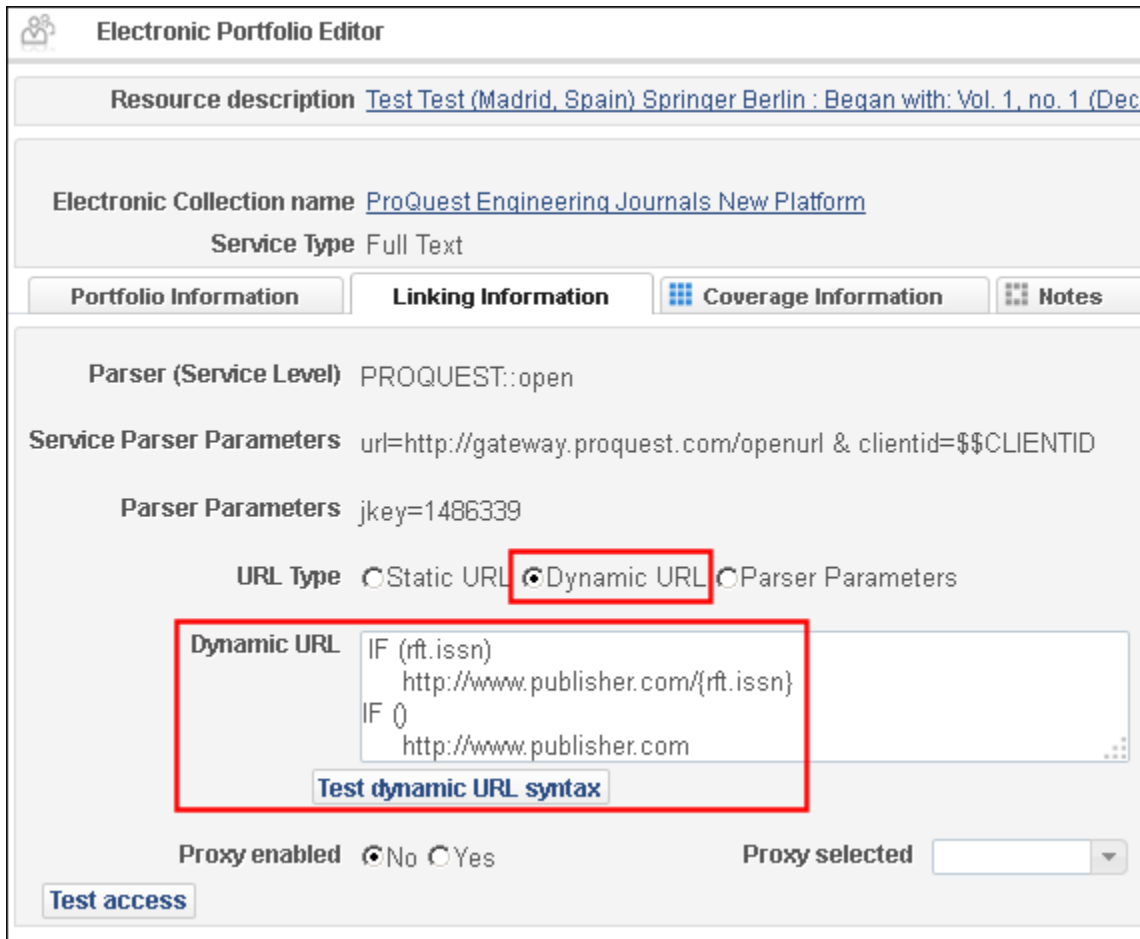


Figure 16 – Electronic Portfolio Editor – Linking Information

- 4 Select the **Dynamic** option in the **URL type** field.
- 5 In the **Dynamic URL** field, specify the conditions used to select the URL for the portfolio.
- 6 Click **Test dynamic URL syntax** to verify the syntax of your conditions.
- 7 Click **Save**.

Import Process – Preference Given to Matching Bibliographic Record Based on Inventory

Description

In order to reduce the amount of manual work involved in resolving multiple bibliographic matches, the import process now allows you to give preference to a matching bibliographic record that contains the same type of inventory as the records that you are importing.

Note: The multiple match preference is supported in the context of collaborative networks and also for real-time acquisitions if configured in the profile.

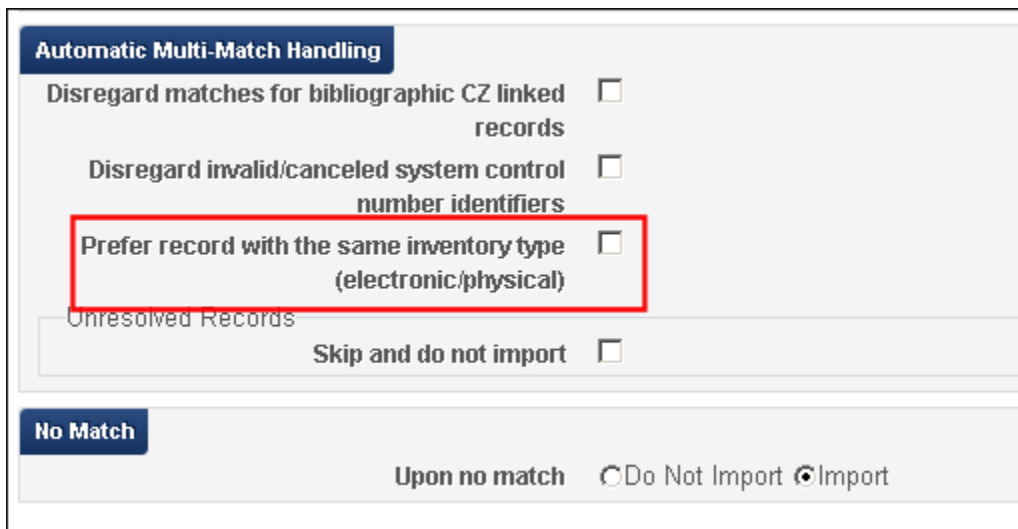
Technical Instructions

The following role can configure import profiles:

- Catalog Administrator

To specify multi-match handling preference based on the inventory type:

- 1 Open the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import section > Import Profiles**).
- 2 Create a new import profile or edit (**Actions > Edit**) an existing import profile.
- 3 Select the **Automatic** option for the **Handling method** under **Match Actions**.
- 4 Select the **Prefer record with the same inventory type (electronic/physical)** parameter under **Automatic Multi-Match Handling**.



Automatic Multi-Match Handling

Disregard matches for bibliographic CZ linked records

Disregard invalid/canceled system control number identifiers

Prefer record with the same inventory type (electronic/physical)

Unresolved Records

Skip and do not import

No Match

Upon no match Do Not Import Import

Figure 17 - Automatic Multi-Match Handling Section of the Import Profile Page

When preference is given to the inventory type, the best match is determined as follows during the import:

- a The import process determines the source record's inventory type by the setting of the **Inventory Operations** field, as follows:
 - **None** - Indicates that no preference will be based on inventory.
 - **Physical** – Indicates that the preference will be based on physical inventory.
 - **Electronic** – Indicates that the preference will be based on electronic inventory.

- **Mixed** – When the inventory is mixed, the inventory type (electronic or physical) will be determined for each bibliography record according to the mapping of the **Resource type** field.
 - b The import process determines the inventory type for each matching record as follows:
 - If the matching record includes both physical and electronic inventory, the inventory is considered to be mixed.
 - If the matching record includes only physical or electronic inventory, the inventory of the matched record is considered to be of that type of inventory.
 - c If there is single matching record that contains only electronic or physical records, it will be considered a match if it matches the inventory type of the source. If there are multiple matching records that contain only electronic or physical records, no preference will be based on inventory type.
 - d If there is a single matching record that contains mixed inventory and there are no matching records that contain only electronic or physical records, the mixed record will be considered a match. Otherwise, no preference will be based on inventory type.
- 5 Complete the remaining sections of the import profile, including the **Match Profile** section.

Additional Fields in the Authority Metadata Profile

Description

According to the Library of Congress standard, the MARC 21 Authority profile now supports many additional fields, including the 09X local call number fields and 9XX local fields. In addition, search indexes have been added for the new 09X and 9XX fields.

Technical Instructions

The following roles can configure customer parameters:

- Catalog Administrator
- General System Administrator

To access the MARC 21 Authority profile:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Metadata Configuration** under **Cataloging**.
The Metadata Configuration List opens.
- 2 Click the **MARC21 Authority** link in the Profile column.

- 3 The Profile Details page displays the supported fields in the **Fields** tab.

To customize the new search indexes:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Search Indexes** under **Search Configuration**.

The Object Type Search Index Codes mapping table page opens.

- 2 Click **Customize** in the row containing the new search index (**local_authority_call_number_090 - local_authority_call_number_09X** or **local_authority_field_900 - local_authority_field_9XX**).

By default, the local indexes are inactive.

- 3 Activate the index.
- 4 Save your changes to the table.

Default OAI Base URL Added to Remote Repository

Description

When importing remote digital representations for digital titles in Alma, it is necessary to indicate the OAI base URL. It is now possible to configure a default OAI base URL that will be used automatically when you add a single remote digital representation or create an import profile that uses the OAI import protocol. Configuring a default OAI base URL makes configuring the import profile easier, as typically the base URL does not change from profile to profile of the same remote repository. (For more information, see the **Remote Digital Repositories** section of the *Alma Resource Management Guide* or the Alma Online Help.)

Technical Instructions

The following roles can configure the default OAI base URL:

- Cataloging Administrator
- General System Administrator

To configure a default OAI base URL:

- 1 On the Remote Digital Repositories page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Remote Digital Repositories**), click **Add Remote Repository Instance**. The Remote Digital Repository Details page is displayed.

Remote Digital Repository Details			
Remote Repository Code	ROSETTA_OAI_DC1	Remote Repository Name	Rosetta OAI DC format
Creation Date	2013-10-29 16:42:25	Modification Date	2013-10-29 16:42:25
<div style="display: flex; justify-content: space-around;"> General Information Transformer Rules Delivery </div>			
General Information			
Remote Repository Code *	ROSETTA_OAI_DC1	Remote Repository Name *	Rosetta OAI DC format
Remote System Type	Rosetta	Format	OAI DC Format
OAI Details			
OAI Base URL	http://dc03vg0053eu.hosted		

Figure 18 – IOA Base URL

- 2 Enter the information in the fields in the **General Information** section as described in the **Configuring Remote Digital Repositories** section of the *Alma Resource Management Guide* or the Alma Online Help.
- 3 In the **OAI Details** section, enter an OAI base URL.
- 4 Click **Next** and complete the configuration for the remote repository.

When you add a single remote digital representation or create an import profile that uses the OAI import protocol, the OAI base URL is automatically filled in.

Representation Details			
<div style="display: flex; justify-content: flex-end;"> Cancel Done </div>			
General Information			
Description -	Created By	exl_impl	Updated By
exl_impl			
Title Selection			
Select Title *			
Remote Representation Details			
Remote Digital Repository Instance *	Rosetta OAI DC format	Source Format	OAI DC Format
Library *		OAI Base URL *	http://dc03vg0053eu.hosted
			Connect
			Cancel Done

Figure 19 – Representation Details

Other Resource Management Enhancements

- Previously, all general publishing profiles that were configured to run at the bibliographic level were exported at the inventory type level. When a bibliographic record was associated with both electronic and print inventory, the bibliographic record was published twice, once

for print and once for electronic, sometimes causing synchronization errors in the third-party system. Alma will now publish inventory at the bibliographic level to prevent synchronization errors in third-party systems that cannot merge different feeds of information for the same record.

Note: All general publishing profiles will be disabled during the deployment of the release and enabled after the update has completed (which may take several hours). Please do not attempt to run general publishing jobs manually if the profile has been disabled by the system.

- Records that were exported to OCLC and then suppressed by changing the **Tools > Set Management Tags > Export to WorldCat** parameter to another value are now published as deleted.
- When editing an existing publishing profile (**Resource Management > Resource Management Configuration > Configuration Menu > Record Export > Publishing Profiles**), the parameters previously in the **OAI Publishing** tab are now displayed in the Publishing Profile Details page's **Profile Details** tab. You can select the **FTP** publishing protocol, the **OAI** publishing protocol, or both. Note that you must select at least one option.

The screenshot shows the 'Publishing Profile Details' page. The 'Profile Name' and 'Profile Description' fields are at the top. Below them are 'Status' (Active/Inactive), 'Scheduling' (Not scheduled), and 'Email Notifications'. The 'Content' section includes 'Set name' and 'Publish on' (Bibliographic level, Holdings/portfolio level, Item/portfolio level). The 'Publishing Protocol' section is divided into two subfields, each highlighted with a red box:

- FTP Subfields:**
 - FTP:
 - FTP configuration: [dropdown]
 - Sub-directory: [text input]
 - Single File Configuration:
 - MARC output format: MARC21 Binary
 - Number of records in file: 1000
 - Compressed File Configuration:
 - Use default file name: No Yes
 - Compressed file name prefix: [text input]
 - Compressed file extension: tar.gz
- OAI Subfields:**
 - OAI:
 - Set Spec: [text input]
 - Set Name: [text input]
 - Metadata Prefix: marc21

Figure 20 – Publishing Profile Details Page — FTP and OAI Subfields

- The **use_marc_sf_zero_as_auth_id** customer parameter which determines the method (id, text, or id_and_text) to be used in linking bibliographic records with authority records, is now configured only by Ex Libris, usually as part of the implementation process.
- An Information icon has been added to the Digital IE Resource Editor, the Digital Representation Resource Editor, and the Digital File Resource Editor. Click the icon to display creator information.

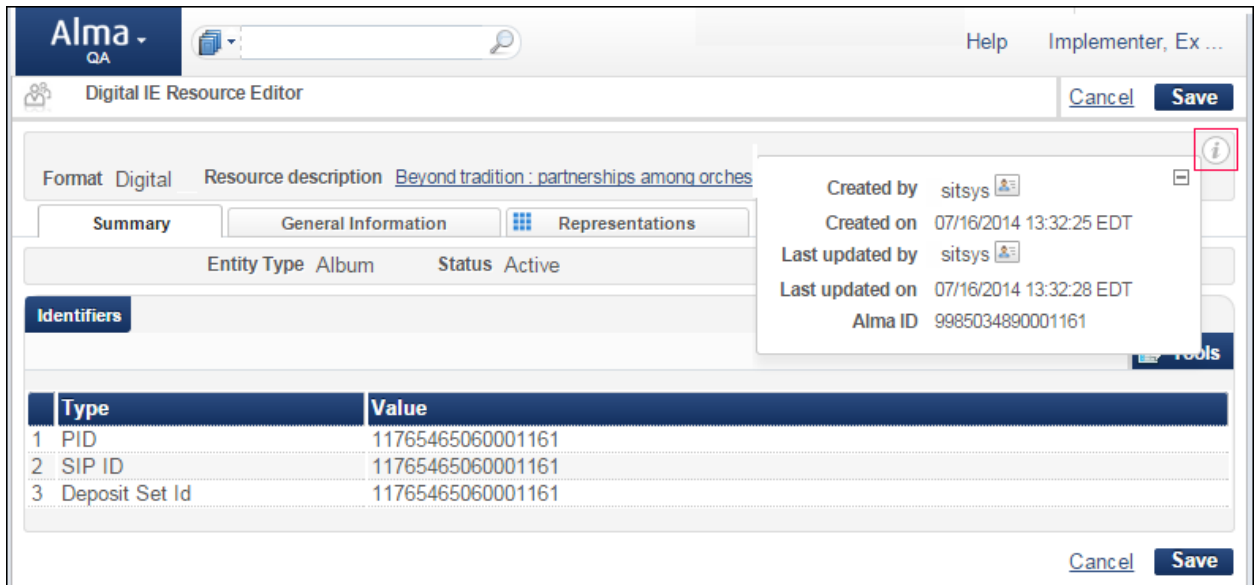


Figure 21 – Information Icon

Note: The creator information has been removed from the Summary tab.

- Several changes have been made to remote digital import profiles:
 - **Digital Remote** has been changed to **Digital** when selecting an import profile type:

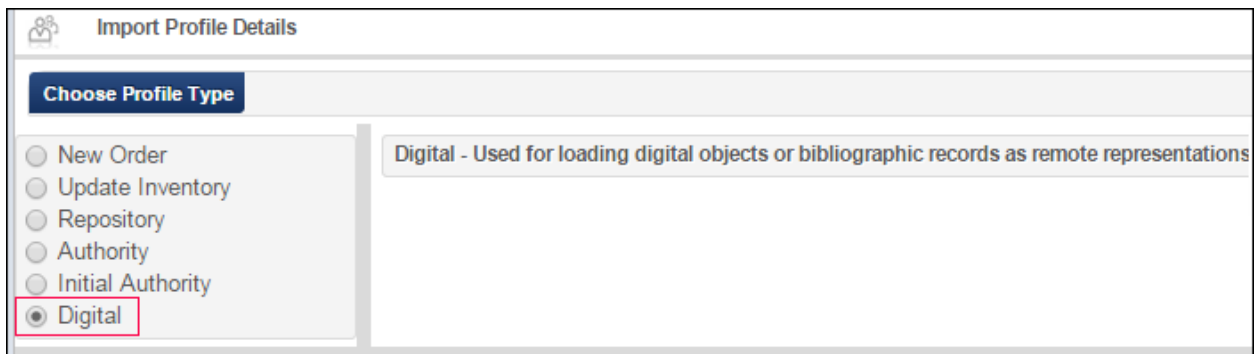


Figure 22 – Digital Profile Type

- When creating a digital import profile, the **Remote** check box is displayed (inactive for the March release) in the first step of the wizard.

Profile Type		Digital
Profile Details		
	Remote	<input checked="" type="checkbox"/>
	Profile name *	<input type="text"/>
	Profile description	<input type="text"/>
	Remote digital repository instance *	<input type="text"/>
	Import Protocol	Upload File/s
	Source format	MARC21 Bibliographic
	Active	True

Figure 23 – Remote Check Box

- A new fifth step has been added to the wizard when creating digital import profiles, as well as a corresponding new tab – **Inventory Information** – when editing digital import profiles.

Import Profile Details		1 2 3 4 5	
Profile Type		Digital	Profile name
			General Profile
IE			
	Status	Active	IE Entity Type
		<input type="text"/>	Generic Resource
	Collection assignment *	<input type="text"/>	
	Library *	<input type="text"/>	<input type="text"/>
		Back	Cancel
		Save Draft	Save

Figure 24 – Digital Import Profile – Fifth Step

Import Profile Details		1 2 3 4 5	
Profile Type		Digital	Profile name
			OpenBU-Theses OPEN-TEST
Profile Details	Normalization & Validation	Match Profile	Set Management Tags
			Inventory Information
IE			
	Status	Active	IE Entity Type
		<input type="text"/>	Generic Resource
	Collection assignment *	butheses	
	Library *	<input type="text"/>	<input type="text"/>

Figure 25 – Digital Import Profile – Inventory Information

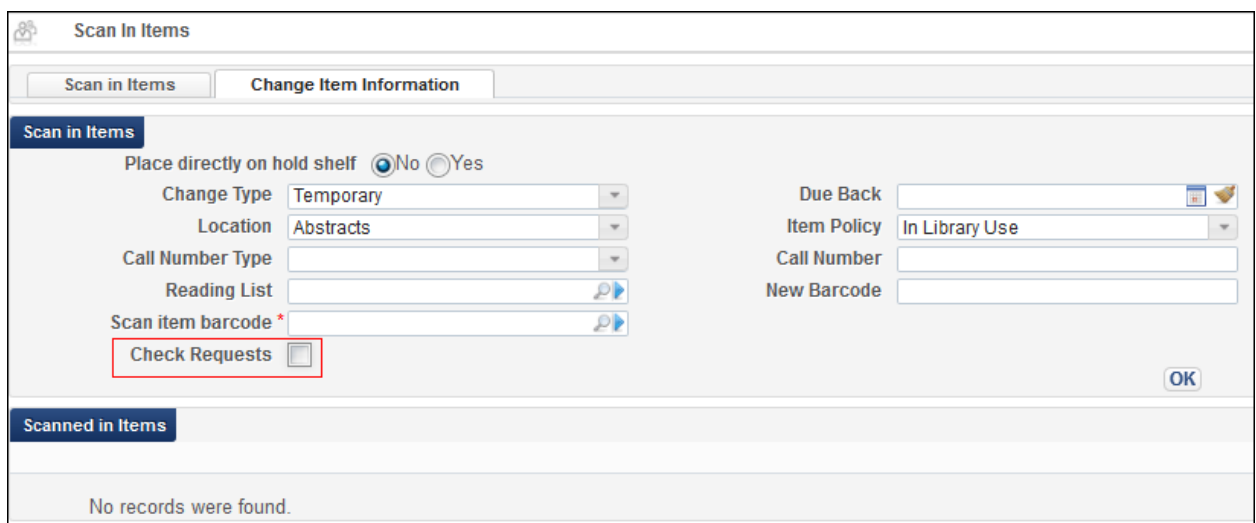
Note: The **Collection assignment** and **Library** fields were moved from the first step of the wizard (**Profile Details** tab) and the **Status** and **IE entity type** fields have been added as found in the Digital IE Resource Editor.

- The **Dismiss All** option on the Community Zone Updates Task List page (**Resource Management > Manage Inventory > Community Zone Updates Task List**) now deletes all tasks on the tasks list, not just the tasks that appear on the current page.
- The **Delete/deactivate portfolios** option in the import profile configuration (Inventory Information tab) is now disabled for standalone portfolios where the profile type is not PDA Repository/New Order.
- When working with normalization rules in the MD Editor, the snippet functionality (when selecting **Edit > Add Rule**) has been removed. In an upcoming Alma release, out-of-the-box normalization rules will be available for copying instead.
- The bibliographic field 830 (Series Added Entry - Uniform Title, subfields \$a, \$x, and \$v) is now displayed in the **Series** line of the Repository Search (Look Ahead). Note that if the bib record contains 4XX fields, they will precede 830 in the Series line.
- In the MD Editor, a new hot key, **Ctrl+U**, was added to validate a record action.

Fulfillment

The following are the enhancements to the Fulfillment functional area in the March 2015 release of Alma:

- On the Scan In Items page's Change Information tab (**Fulfillment > Resource Requests > Scan In Items**, click the **Change Information** tab), the **Check Requests** check box determines whether changes made to the **Location** and **Item policy** fields generate a confirmation message during the current session. When the check box is selected and an item has requests, a confirmation message appears when these fields are modified. When the check box is not selected, no confirmation message appears when these fields are modified.



The screenshot shows the 'Scan In Items' interface. At the top, there are two tabs: 'Scan in Items' and 'Change Item Information'. The 'Change Item Information' tab is active. Below the tabs, there is a section titled 'Scan in Items' with a sub-section 'Place directly on hold shelf' containing radio buttons for 'No' (selected) and 'Yes'. To the right of this are fields for 'Due Back', 'Item Policy' (set to 'In Library Use'), 'Call Number', and 'New Barcode'. Below these are fields for 'Change Type' (set to 'Temporary'), 'Location' (set to 'Abstracts'), 'Call Number Type', 'Reading List', and 'Scan item barcode *'. A red box highlights the 'Check Requests' checkbox, which is currently unchecked. An 'OK' button is located at the bottom right of the form. Below the form is a section titled 'Scanned in Items' which displays the message 'No records were found.'

Figure 26 – Scan In Items Page — Check Requests Check Box

- When applying a display logic rule, the campus indicated in the Alma Link Resolver openURL is used.

Resource Sharing

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

Support of Multiple Record Identifiers for Lending Side Broker Integration

Description

This feature enables resource sharing broker systems to use NCIP for placing lending-side requests using additional record identifiers, such as ISBN, ISSN and the Alma record ID. Additional broker systems can now be integrated with Alma on the lending-side, using the additional record identifiers as points of integration.

Technical Instructions

The following role can define search criteria to be used by an NCIP resource sharing partner:

- Resource Sharing Partners Manager

To define search criteria to be used by an NCIP resource sharing partner:

- 1 On the Resource Sharing Partner page (**Fulfillment > Resource Sharing > Partners**, select **Actions > Edit** for an NCIP partner), click the **Parameters** tab. The following page opens.

The screenshot shows the 'Parameters' tab for a Resource Sharing Partner. The page is titled 'Resource Sharing Partner' and displays the following information:

- Partner Code: ARTE_profile
- Partner Name: ARTEmail profile 1

The 'Parameters' tab is active, and the 'General Information' section is expanded. The fields and their values are:

- User identifier type: Barcode
- Request pushing method: Open URL Link
- URL template: (empty text box)
- Enable service for guest user: No Yes
- Disable service when: Never
 When resource is owned by the campus
 When resource is owned by the campus and available
 When resource is owned by the institution
 When resource is owned by the institution and available
- Loan period: (empty text box)
- Default library owner: Resource Sharing Library

The 'Request Item' section is also expanded, showing:

- Bibliographic record ID type: OCLC Number

The 'Check-Out Item' section is expanded, showing:

- Default location: Borrowing Resource Shari
- Default item policy: Two Hour Loan

The 'Accept Item' section is expanded, showing:

- Default location: Lending Resource Sharing
- Default pickup library: Art Library
- Automatic receive:

The 'Look Up User' section is expanded, showing:

- Require Authentication: No Yes

Figure 27 – Resource Sharing Partner Page — Parameters Tab

- 2 In the **Request Item** section, locate the **Bibliographic record ID type** field and select a parameter by which resource sharing requests are to be searched. Possible values are:
 - OCLC Number
 - MMS ID
 - LCCN
 - ISBN_ISSN

- Taken from message — Indicates that the bibliographic record ID type is to be taken from the NCIP message sent by the partner. The relevant value is one of the other values available in this field, and is taken from the **BibliographicRecordIdentifierCode** tag in the message.

Edition Field Supported in the Locate Process for Locating Resource Sharing Library Items

Description

The **Edition** field is now used in the locate process. This field is supported for both the **borrower locate** and the **lender locate** processes, as follows:

- **Borrower Locate:** When populated on the borrowing request form, the **Edition** field narrows the list of potential suppliers to only those with the specified **Edition** value.
- **Lender Locate:** The **Edition** field value in the lending request must match the **Edition** specified in the record at the lending institution.

The locate process on both the borrower and lender side is more precise, processing only those resources with the specified edition value in the request.

Technical Instructions

The following roles can configure the borrowing locate process to search only for lenders holding the **Edition** value specified in the request form:

- General System Administrator
- Fulfillment Administrator

The following role can configure the resource sharing library to match incoming lending requests with the local inventory when the **Edition** field value matches:

- General System Administrator

The following roles can configure a borrowing request to include the requested **Edition** value:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure the borrowing locate process to search only for potential lenders holding the Edition value specified in the request form:

- 1 On the Locate Profiles List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Locate Profiles**), select **Actions > Edit** for a locate profile of **Type = Alma**. The Locate Profile Details page opens.

Name	Description
locate1	locate1

General Information

Name * locate1

Description * locate1

Type Alma

Figure 28 – Locate Profile Details Page

Note: The configuration options described below are supported only for locate profiles of **Type = Alma**.

- 2 Click the **Locate Profile Parameters** tab. The following page appears.

Locate Profile Details

Locate Profile Details | Locate Profile Parameters

Name	locate1	Description	locate1
------	---------	-------------	---------

General Information

Server * il-urm01.corp.exlibrisgroup.com

Port 1807

Username main

Password ●●●●

Institution * EXLDEV1_INST

Alma Network

Check

Availability/Requestability

Locate By Fields

[Test Connection](#)

Figure 29 – Locate Profile Details Page — Locate Profile Parameters Tab

- 3 Select the **Locate by fields** check box. The subfields by which the locate profile can search the potential lending institution appear.

Locate Profile Details

Locate Profile Details | Locate Profile Parameters

Name	locate1	Description	locate1
------	---------	-------------	---------

General Information

Server * il-urm01.corp.exlibrisgroup.com

Port 1807

Username main

Password ●●●●

Institution * EXLDEV1_INST

Alma Network

Check

Availability/Requestability

Locate By Fields

Title

Author

ISBN / ISSN

OCLC Number

Edition

LCCN (010)

[Test Connection](#)

Figure 30 – Locate Profile Details Page — Locate By Fields Check Box and Subfields

- 4 Select the **Edition** field to enable searching for resources in the potential lending institution by the resources' edition.

To configure the resource sharing library to match incoming lending requests with the local inventory according to the Edition field value:

- 1 On the List of Libraries page (**Administration > General Configuration > Configuration Menu > Libraries > Add a Library or Edit Library Information**), select **Edit** for the Resource Sharing Library. The Organization Unit Details page opens.

The screenshot shows the 'Organization Unit Details' page for a 'Resource Sharing Library'. The page is divided into several sections:

- General Details:** Organization Unit Name: Resource Sharing Library; Code: RES_SHARE; Description: Temporarily manages inventory that is sent to or received from resource sharing partners; Path: EXLDEV1.EXLDEV1_INST.RES_SHARE; Default Location for Acquisition: [dropdown]; Campus: [dropdown]; Proxy: [dropdown].
- Resource Sharing Information:** Is Resource Sharing Library: ; Itemless: ; ISO Symbol: ALMA_ISO_MAIN.
- Borrowing Setup:** Cancel request on locate failure: ; Automatically activate locate profile: ; Default Location: Borrowing Resource Sharing Reque; Default Pickup Location: Main Library.
- Lending Setup:** Automatically Locate Resource: ; Default Location: Lending Resource Sharing Reques; Locate By Fields: .

Figure 31 – Organization Unit Details Page

- 2 In the **Resource Sharing Information** section, select the **Locate by fields** check box. The subfields by which the locate profile can search the resource sharing library display.

Resource Sharing Information

Is Resource Sharing Library

Itemless

ISO Symbol

Borrowing Setup

Cancel request on locate failure

Automatically activate locate profile

Default Location

Default Pickup Location

Lending Setup

Automatically Locate Resource

Default Location

Locate By Fields

Title

Author

ISBN / ISSN

OCLC Number

Edition

LCCN (010)

Figure 32 – Edition Sub-Field

- 3 Select the **Edition** field to enable searching the local resource sharing library by the resources' edition.

To configure a resource sharing borrowing request to send information on the resource's edition to the lending library:

- 1 On the Resource Sharing Borrowing Requests Page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Add > Manually** and select **Book**. The Resource Sharing Borrowing Request page opens.

Resource Sharing Borrowing Request

General Information Parameters

Resource Information

Title *

Author

Author Initials

Edition

ISBN

LCCN

OCLC Number

Publisher

Publication Date

Place of Publication

Additional Person Name

Source

Series Title Number

Call Number

Note

Volume

Part

Chapter

Pages

Request Attribute

Specific Edition Only

Requester *

Request Status Created borrowing request

Requested Format Physical

Allow Other Format

Preferred Send Method

Date Needed By

Delivery Location Deliver to library Alternative address

Pickup At *

Shipping Cost USD

Willing to Pay

Agree to Copyright terms

Needs patron information

Request Note

Figure 33 – Resource Sharing Borrowing Request Page

- 2 In the **Request Attribute** section, locate the **Specific edition only** field.

Figure 34 – Resource Sharing Borrowing Request Page — Specific Edition Only Field

- 3 Select the **Specific edition only** field to configure the request to send information on the resource’s edition to the lending library.

Printing a Shipping Slip When Shipping an Item

Description

This feature enables the lender to print a shipping slip when shipping an item. The shipping slip may be used by the borrower to streamline the receive process. This enhanced shipping slip contains information more specific to the item being shipped.

Technical Instructions

The following roles can configure automatic sending of a shipping slip when an item is being shipped:

- Fulfillment Services Operator
- Fulfillment Services Manager

To enable automatic sending of a print slip for shipped items:

- 1 On the Shipping Items page (**Fulfillment > Resource Sharing > Shipping Items**), locate the **Automatically print slip** field.

The screenshot shows a web interface titled "Shipping Items". At the top, there is a "Shipping Items" tab. Below the tab, there is a form with the following fields and options:

- Automatically Print Slip:** Radio buttons for "No" and "Yes". The "Yes" option is selected and highlighted with a red box.
- Shipping Format:** Radio buttons for "Digital", "Physical", and "Physical non-returnable". The "Physical" option is selected.
- Shipping Cost:** A text input field followed by "USD".
- Due Date:** A date picker field.
- Location:** A dropdown menu.
- Internal Note:** A large text area with a "..." icon at the bottom right.
- Scan Request ID:** A text input field.
- Scan Item Barcode:** A text input field with a magnifying glass icon and an "OK" button.

At the bottom of the form, there is a message: "No records were found."

Figure 35 – Shipping Items Page

- 2 Select **Yes** to automatically send a print slip when shipping an item. A print slip is sent for the item specified in the **Scan request ID** and **Scan item barcode** fields. The slip that is printed contains information that is specific to the item being shipped.

You can manually print a shipping slip by clicking the **Print Slip** link on the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**) for requests that have already been shipped.

Note: For requests that have not yet been shipped, the **Print slip** option prints an incoming request slip. For requests that have already been shipped, the **Print slip** option prints a shipping slip.

Viewing Extended Request Information in the Requests Task List

Description

Staff processing borrowing or lending requests can view expanded request information without having to open the request using the **Edit** button.

Technical Instructions

The following roles can view additional details about a borrowing or lending request:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view additional details about a borrowing or lending request:

On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**) or Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **More Details** for a request. The More Details pop-up window opens, displaying additional details about the request that are not displayed in the request's listing on the page.

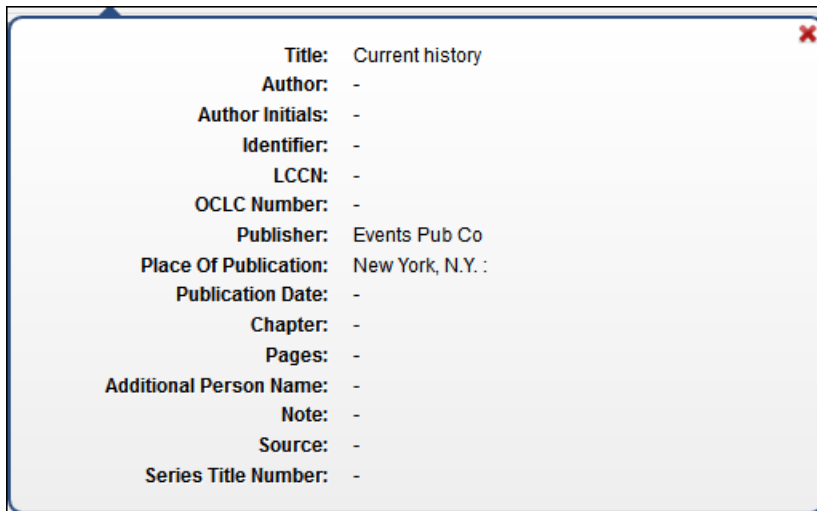


Figure 36 – More Details Pop-Up Window

Configuring Rules for Maximum Allowed Renewals of Lending Requests

Description

This feature enables lenders to automatically control the maximum time that the due date for shipped-out items can be extended.

When configuring a lending resource sharing TOU, the **Maximum Renew Date** policy type can be configured. When active, this policy indicates the maximum amount of time after a lending request is sent that renewal of the request is permitted.

For example, if the **Maximum Renew Date** policy has a value of **2 weeks**, when using the **Renew** option on the lending side, the system blocks renewal if the due date after renewal is more than two weeks after the item was shipped.

Additionally, if requests exist on an item which is being renewed, the renewal is rejected.

If requests exist on the title that is being renewed, the renewal succeeds or is rejected based on the configured block preferences setting (see the relevant procedure below).

Technical Instructions

The following roles can configure the Maximum Renew Date policy type:

- General System Administrator
- Fulfillment Administrator

To configure the Maximum Renew Date policy type:

- 1 On the Select Fulfillment Terms of Use Type page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**), click **Add a Terms of Use** and select **Lending resource sharing**. The Terms of Use Details page opens.

Terms of Use Details	
You are configuring: Main Campus	
Terms of Use Details	
Name *	<input type="text"/>
Description	<input type="text"/>
Due Date	Auto Due Date 2 days_1301151256
Maximum Renew Date	MaximumRenewDate - None (Does not calculate dates for renewal)

Figure 37 – Terms of Use Details Page

- For the **Maximum Renew Date** policy, select **Actions > Add Policy**. The Policy Details page opens.

The screenshot shows the 'Policy Details' page for a 'Maximum Renew Date' policy. The page title is 'Policy Details' and it indicates 'You are configuring: Main Campus'. The 'Policy Type' is 'Maximum Renew Date'. The 'Policy Name' field is empty. The 'Policy Description' field is empty. The 'Value Type' is set to 'Other'. The 'Value' field is empty. The 'Unit Of Measurement' field is empty. The 'Default Policy' is set to 'False'.

Figure 38 – Policy Details Page

- In the **Policy name** field, enter a name for the policy.
- Optionally, in the **Policy description** field, enter a description for the policy.
- In the **Value type** field, select **Other**. The **Value** and **Unit of measurement** fields appear.
- In the **Value** field, enter a numerical value for the policy's unit of measurement.
- In the **Unit of measurement** field, select criteria by which the policy is to be configured.

The screenshot shows the 'Policy Details' page for a 'Maximum Renew Date' policy with data entered. The page title is 'Policy Details' and it indicates 'You are configuring: Main Campus'. The 'Policy Type' is 'Maximum Renew Date'. The 'Policy Name' field contains '2 Week Renew Policy'. The 'Policy Description' field contains 'Requests can be renewed for up to 2 weeks after the request's submit date.'. The 'Value Type' is set to 'Other'. The 'Value' field contains '2'. The 'Unit Of Measurement' field is set to 'Week'. The 'Default Policy' is set to 'False'.

Figure 39 – Policy Details Page with Data

- Click **Save**. The policy name and description display on the Terms of Use Details page for the Maximum Renew Date policy type.

The screenshot shows the 'Terms of Use Details' configuration page. At the top, it indicates 'You are configuring: Main Campus'. Below this, there are fields for 'Name' and 'Description'. At the bottom, there are two specific configuration fields: 'Due Date' set to 'Auto Due Date 2 days_1301151256' and 'Maximum Renew Date' set to '2 Week Renew Policy (Requests can be renewed for up to 2 weeks after the request's submit date.)'. The 'Maximum Renew Date' field is highlighted with a red border.

Figure 40 – Terms of Use Details Page with New Policy

To configure the system behavior when there are title level requests on the renewed item:

- On the Workbench Preferences page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Block Preferences**), locate the **Not-Renewable – Item Has Request(s)** entry.

18	Patron is not active	Override By All	
19	Patron loan limit exceeded	Block	
20	Patron overdue limits has exceeded	Override By Manager	
21	Patron overdue recall limit exceeded	Block	
22	Not Renewable – Item has Request(s)	Handle Automatically	
23	Item is currently on loan by another patron	Override By Operator	Return the item and loan to the new patron

Figure 41 – Workbench Preferences Page — Not Renewable-Item has Request(s) Page

- In the **Actions** column, select **Handle Automatically** to permit request renewal when external requests exist for the title being renewed. Select any other option to reject request renewal when external requests exist for the title being renewed.

Withholding Patron Email Notification When Receiving Items

Description

This feature enables operators to prevent a notification from being sent to the patron when an item that has been requested for borrowing is received. This is particularly useful when the **Receive** action is used to notify Alma that an item has already been sent directly to the patron, so that no additional notice is required.

When receiving an item that has been requested for a borrowing request, you can prevent the system from sending an email to the patron. Previously, an email was automatically sent to patrons, notifying them that the item had arrived at the resource sharing library. Now, you can configure Alma to not send an email to a patron when the item is ready to be received, as there may be cases where the patron would receive the notification after already having received the item.

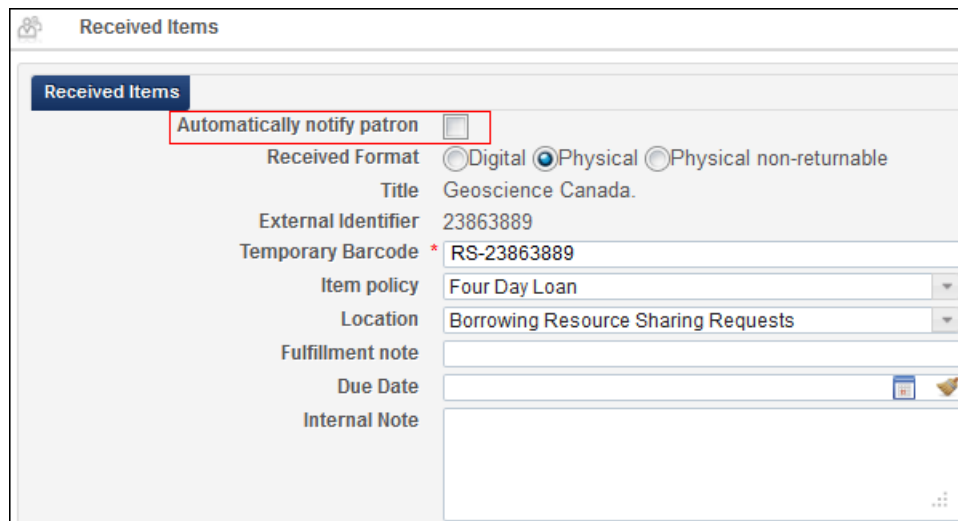
Technical Instructions

The following roles can block a borrowing request from sending a notification email to a patron:

- Fulfillment Services Operator
- Fulfillment Services Manager

To block sending an email to a patron when receiving a resource sharing item:

- 1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click the **Receive** link for a request. The Received Items page opens.



The screenshot shows the 'Received Items' page in Alma. The 'Automatically notify patron' checkbox is highlighted with a red box and is currently checked. Other fields include Received Format (Physical selected), Title (Geoscience Canada), External Identifier (23863889), Temporary Barcode (RS-23863889), Item policy (Four Day Loan), Location (Borrowing Resource Sharing Requests), Fulfillment note, Due Date, and Internal Note.

Figure 42 –Received Items Page

- 2 Clear the **Automatically notify patron** check box to withhold sending an email to the requesting patron when the item arrives at the resource sharing library. By default, this check box is selected.

You can also configure the **Automatically notify patron** check box on the Received Items page that is accessible from the Resource Sharing menu (**Fulfillment > Resource Sharing > Received Items**).

Other Resource Sharing Enhancements

- When configuring a locate profile, if the selected **Locate by Field** values do not exist for a query, (for example, the **ISBN** value is selected, and there is no borrowing request metadata containing ISBN), instead of a failure message, the repository search page opens, where you can click **Change Query** to change your search criteria.
- The following changes have been made regarding the maximum fee:
 - The maximum fee is transferred from Primo to Alma.
 - The **Maximum fee** field is now part of the Resource Sharing Requests API.
 - The **Maximum fee** input field has been added to resource sharing borrowing request attributes.
 - The maximum fee is now included in the request email and ISO request.
- The following request statuses will not be included when counting the number of requests for the resource sharing request limit policy: **Cancelled**, **Cancelled by Patron**, **Cancel Requested**, and **Deleted**.
- The **Publication Date** for serials will be sent and received using `PublicationDateOfComponent` when sending and receiving ISO requests.

Administration

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

Option to Bulk Add Internal Information to External Users

Description

This feature enables the bulk update of user records to add internally managed fields to external records.

When running the Update User Information for User Set job, you can configure the job to handle specific fields as internal, even though the user record may be external, or to handle the fields by the current account type (either external or internal).

Internal field values are not overridden during an SIS update. External field values are overridden during an SIS update.

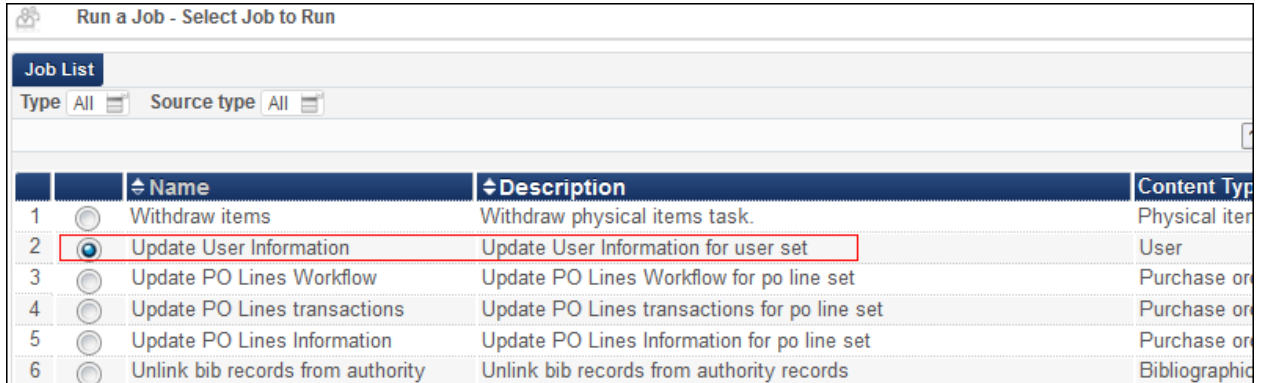
Technical Instructions

The following roles can configure the field type status in the Update User Information for User Set job:

- User Manager
- User Administrator

To configure the field type status in the Update User Information for User Set job:

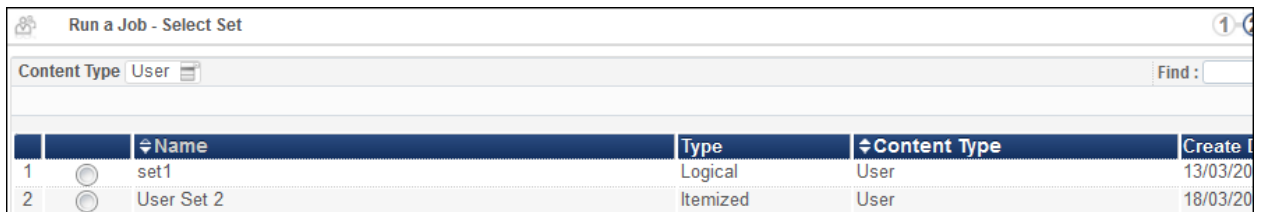
- 1 On the Run a Job – Select a Job to Run page (**Administration > Manage Jobs > Run a Job**), select the **Update User Information for User Set** job.



		Name	Description	Content Type
1	<input type="radio"/>	Withdraw items	Withdraw physical items task.	Physical item
2	<input checked="" type="radio"/>	Update User Information	Update User Information for user set	User
3	<input type="radio"/>	Update PO Lines Workflow	Update PO Lines Workflow for po line set	Purchase or
4	<input type="radio"/>	Update PO Lines transactions	Update PO Lines transactions for po line set	Purchase or
5	<input type="radio"/>	Update PO Lines Information	Update PO Lines Information for po line set	Purchase or
6	<input type="radio"/>	Unlink bib records from authority	Unlink bib records from authority records	Bibliographic

Figure 43 – Run a Job – Select Job to Run Page

- 2 Click **Next**. The Run a Job – Select Set page opens.



		Name	Type	Content Type	Create I
1	<input type="radio"/>	set1	Logical	User	13/03/20
2	<input type="radio"/>	User Set 2	Itemized	User	18/03/20

Figure 44 – Run a Job – Select Set Page

3 Select a set and click **Next**. The Run a Job – Enter Task Parameters page opens.

Run a Job - Enter Task Parameters

Task Parameters: Update User Information

Field type By user account type Internal

Expiry date Unconditionally

Purge date Unconditionally

Status Active Unconditionally

User group 03BC Master's Unconditionally

Campus Unconditionally

Add block type Disruptive behavior in library

Disable block type Disruptive behavior in library

Add statistics (category) Audiovisual

Remove statistics Audiovisual

Add role API Analytics Read

Remove role API Analytics Read

Add note

Job description Unconditionally

Add resource sharing library

Remove resource sharing library

Set to external account

Disable SMS

Figure 45 – Run a Job – Enter Task Parameters Page

4 In the **Field type** field at the top of the page, select the relevant parameter:

- **By user account type:** Handles specific fields according to the account type (internal or external).

For example, if using the job to add a block, the block is added as external for external users and as internal for internal users.

Internal field values are not overridden during an SIS update. External field values are overridden during an SIS update.

- **Internal:** Handles specific fields as if they are internal, even when belonging to an external account.

For example, if using the job to add a block, the block is added as internal even if the block is being attached to an external user.

Internal field values are not overridden during an SIS update.

The fields affected by this setting are:

- User group
- Campus
- Resource sharing library

- Add block type
- Add statistics category
- Add note

Other Administration Enhancements

- Only version 2 of the user XSD file will be supported for the User integration profile going forward. (Version 1 is considered deprecated, although it will continue working until January 2016.)
- The list of fines that opens when you select multiple fines to pay is no longer limited and can extend over several pages. In addition, it is now possible to sort the list by creation date, fine/fee type, and fee owner and to search it by owner name, title, and transaction ID. In addition, the fine/fee **Status** column was removed.

Collaborative Networks and Multicampus Institutions

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

Shared Vendor Information

Description

Global vendor information can now be shared between the Network Zone (NZ) of a consortium and member institutions. This alleviates the need for the member institutions to add vendor information independently. Each member of the consortium can define its own local parameters for its vendors.

The **Distribute Network Acquisition Changes to Members** job distributes the new vendor information that has been added to the NZ to member institutions. The job copies all vendors that have been added to the NZ since the date in the `acq_distribute_changes_last_run` parameter (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**). If the parameter is empty, all vendors in the NZ are copied to the member institutions.

Only global attributes are distributed from the NZ. These attributes cannot be configured on the local level. Local attributes (such as vendor account, EDI information, access provider, and vendor interface) are not distributed from the NZ. These attributes can be configured on the local level. Because the vendor account, access provider, and vendor interface are not distributed to member institutions, the vendor is inactive in the member institution until these attributes are added and the vendor is activated.

If a vendor that exists in a member institution is added to the NZ, the first time the job runs, the job changes the vendor to a shared vendor and adds the global attributes (such as contact information), but does not change the local attributes. Subsequently, runs of the job leave the vendor as local (not shared).

Technical Instructions

The following roles can configure this feature:

- Acquisitions Administrator
- General System Administrator

To configure this feature:

- 1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**), click **Customize** for the `acq_distribution_job` and change the parameter value to **True**.

The screenshot shows the 'Mapping Table' configuration page for 'Alma University'. It includes a 'Table Information' section with details like 'Sub System: INFRA', 'Table Name: Customer Parameters', and 'Table Description: Customer Parameters'. Below this is a table of 'Mapping Table Rows' with columns for 'parameter key', 'parameter module', 'parameter value', 'free text description', and an action button. Two rows are highlighted with red boxes: row 1 (parameter key: acq_distribute_changes_last_run, value: empty) and row 2 (parameter key: acq_distribution_job, value: true).

	parameter key	parameter module	parameter value	free text description	
1	acq_distribute_changes_last_run	acquisition		Last run time of the job	Customize
2	acq_distribution_job	acquisition	true		Customize
3	acquisition_accrual_mode	acquisition	false		Customize
4	assertion_over_po_line_price	acquisition	500		Restore
5	auto_claim	acquisition	Y	Send Claim notification	Customize
6	expended_from_fund_default	acquisition	true		Customize
7	exportPrepaidInv	acquisition	false	Invoice to be exported t	Customize
8	handle_invoice_payment	acquisition	true		Customize
9	invoice_allow_vat_in_line_level	acquisition	true		Restore

Figure 46 – Acquisitions Distribute Acquisition Changes Last Run and Acquisition Distribution Job Parameters

- 2 Click **Save**.

To run the Distribute Network Acquisition Changes to Members job:

- 1 In the NZ, open the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).
- 2 Select the **Scheduled** tab.

Monitor Jobs							De-Activate Selected	Activate Selected
Scheduled								
Filter : Acquisition								
1 - 10 of 10 Schedules								
	Active	Name	Job Category	Schedule	Next Run	Actions		
1	<input checked="" type="checkbox"/>	PO Line - Packaging	Acquisition	Every day at 14:00	02/05/2015 14:00:00 PST	Actions		
2	<input checked="" type="checkbox"/>	PO Line - Renewal	Acquisition	Every day at 19:00	02/05/2015 19:00:00 PST	Actions		
3	<input checked="" type="checkbox"/>	PO Line - Claiming	Acquisition	Every day at 02:00	02/06/2015 02:00:00 PST	Actions		
4	<input checked="" type="checkbox"/>	Trials - Start and Notify Participants	Acquisition	Every day at 21:00	02/05/2015 21:00:00 PST	Actions		
5	<input checked="" type="checkbox"/>	PO Line - Deferred	Acquisition	Every day at 20:00	02/05/2015 20:00:00 PST	Actions		
6	<input checked="" type="checkbox"/>	Recalculate transactions exchange rates	Acquisition	Every Sunday at 23:00	02/08/2015 23:00:00 PST	Actions		
7	<input checked="" type="checkbox"/>	PDA- Alert pda reached threshold	Acquisition	Every day at 01:00	02/06/2015 01:00:00 PST	Actions		
8	<input checked="" type="checkbox"/>	Recalculate PO line encumbrances based on current	Acquisition	-	-	Actions		
9	<input checked="" type="checkbox"/>	Notify E-Activation due task	Acquisition	Every day at 01:00	02/06/2015 01:00:00 PST	Actions		
10	<input checked="" type="checkbox"/>	Distribute network Acquisition changes to members	Acquisition	Every day at 22:00	02/05/2015 22:00:00 PST	Actions		

Figure 47 – Distribute Network Acquisition Changes to Members Job

- 3 Select **Distribute network acquisition changes to members** and click **Activate Selected**.
- 4 View the list of vendors (**Acquisitions > Acquisitions Infrastructure > Vendors**). The new **Shared** column indicates which vendors are shared by member institutions. Newly shared vendors are inactive.

Search Vendors							
Filter : Inactive							
Vendor Type All							
Add Vendor							
	Shared	Active	Vendor Code	Name	Vendor Type	Libraries	Actions
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0-011	Gale	Access Provider	Main Campus(Including)	Edit
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0-012	Elsevier	Material Supplier	Main Campus(Including)	Edit
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0-013	JSTOR	Material Supplier	Main Campus(Including)	Edit
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	010	Angus and Baker	Material Supplier	Main Campus(Including)	Edit
5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0-135	National Booksellers	Material Supplier	Main Campus(Including)	Edit
6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0-150	Boardman	Material Supplier	Main Campus(Including)	Edit
7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0-160	Wiley	Material Supplier	Main Campus(Including)	Edit
8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0415-WYLIE	Wylie publishers	Material Supplier	Main Campus(Including)	Edit
9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	18E EEUW	EEUW Booksellers	Material Supplier	Main Campus(Including)	Edit
10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A0172	John Jones Publishing Ltd	Material Supplier	Main Campus(Including)	Edit

Figure 48 –Shared Vendor Column

- 5 Click **Edit** for a shared vendor. Global attributes are non-editable:

Vendor Details

Vendor name Gale

Summary Contact Information Contact People EDI Information Invoice

Vendor General Details

Institution Main Campus

Name * Gale

Code * 0-011 Additional code

Financial Sys. code National tax ID

Status Inactive

Liable for VAT

Libraries Main Campus(Including)

Currencies ALL

Language English

Material Supplier/Subscription Agent Access Provider Licensor

Governmental

Accounts

Add

No records were found.

Interfaces

Add

No records were found.

Figure 49 – Global Attributes

Other Collaborative Network Enhancements

- In the MD Editor, if a record is shared with the Network Zone and you **select Edit > Add Local Field**, the controlled vocabulary now comes from the member institution rather than the Network Zone, as it did previously.

Analytics

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

Alma Analytics Community Folder New Structure

A new organizational structure and usage methodology has been implemented for the reports in the community folder. This methodology allows libraries to more efficiently contribute, locate, and share folders with each other. The structure represents business use cases from libraries. From now on, each institution will contribute reports to the relevant folder under /shared/Community/Reports/Shared Reports/Reports:



Figure 50 – Shared Reports > Reports Folder

Each institution will prefix the name of the report with its institution name and a dash so that that each report is identifiable by the institution that contributed it.

For example:

U. Minn - Lost Item Processing Fees Report

Otago - Fulfillment checkout stats (by circ desk)

Reports that are contributed by Ex Libris are prefixed with Ex Libris -

See the following examples:



Figure 51 – Contributed Reports – Example 1

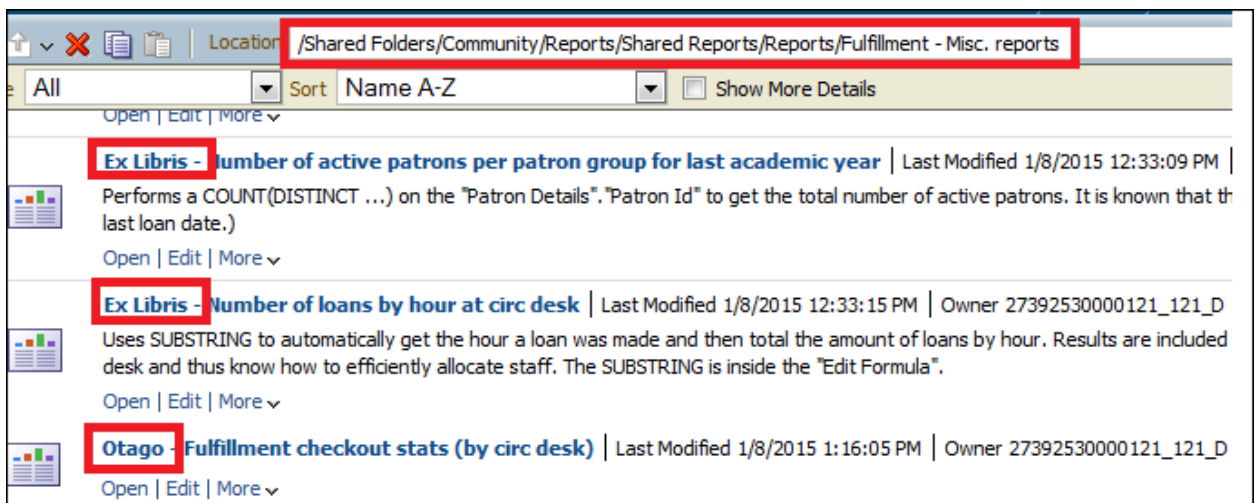


Figure 52 – Contributed Reports – Example 2

Each institution can browse the folders for reports pertaining to a specific area or perform a search for reports from a specific institution:

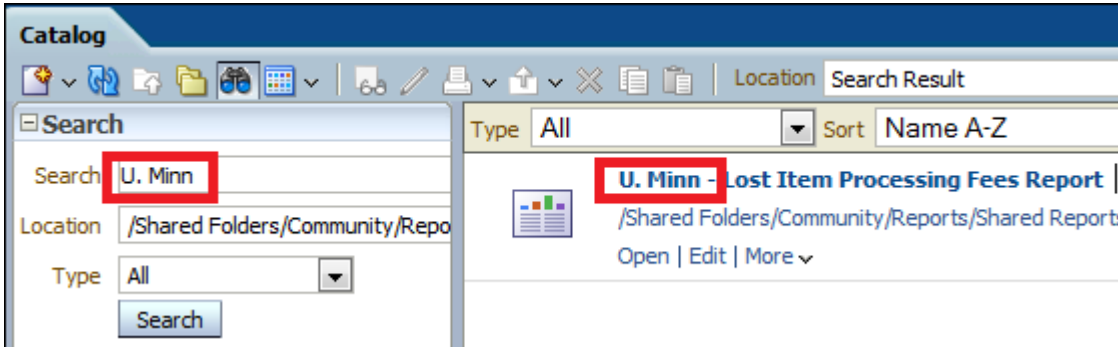


Figure 53 – Search for Reports

Libraries are encouraged to add information in the properties of the reports so that other libraries are able to identify the functionality of the report easily. For example:

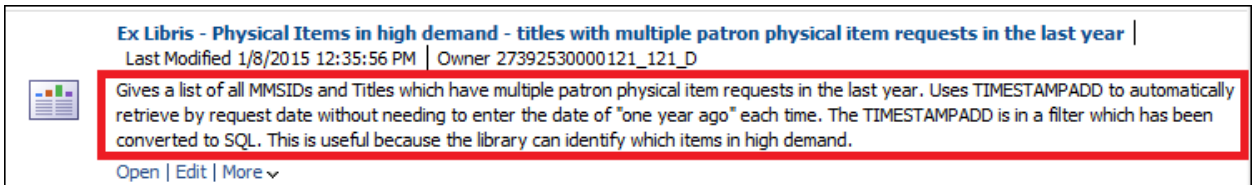


Figure 54 – Report Information

From now on, libraries should copy their existing reports from:

Shared Folders/Community/[Inst. Name]/[Report Name]

to:

Shared Folders/Community/Shared Reports/[Relevant Folder]/[Inst. Name]-[Report Name]

For example, prior to this development, reports were located at:

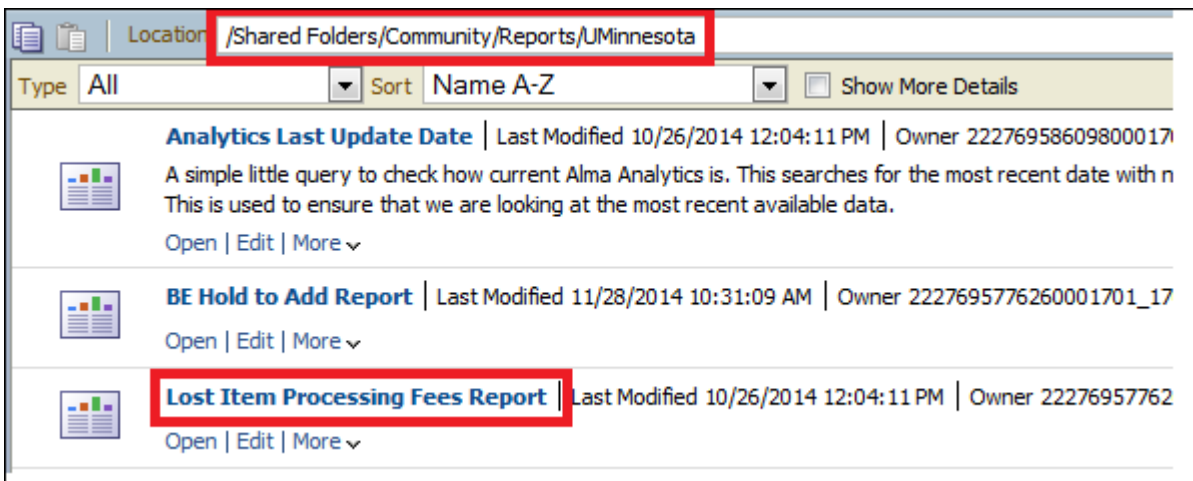


Figure 55 – Previous Report Location

Now reports are located at:

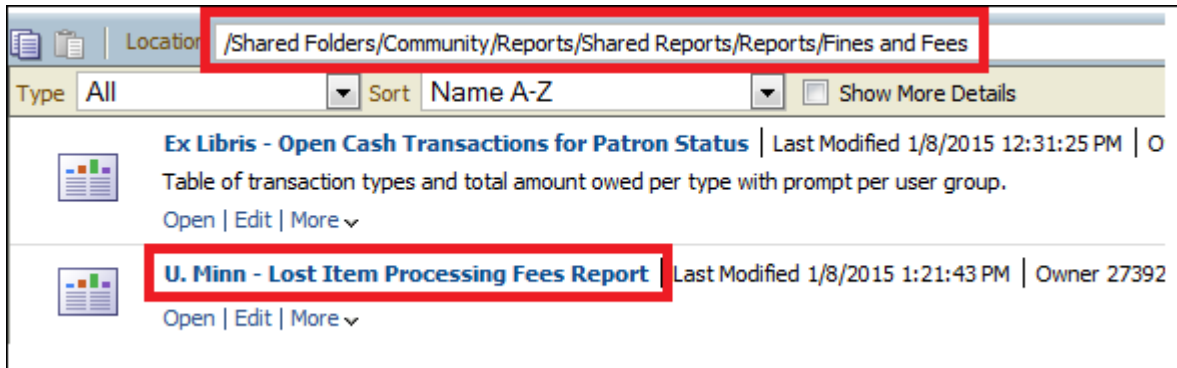


Figure 56 – Current Report Location

Eventually, after an institution has moved all of its reports so that the institution folder is empty, the folder can be deleted. Changes and additions to the folder structure will be announced in future release notes.

Other Analytics Enhancements

- In the Physical Items subject area, in the **Physical Item Details** folder, the following field names have been changed:
 - Times Loaned was changed to **Num of Loans**
 - Times Loaned - not sum was changed to **Num of Loans - not sum**
- In the Funds Expenditure subject area, the field Fund Area was renamed **Fund Area Code**. This field displays the area code. Another field, **Fund Area Description**, has been added, displaying the area description.
- In all subject areas, all measurements (marked by the yellow symbol) were transferred to the top of the subject area list.

Alma APIs

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

Alma RESTful APIs

- For the March release, the following RESTful APIs were added:
 - An API for retrieving invoices. For information, see <https://developers.exlibrisgroup.com/alma/apis/acq>
 - An API to create remote digital representations. For information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>
 - An API, `POST /bibs?from_nz_mms_id=[MMS_ID]`, to link to a Network Zone bibliographic record. For information, see <https://developers.exlibrisgroup.com/alma/apis/bibs>
- The ability to search for a PO line by MMS ID (in both the IZ and NZ) was added. For information, see <https://developers.exlibrisgroup.com/alma/apis/acq>
- The RESTful API used to retrieve user loans has two new optional parameters: **order_by** (loan_date, due_date, barcode, title and author) and **direction** (ascending/descending).
- The RESTful API that retrieves details about an item request now includes the item's barcode and item ID.
- The RESTful API for retrieving loan details now includes the item policy.

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.
- 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 displays for requests only when it is greater than 0 (zero). The count should also display 0 (zero) requests when they occur.

Fixed Issues

The following previously known issue has been fixed:

- The **Locate By** attributes of a Locate profile cannot be distributed from the Network Zone to member institutions.