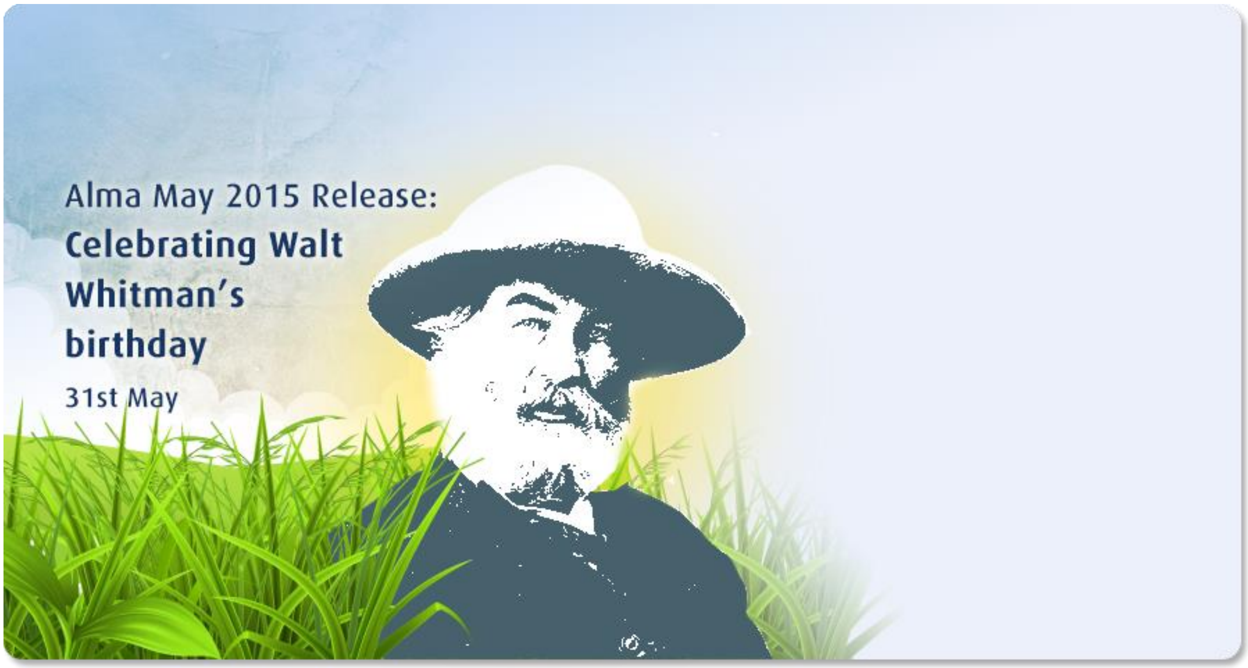

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About the Alma Release Notes

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 May 2015 Release Highlights
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- 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
  - Collaborative Networks and Multicampus Institutions
  - Analytics
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Alma May 2015 Release Highlights

Acquisitions

- Shelf-Ready Processing using EDI

  Alma now supports a shelf-ready process by means of an "Order Response" EDI file sent from a vendor. After receiving the Order Response, Alma updates the relevant PO lines. The vendor EDI Information tab was rearranged and includes new fields.

- Enhanced Staff Control on PO Line Inventory Creation

  Alma now supports creating PO lines without also automatically creating new inventory; instead, you add existing inventory to the PO lines manually. A new check box, **Assign Inventory Manually**, was added to the PO Line Owner and Type page.

Resource Management

- Contributing Portfolios to the Community Zone

  This new functionality continues the development effort of opening the Alma Community Zone for contributions. You can now update records on the portfolio level and correct the information and share the update with the entire community. In addition, you can contribute new portfolios to existing selected electronic collections.

- Shared Import Profile Templates in the Community Zone

  In order to simplify the integration process between Alma and vendors for repository, EOD, and shelf-ready workflows, the Community Zone now includes vendor-specific import profile templates. The templates are defined with the recommended configuration needed in order to implement the desired work flow with a specific vendor.

Fulfillment

- Return Anywhere

  Alma can now be configured to allow a patron to return items to any member of a fulfilment network, regardless of the institution from which you checked out the item. New fields were added on pages handling returns – for example, a new check box, **Item from another institution,** appears only if the institution is a member of a fulfillment network and has a **Circulate For** relationship with another member of the network.

Resource Sharing

- Increased Granularity in Specifying Requested Media

  Patrons are currently able to select whether they want to receive requested resources in digital or in physical format. Additional granularity is at times required; for example, a digital request may be for an audio file or for a visual; a physical request may be for a book or for a CD. Patrons are now able to specify the exact format in which the resource is required.

- Importing Borrowing Requests from an External System

  This feature enables importing resource sharing borrowing requests from an external system into Alma. To support this functionality, you must configure a **Resource Sharing Integration** profile in Alma. The borrowing requests are then imported by running a new import resource sharing requests job.

- Renew or Cancelation Email to Resource Sharing Partners

  Until now, Alma generated only the initial request message for resource sharing requests; any further communications had to be sent by external emails. This feature enables Alma to generate the commonly used **Renew** and **Cancellation** messages to be sent automatically when a resource sharing borrowing request is sent to a partner whose **Type** = **Email**.

Collaborative Networks and Multicampus Institutions

- Centralized Management of Configuration Tables

  Institutions that administer the Network Zone in a collaborative network can now perform configuration changes and distribute them automatically to member institutions in the collaborative network. This allows for easier coordination between member institutions and reduces duplication of effort.

- Relinking Bibliographic Records in the Network Zone or the Community Zone

  You can now relink an electronic portfolio bibliographic record to a different bibliographic record in the Network Zone or Community Zone. This is in addition to the current capability of being able to relink to another bibliographic record within the institution's local catalog.

- Shared Import Profile Templates in the Network Zone

  Shared import profile templates can be implemented at the Network Zone level. Import profiles managed centrally in the Network Zone can be used as templates that can be copied/customized at the member level.

Analytics

- Collaborative Network Level Reporting

  The shared Institution dimension was added to all subject areas. The dimension includes two fields: the Institution Code and the Institution Name. These fields allow the Network Zone institution to view reports by member institution.

Alma RESTful APIs

- The following RESTful APIs changes were made:
  - An API to retrieve MD import profiles was added. The results can be filtered by type (digital, electronic, physical).
  - Additions were made to the PO line APIs.
  - The API to retrieve a list of courses now includes **order_by** and **direction** (for sorting).

Alma Interface

- SAML Single Logout

  Alma can now be configured for a single logout from an external system. Dependent on configuration, when you log out of the external system, you are also automatically logged out of Alma. Alternatively, when you log out of the external system, the external system may present you with the option of also logging out of Alma. If you do not log out of Alma at that time, your Alma session remains active.

Data Services

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

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma Community Zone during the period 29-March-2015 through 26-April-2015:

- 18th- and 19th-Century Literature Archive 2006-2012
- Aesthetics and Cultural Theory 1999-2012
- Ancient Commentators on Aristotle
- Ancient History Archive 1983-2012
- Ancient Philosophy Archive 1984-2012
- Anthropology 2014
- Anthropology Archive
- Applied Linguistics Archive 2000-2012
- Beck Publishing 2014
- Biblical Studies 2013
- Biblical Studies 2014
- Bloomsbury Open 2013
- Bloomsbury Open 2014
- Bloomsbury Open Archive 2008-2012
- Boston College Open Access Journals
- CARLI SpringerLink Journals
- CCC Get It Now University of Chicago Press
- CCC Get It Now Frontiers in Bioscience
- CCC Get It Now Physicians Postgraduate Press
- CCC Get It Now Natural Products Inc
- Christology Archive 1982-2011
- CIC SpringerLink Journals

- CJTD中國大陸期刊與會議論文
- CJTD中國大陸期刊與會議論文-應用科學
- CJTD中國大陸期刊與會議論文-人文學
- CJTD中國大陸期刊與會議論文-醫學與生命科學
- CJTD中國大陸期刊與會議論文-自然科學
- CJTD中國大陸期刊與會議論文-社會科學
- Christian Doctrines Archive 1988-2013
- Classical Literature Archive 1994-2012
- Classical Studies & Archaeology 2013
- Classical Studies & Archaeology 2014
- Comparative Law, Legal History and Legal Studies
- Competition Law
- Constitutional and Administrative Law
- Contemporary Writing, Theory and Culture Archive 2006-2012
- Continental Philosophy Archive 2000-2012
- Contract, Tort and Restitution
- Corporate and Financial Law
- Criminal Law and Justice
- CRKN SpringerLink Journals
- Drama Online 1: Playtexts and Scholarly Works
- Early Modern History Archive 1971-2013
- EBSCOhost Communication Source
- Education 2013
- Education 2014
- Education Around the World
- Emerald Complete Journals
- Emerald Complete Journals
- Energy, Environmental & Natural Resources Law
- European Law

- Family and Social Law
- Film & Media Studies 2014
- Film Studies Archive 2000-2013
- Finelib SpringerLink Journals
- GNL De Gruyter Online Journals
- GNL De Gruyter Berkeley Journals
- GWLA SpringerLink Journals
- Hart Publishing 2014
- History 2014
- Human Rights Law
- IEEE Xplore POP ALL 1998
- IEEE Xplore POP ALL 2005
- Intellectual Property Law
- International Critical Commentary 1901-2014
- International Law
- International Relations Archive 1998-2013
- JSTOR Arts & Sciences XIV
- Labour & Discrimination Law
- Legal Philosophy
- Linguistics 2013
- Linguistics 2014
- Literary Studies 2013
- Literary Studies 2014
- Litigation & Civil Procedure
- MCLS SpringerLink Journals
- Media Studies Archive 2008-2013
- Medical Law & Ethics
- Medieval History Archive 1981-2013
- Modernism Archive 2005-2012

- Numerique Premium eBooks
- OhioLINK SpringerLink Journals
- Pauline Studies Archive
- Philosophy 2013
- Philosophy 2014
- Philosophy of Education Archive 2008-2012
- Political Theory and Philosophy Archive 1998-2013
- Politics and International Relations 2014
- Politics Archive 1993-2013
- Poyser Monographs
- Religious Studies 2013
- Religious Studies 2014
- Religious Studies Archive 2008-2012
- Second Language Acquisition Archive 2004-2012
- Shakespeare Archive 2003-2012
- Spanish National Consortium SpringerLink Journals
- Springer Protocols
- The Churchill Collection: Published Works of Winston S. Churchill
- The Law of Property and Trusts
- Theology 2013
- Theology 2014
- Wiley Online Library Free 2015
- Wiley Online Library Open Access 2015
- Wiley Online Library Open Access 2015
- Wiley Online Library Pilot 2015

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

Alma Show Me How and Videos

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

Alma Show Me How – May

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 appears.

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

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

   - Share Import Profiles from Network/Community Zone

   The following pop-ups are also available:

   - **New: Specify Requested Media for a Request** (Fulfillment > Fulfillment Configuration > Configuration Menu)
   - **New: Send to Mapping Table** (Fulfillment > Fulfillment Configuration > Configuration Menu > Additional Requested Media)
   - **New: Relink Bibliographic Record to NZ/CZ Record** (search for any electronic portfolio; click **Edit** on the electronic portfolio of your choice)
   - **New: Search PO Line via MMS ID** (Acquisitions > Purchase Order Lines > Search for PO Line)
   - **New: Improvements in EDI Order Fulfillment** (Acquisitions > Acquisitions Infrastructure > Vendors; choose any vendor)

Alma Videos – May

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

- Increased Granularity in Specifying Requested Media
- Return Anywhere
- Contributing Portfolios to the Community Zone
- Relinking Bibliographic Records in the Network Zone or the Community Zone
- Shared Import Profile Templates in the Network Zone
- Enhanced Staff Control on PO Line Inventory Creation
- Shelf-Ready Processing Using EDI
- Centralized Management of Configuration Tables

Particular Issues to Note

The following issue should be noted:

- You can no longer edit Community Zone records from a non-production environment.

Acquisitions

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

Shelf-Ready Processing using EDI

Description

Alma now supports a shelf-ready process by means of an "Order Response" EDI file sent from a vendor. An Order Response contains the status of orders: a list of PO lines and the item-related data to update in Alma (typically bar codes and receiving information). After receiving the Order Response, Alma updates the relevant PO lines.

The vendor EDI Information tab was rearranged to include a new group of fields and some new fields were added to support this. The two new groups are **Incoming** and **Outgoing**. The existing field **Invoices** was renamed **Incoming** and moved to **Incoming**. The existing fields **POs**, **Additional order number**, and **Include fund code** were moved to **Outgoing**.

The new fields in the **Incoming** group are described below in the technical instructions.

Both invoice and Order Response files are processed by Alma after being placed in the directory specified in the field **Input directory**. Both types of files are fetched by the same Alma service.

Technical Instructions

The following role can configure a vendor to support Order Responses:

- Vendor Manager

To configure a vendor to support Order Responses:

1 Follow the steps in the **To configure EDI communication with a vendor** procedure in the **Electronic Data Interchange (EDI)** section of the *Alma Integration with External Systems Guide* or the Alma online help.

2 In step 3 of the procedure, select the following fields, as required:

Field	Description
Shelf Ready Parameters	Indicates that the vendor submits Order Responses. When selected, the fields **Receive Items**, **Keep in Department**, and **Next Step** appear. This field is enabled only if you select **Incoming**. If not selected, Order Responses are still received, but the following parameters are left empty. If there are changes in the item information, such as barcode or policy, these are changed in Alma.
Receive Items	Sets the items specified by an Order Response as received. This updates the item's arrival date to the current date.
Keep in Department	If you selected **Receive Item**, select to indicate that further work is required before the material can be made available in a library. The step specified in **Next Step** is then applied to the item. For more information, see **Receiving Physical Material** in the *Alma Acquisitions Guide* or the Alma online help.
Next Step	The step to apply to items that you keep in the department (see above). For the available options, see **Receiving Physical Material** in the *Alma Acquisitions Guide* or the Alma online help.

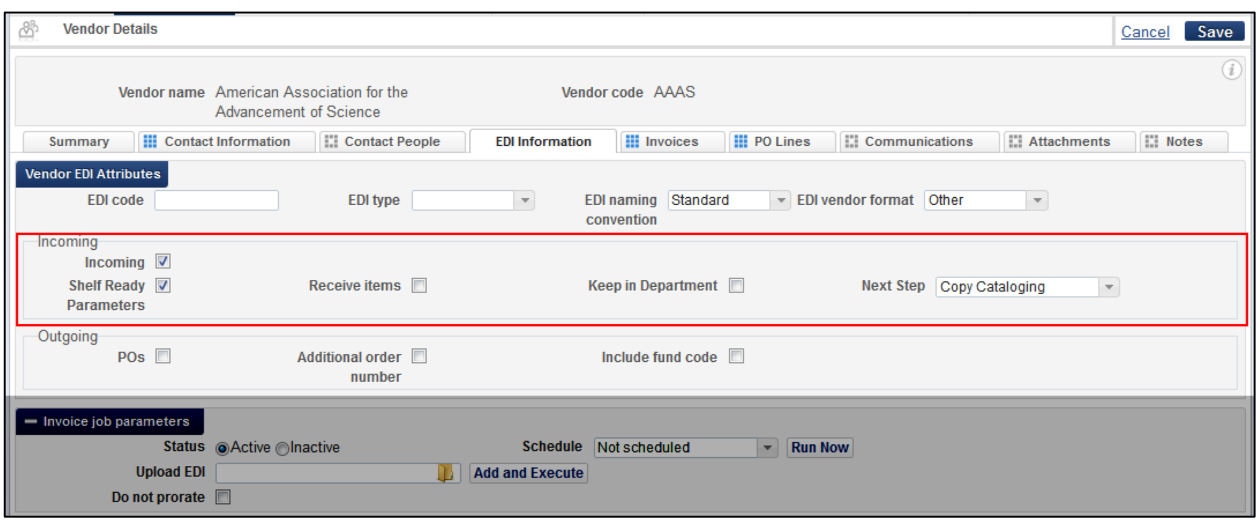


Figure 1 – Setting Up EDI for Order Responses

3 Continue with configuring EDI communication.

Enhanced Staff Control of PO Line Inventory Creation

Description

Alma now supports creating many kinds of PO lines without also automatically creating new inventory for them. Instead, you add existing inventory to the PO line manually. This feature is useful where, for example:

- You have migrated many inventory records and want to create the PO lines for them.
- You want to switch suppliers for a standing order.

A new check box, **Assign Inventory Manually**, was added to the PO Line Owner and Type page. If this check box is selected when creating the PO line, Alma does not create an inventory item for the order.

You must add an inventory item to the PO line before it can proceed to packaging.

Technical Instructions

The following roles can use the PO line manual inventory assignment mode and are the same ones that create PO lines in general:

- Purchasing Manager
- Purchasing Operator

To create PO lines without automatically creating new inventory:

1. Start creating a PO line manually, as described in the procedure **To create a PO line** in the **Manually Creating a PO Line** section of the *Alma Acquisitions Guide* or the Alma online help. Continue until after you select the purchase type, as described in step 3 of that procedure.

   In short, the procedure up to selecting the purchase type is as follows:

   a. On the Repository Search page (**Resource Management** > **Repository Search**), locate the titles for which you want to create a PO line.

   b. Scroll to the title for which you want to create a PO line and click the **Order** link beneath the title. The PO Line Owner and Type page opens.

   c. From the **Purchase type** drop-down list, select the type of item for which you want to create a PO line.

After you select the purchase type, the check box **Assign Inventory Manually** appears on the page. This check box does not appear if you select any order for which Alma does not automatically create an inventory item: a standing order (except for **Physical – Standing Order Non Monograph**), any service, or the options **Digital – Non Archiving** or **Physical – Archiving**.

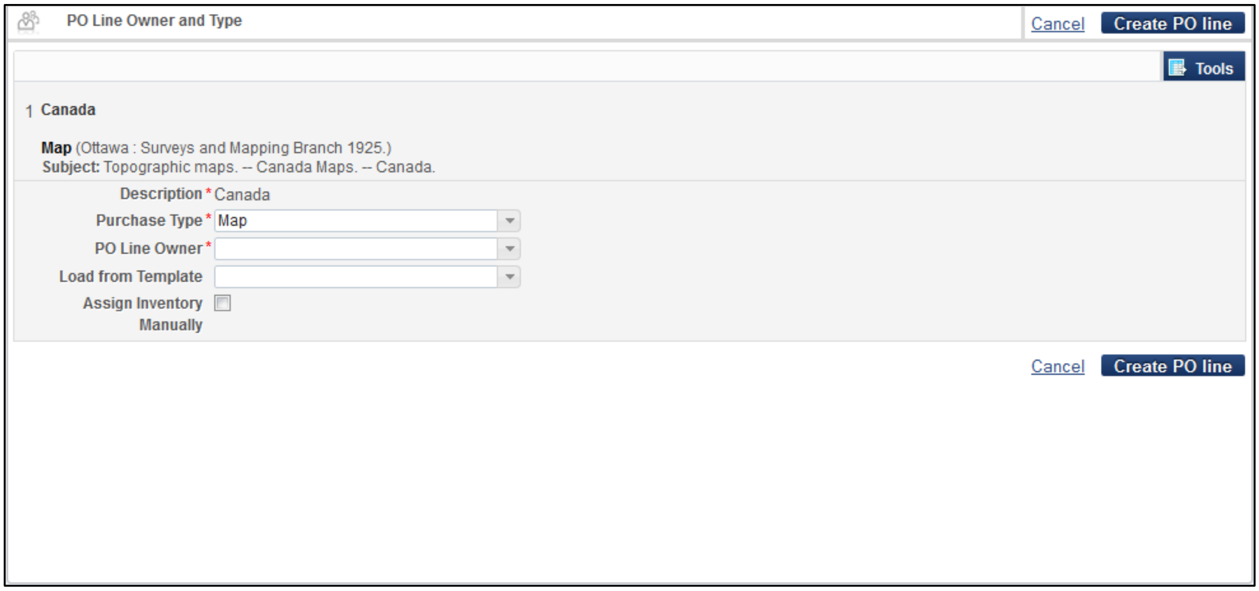


Figure 2 – Order without Inventory

2 Select **Assign Inventory Manually**.

3 Continue creating the PO line, continuing from step 4 of the procedure.

The PO line is created, but new inventory is not created. You must add inventory manually to the PO line before the PO line can proceed to packaging

- For electronic orders, you add the inventory when you edit the **PO Line** field in the Electronic Portfolio Editor. For more information, see the **Adding Multiple Electronic Resources to a PO Line Using the Electronic Portfolio Editor** section of the *Alma Resource Management Guide* or the Alma online help.
- For physical continuous orders, you add the inventory when you associate a PO line with a holding while viewing the list of holdings. For more information, see the **Using the List of Holdings** section of the *Alma Resource Management Guide* or the Alma online help.
- For physical orders, you add the inventory when you edit the **PO Line** field in the Physical Item Editor. For more information, see the **Using the Item-Level Information** section of the *Alma Resource Management Guide* or the Alma online help.

Searching for PO Line by MMS ID

Description

Ex Libris is continually improving Alma's search capabilities. This new feature provides you with the means to search PO lines using the MMS ID of its associated bibliographic record. A PO line search over all fields now includes the MMS ID field, as well. For more information, see the **Searching for PO Lines** section of the *Alma Acquisitions Guide* or the Alma online help.

You can search for PO lines by MMS ID of bibliographic records in the Network Zone if the PO line links to a cached version of the Network Zone's bibliographic record.

The MMS ID appears in the PO line list. If the PO line links to a Central Knowledge Base (CKB) ID, this also appears in the PO line list.

Technical Instructions

To search for PO lines by MMS ID:

1 Open the Search for PO Line page (**Acquisitions** > **Purchase Order Lines** > **Search for PO Line**).

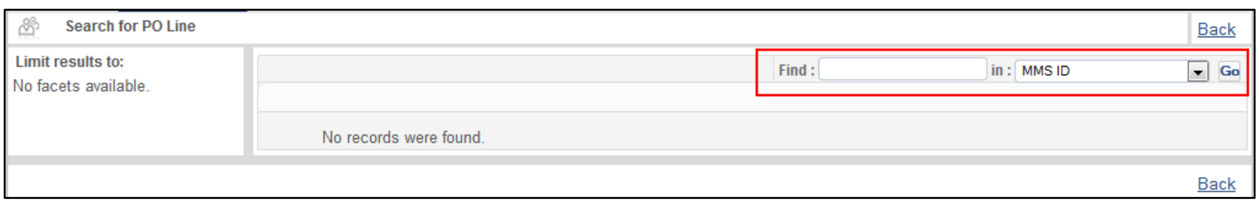


Figure 3 - Search PO Lines by MMS ID

2 In **Find**, enter the MMS ID.

3 In **In**, select **MMS ID**.

4 Click **Go**. The results appear on the Search for PO Line page.

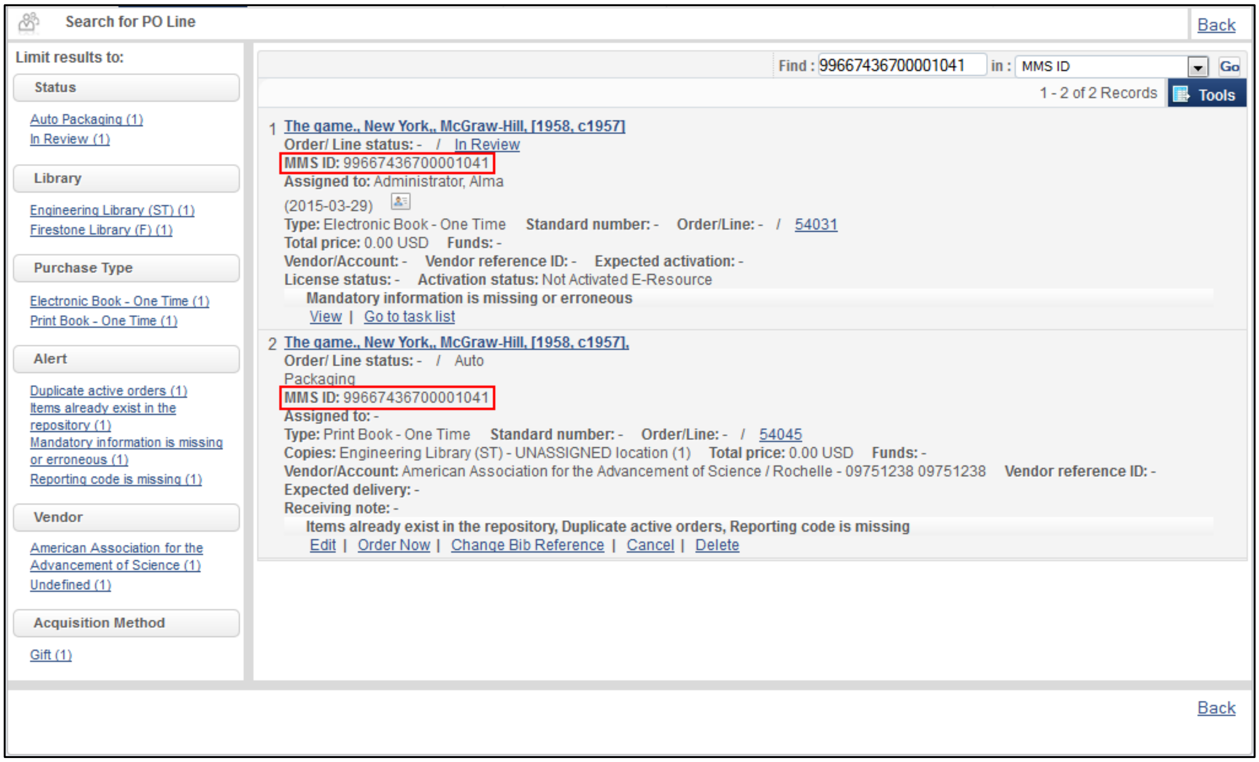


Figure 4 - PO Lines List with MMS IDs

To search for PO lines by MMS ID of bibliographic records in the Network Zone:

1. Use the repository search to search for the relevant bibliographic record.
2. Click the **Network** tab on the results page. Locate the relevant bibliographic record.

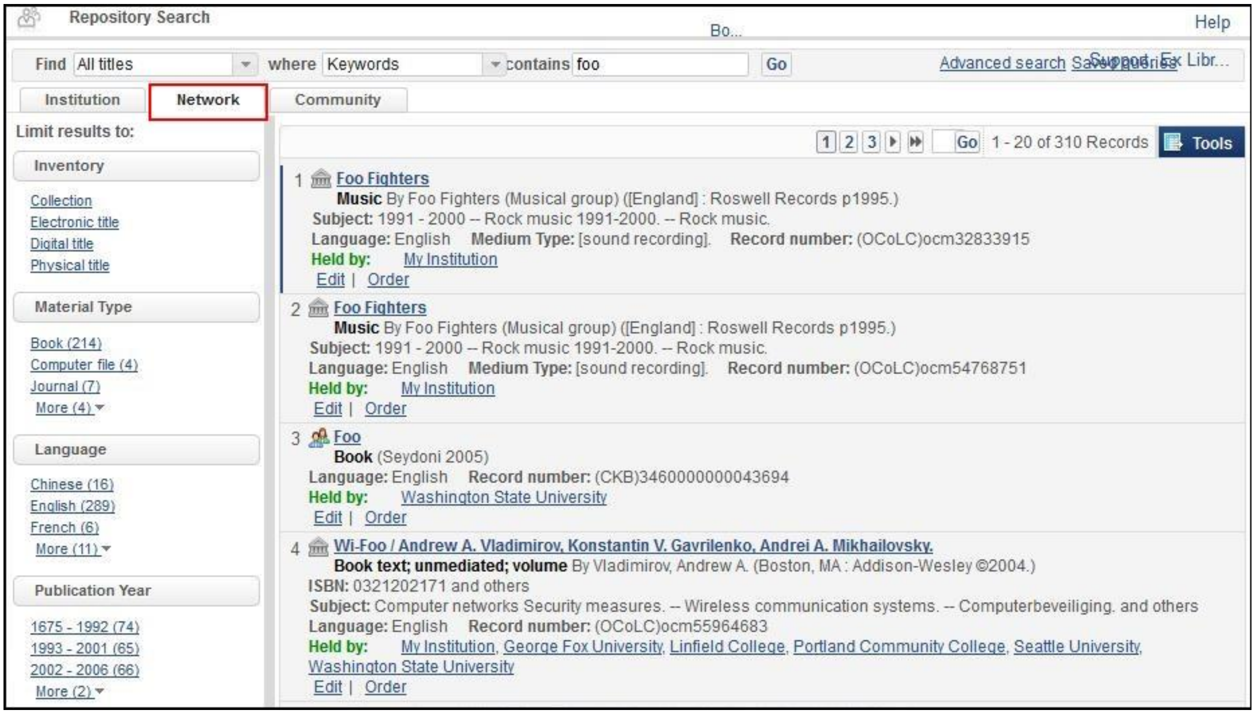


Figure 5: Network Zone Search Results

3 Click the title of the relevant bibliographic record. The MARC Record Single View screen appears. The MMS ID appears in the record information at the top of the page. Use this ID to find the related PO lines that link to this bibliographic record.

Figure 6: MMS ID in Network Zone Record

Other Alma Acquisitions Updates

- The customer parameter **distribute_acquisition_changes_last_run** (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**) was renamed **acq_distribute_changes_last_run**, and the customer parameter **acquisition_distribution_job** was renamed **acq_distribution_job**, so that they appear next to each other in the list of parameters.

- **Vendor account** is no longer a field in an Update Inventory import profile (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**, select an Update Inventory import profile).

Resource Management

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

Contributing Portfolios to the Community Zone

Description

This new functionality continues the development effort of opening up the Alma Community Zone for contributions. With this new capability, when you encounter wrong information on the portfolio level, you can correct the information and share the correction with the entire community. In addition, you can contribute new portfolios to existing selected electronic collections.

Contributions can be made to the following electronic collections:

- Free E- Journals
- Miscellaneous E-Journals
- Miscellaneous Free E-Books
- U.S. Government Documents

Note: Refer to the Known Issues section for an item that is related to this new feature.

Technical Instructions

The following role can contribute to electronic collections:

- Electronic Inventory Operator

To contribute electronic portfolios to the Community Zone:

1. After completing a search for one of the following electronic collections that contains the portfolio to be contributed to the Community Zone, open the **Portfolios** tab on the Electronic Service Editor page:
   - Free E- Journals
   - Miscellaneous E-Journals
   - Miscellaneous Free E-Books
   - U.S. Government Documents

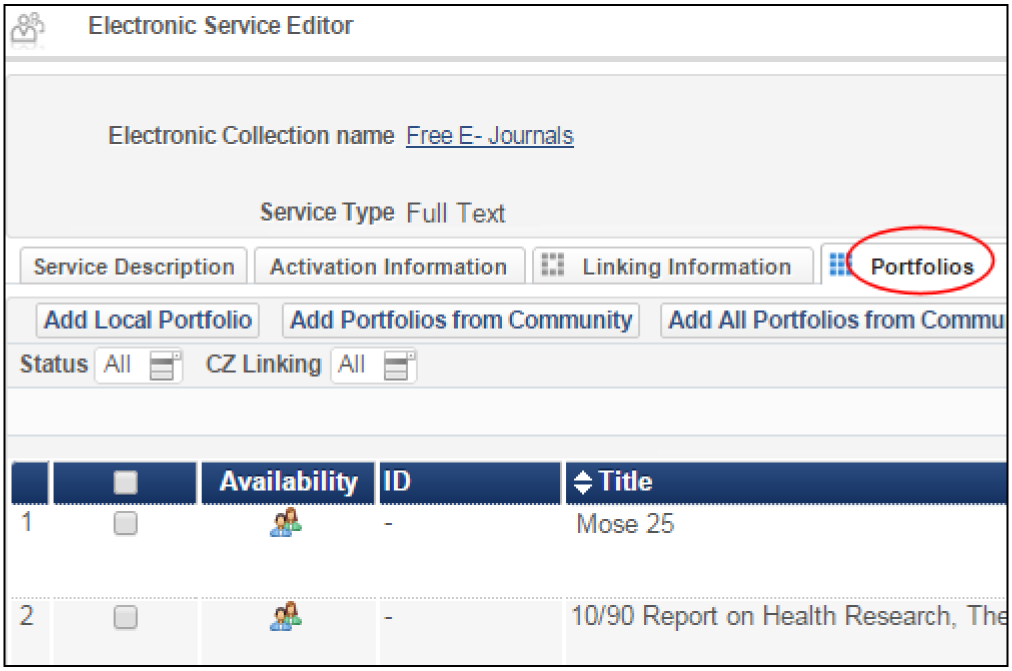


Figure 7 - Portfolios Tab

You can also dynamically add a local portfolio using the **Add Local Portfolio** button on the **Portfolios** tab and, subsequently, contribute that portfolio to the Community Zone.

New portfolios that are contributed must contain a URL.

2 For the portfolio that you want to contribute to the Community Zone, select **Actions > Contribute**.

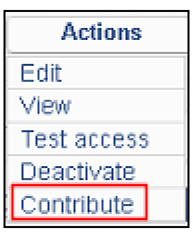
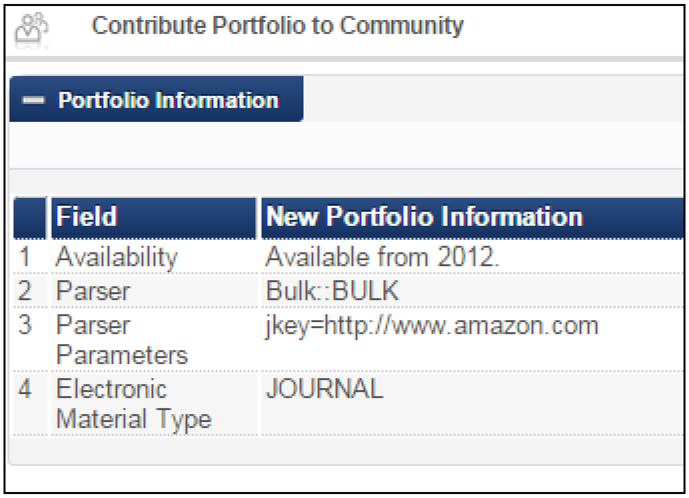


Figure 8 - Contribute Action

The Contribute Portfolio to Community page opens.

In the **Portfolio Information** section on the Contribute Portfolio to Community page, Alma lists the portfolio information to be contributed.



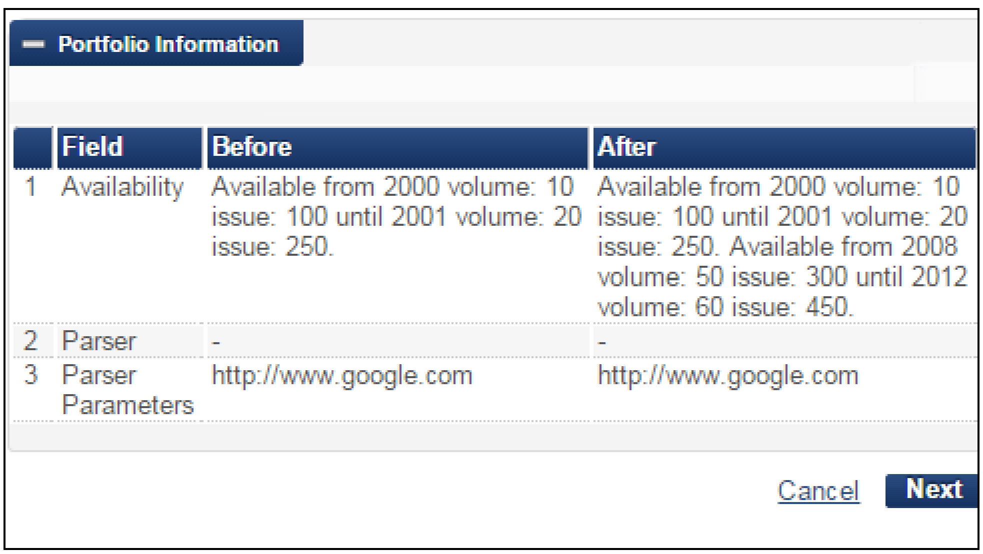
Contribute Portfolio to Community

Portfolio Information

	Field	New Portfolio Information
1	Availability	Available from 2012.
2	Parser	Bulk::BULK
3	Parser Parameters	jkey=http://www.amazon.com
4	Electronic Material Type	JOURNAL

Figure 9 - Portfolio Information

If the contribution that you are making is an updated portfolio (not a new portfolio) that is already a part of the electronic collection, the before and after content appears in the Portfolio Information section, as shown in the illustration below.



Portfolio Information

	Field	Before	After
1	Availability	Available from 2000 volume: 10 issue: 100 until 2001 volume: 20 issue: 250.	Available from 2000 volume: 10 issue: 100 until 2001 volume: 20 issue: 250. Available from 2008 volume: 50 issue: 300 until 2012 volume: 60 issue: 450.
2	Parser	-	-
3	Parser Parameters	http://www.google.com	http://www.google.com

Cancel Next

Figure 10 - Before/After Portfolio Information

For updated portfolios (when you click **Contribute** for a global portfolio), the portfolio must contain at least one change in information, such as URL or coverage fields.

When determining the coverage/availability that is to be contributed to the Community Zone for a portfolio, the system first looks at the **Which coverage statement will be applied?** setting. If a portfolio has both local and global coverage, but **Only local** is selected, only the local coverage is contributed and it will override the global coverage of the portfolio in the Community Zone. If a portfolio's setting is **Only global**, the local coverage is not contributed and the global coverage will override the local coverage of the portfolio in the Community Zone. If a portfolio's setting is **Global or local** or **Global and local**, all coverage is contributed to the Community Zone.

Refer to the illustration below and the **Modifying a Portfolio Using the Electronic Portfolio Editor** section in the Alma online help/*Resource Management Guide* for more information about this setting.

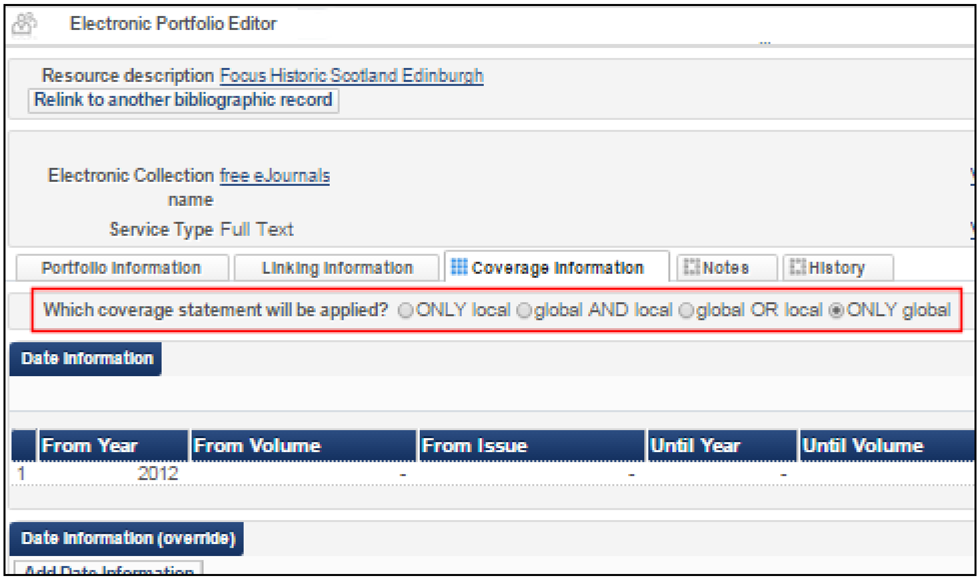


Figure 11 - Coverage Statement Setting

3 Click **Next**.

When you contribute new portfolios, Alma attempts to match the bibliographic record that is associated with the portfolio to the bibliographic records in the Community Zone. In cases where multiple matches are found, Alma displays the potential matches and provides you the option to select the correct Community Zone bibliographic record.

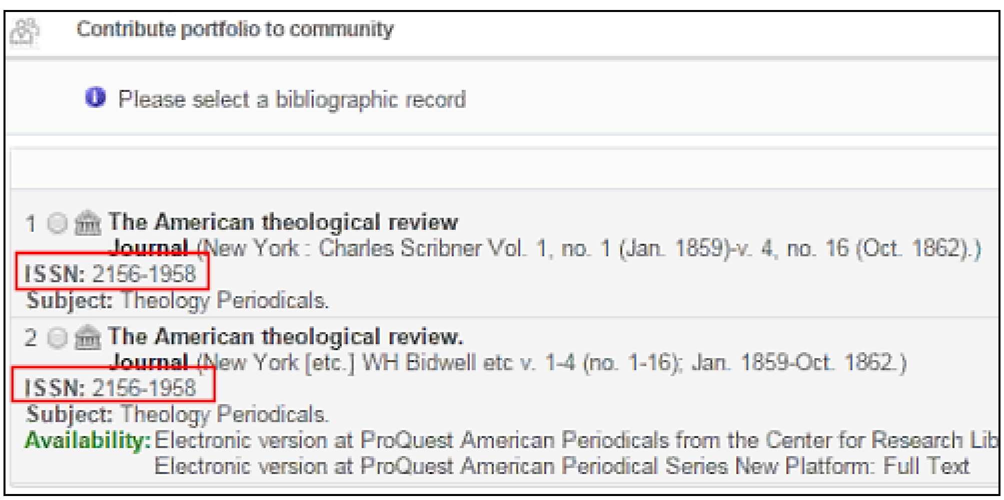


Figure 12 - Multiple Matching Bibliographic Records

a Select the preferred record and click **Next**.

b In the **Bibliographic Record Handle Policy** section, select one of the following:

- Use descriptive metadata from the community

  Select this option in order to associate the portfolio with the matched Community Zone bibliographic record.

- Keep local descriptive metadata

  When selecting this option, the bibliographic record associated with the portfolio in the Community Zone is the matched Community Zone bibliographic record, but the bibliographic record associated with the portfolio in the contributor's environment remains local. This option is available for those institutions that want to contribute only the portfolio and not the bibliographic record.

- Merge descriptive metadata

  Select this option to merge the local bibliographic record and the matched bibliographic record in the Community Zone. The merge is handled by adding new fields (not overlaying or removing fields).

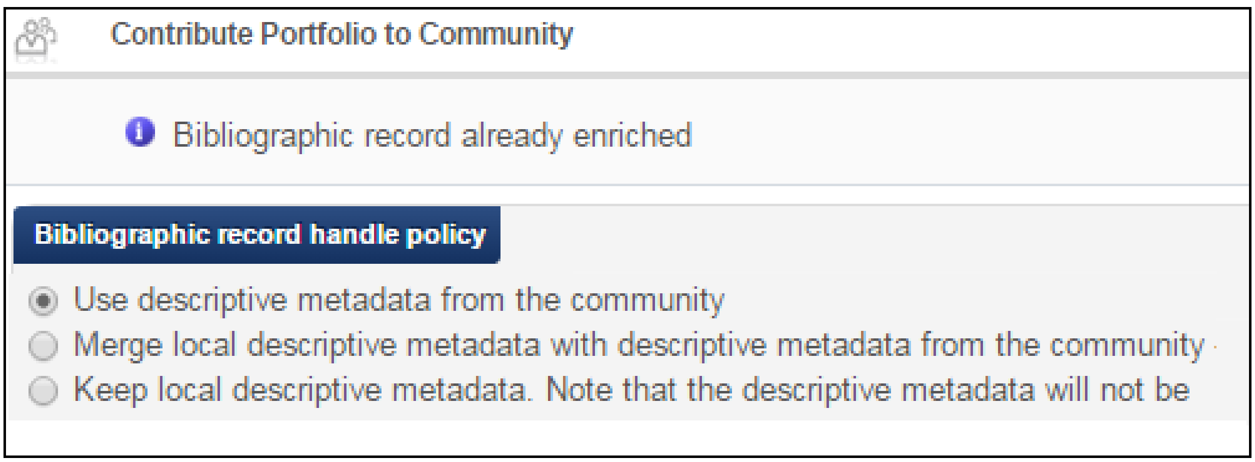


Figure 13 - Bibliographic Recording Handling Options During Contribution

4 Click **Next**.

The **Contribute Portfolio Summary** section appears. The information provided in this section varies depending on what changes occur or are selected during the contribution process.

Figure 14 - Contribute Portfolio Summary Section – Example 1

The *Local Fields will be removed* summary comment means that local linking fields will turn into community fields and that propriety local fields such as PO line license and so forth will remain local and will not be contributed.

Figure 15 - Contribute Portfolio Summary Section – Example 2

5 Click **Contribute**.

After the portfolio contribution is completed, the **Availability** icon for the portfolio changes from the local icon to the community icon ( ) in the **Availability** column.

Enhancements to the Electronic Portfolio Export

Description

The Extended Export function for electronic portfolios was enhanced to expose PO line details to enable better management of resources. Specifically, the enhanced file contains the following new columns of information:

- Collection License (ID)
- Collection License Name
- PO Line (from the portfolio, if it exists, or, otherwise, from the collection)

These columns are for information purposes only and not available for use in record imports.

Technical Instructions

All roles can access repository search and the Extended Export function.

To view the Extended Export column changes:

1. Complete an electronic collection search.
2. Click the **Portfolio List (number)** link in the search results for the electronic collection you want to export.

Figure 16 - Portfolio List Results Link

The portfolio list page opens.

3. Select **Tools > Extended Export**.

The portfolio list appears in Excel format.

4. Scroll to the right to locate the new column headings.

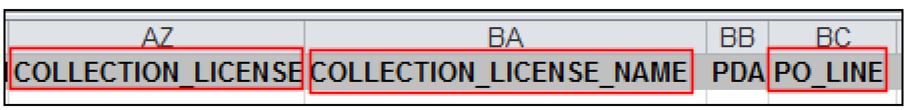


Figure 17 - New Collection License, Collection License Name, and PO Line Column Headings

Metadata Prefix Added to Remote Repository

Description

When importing remote digital representations for digital titles in Alma, it is necessary to indicate the metadata prefix for the OAI base URL. It is now possible to configure a default metadata prefix for an OAI base URL that is used automatically when you add a single remote digital representation or create an import profile that uses the OAI import protocol. Configuring a default metadata prefix makes configuring the import profile easier, as typically the metadata prefix 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 metadata prefix:

- Cataloging Administrator

- General System Administrator

To configure a default metadata prefix:

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 appears.

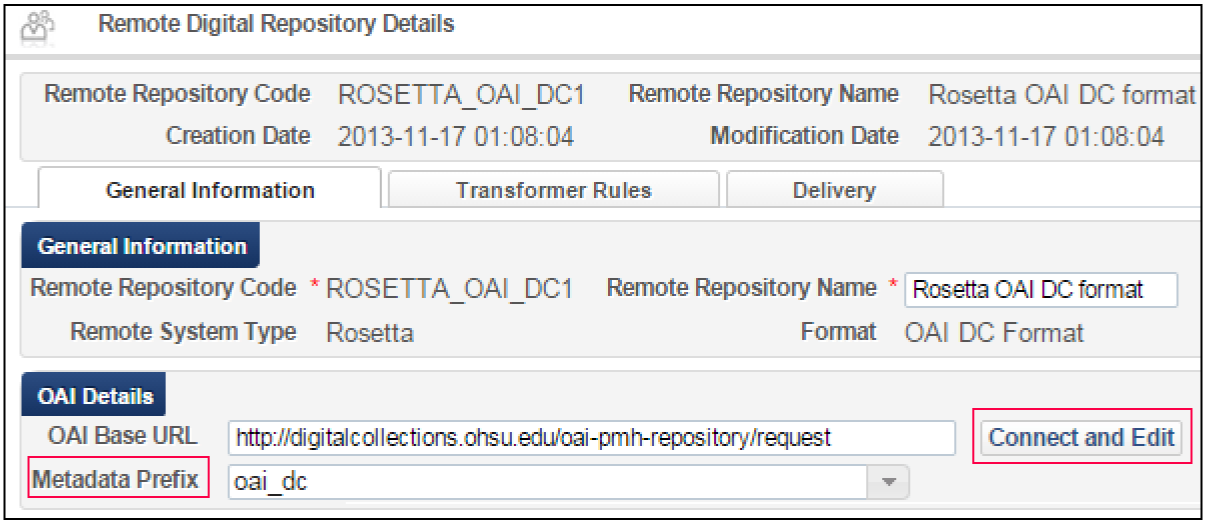


Figure 18 – Metadata Prefix

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 **Connect and Edit**. The **Metadata prefix** drop-down list appears.
5. Select a metadata prefix to be used as the default for the remote repository.
6. 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 metadata prefix is automatically filled in.

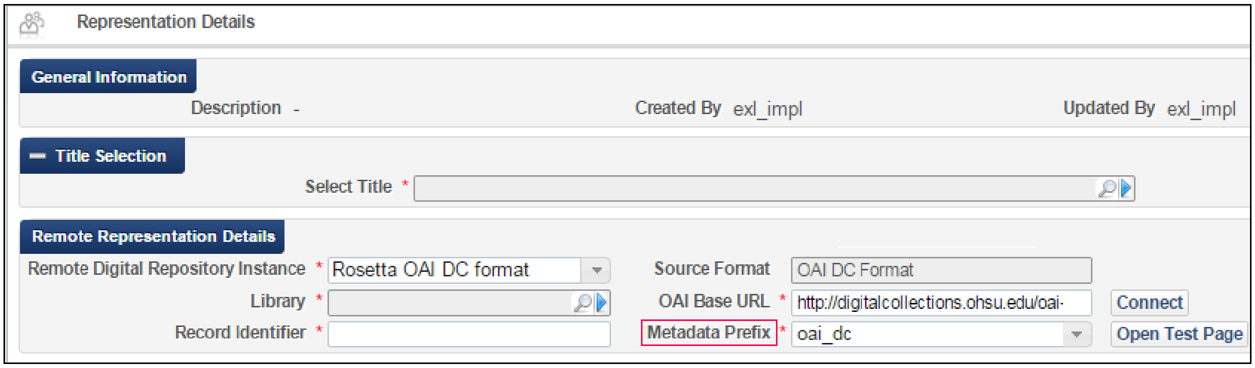


Figure 19 – Representation Details

Additional Fields for Serial-Related Items

Description

The following serial-related fields were added for physical items:

- General Information tab
  - Issue Date
- Summary tab
  - Holdings ID
- ENUM/CHRON Information tab
  - Type of Unit
  - Break Indicator (under development for the June release)
  - Pattern Type
  - Linking Number

These informational fields were added in order to support the serial prediction pattern capability in Alma and the automatic generation of summary holdings (which will be introduced in a later release). The content for these fields is derived from migrating data from a pre-existing ILS system or opening prediction pattern items with the Alma prediction pattern capability.

Technical Instructions

All roles can view the serial-related fields that were added.

To view the serial-related fields added:

1. Complete a **Physical items** repository search (**Resource Management > Search and Sets > Repository Search**) for a serial.
2. Click the **Edit** link for the serial you want to view. The **General Information** tab of the Physical Item Editor page opens with the new **Issue date** field. The **Issue date** field contains the issue date generated from a prediction pattern.

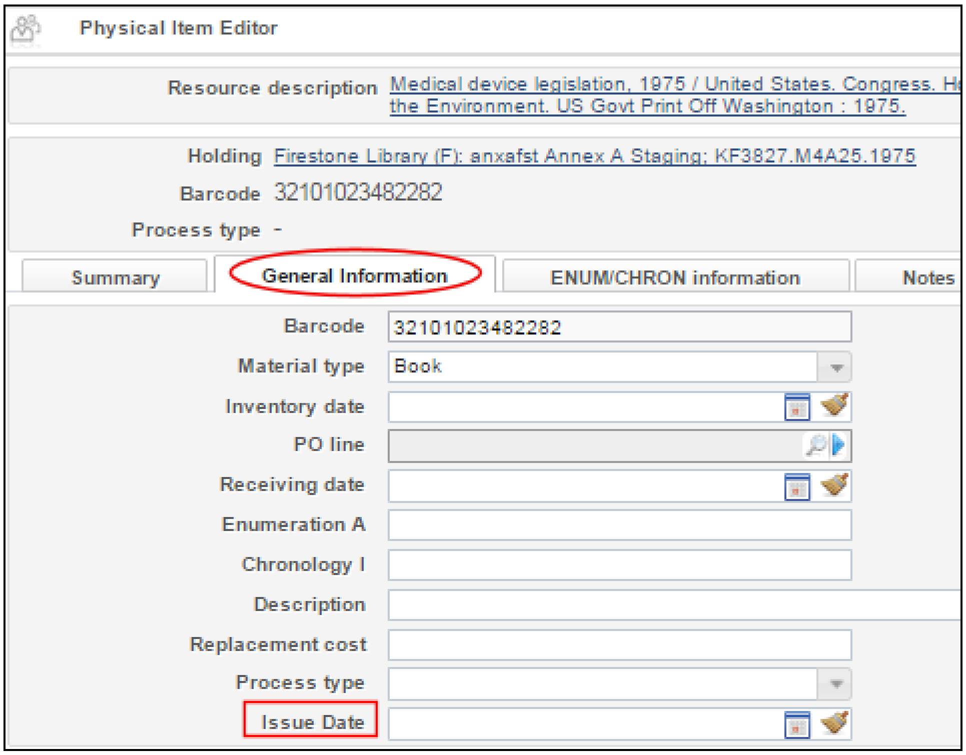


Figure 20 - Physical Item Serial-Related Fields – General Information Tab

3. Select the **Summary** tab. The new **Holdings ID** field appears in the **Summary** tab.

Figure 21 - Physical Item Serial-Related Fields – Summary Information Tab

4 Select the **ENUM/CHRON Information** tab.

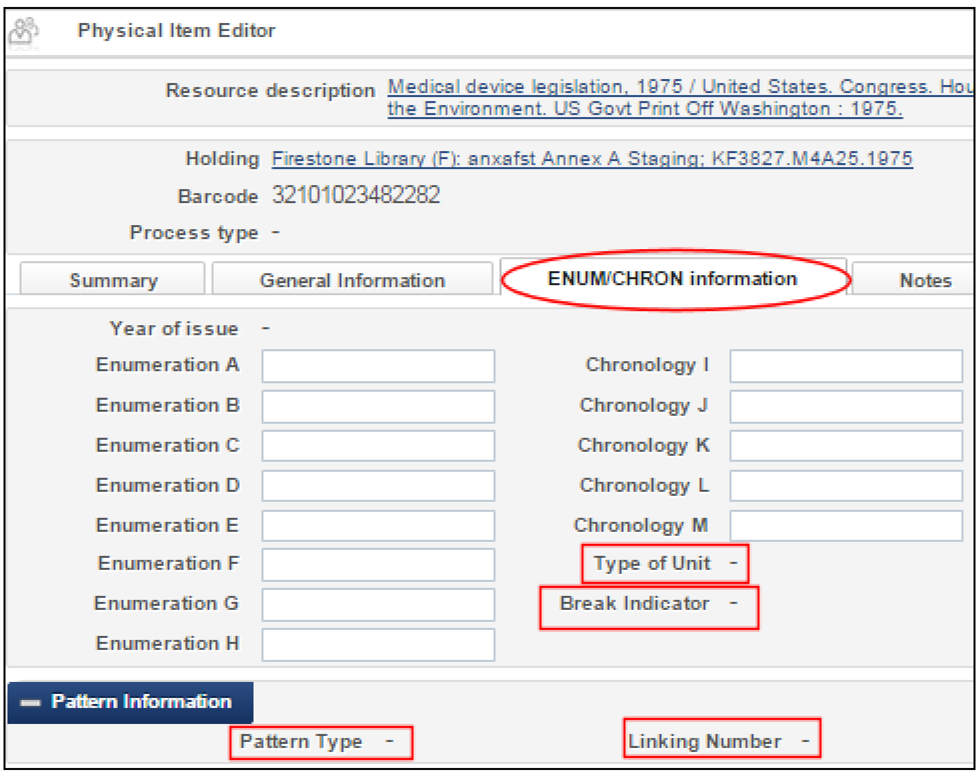


Figure 22 - Physical Item Serial-Related Fields – ENUM/CHRON Information Tab

The following new fields appear in the **ENUM/CHRON Information** tab:

- Type of unit – Under development for the June release.
- Break indicator – Under development for the June release.
- Pattern type – This field contains 3, 4, or 5 to identify which 85X holdings field (853, 854, or 855) is related.

- Linking number – This field contains the linking number portion of $8 of the related holdings field's 853, 854, or 855, which is **<linking number>**.<sequence number>\<field link type>. For example, $8**1**.3\a.

Shared Import Profile Templates in the Community Zone

Description

In order to simplify the integration process between Alma and different vendors for repository, EOD, and shelf-ready workflows, the Community Zone will now include import profile templates for different vendors. Templates will include the recommended configuration that is needed in order to implement the desired workflow with a specific vendor.

A library working with the vendor can copy the template over to the library environment, make small adjustments that are specific to the library environment and start testing the integration with the vendor.

This release includes templates for integrating with Dawson, and General templates for other vendors.

If you would like to share your import profile configuration with the community, open a Salesforce case; and someone from Ex Libris will contact you.

Technical Instructions

The following role can work with import profiles:

- Catalog Administrator

To copy a Community Zone import profile template:

1. On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Import Profiles** under **Record Import**.
2. Select the **Community** tab.

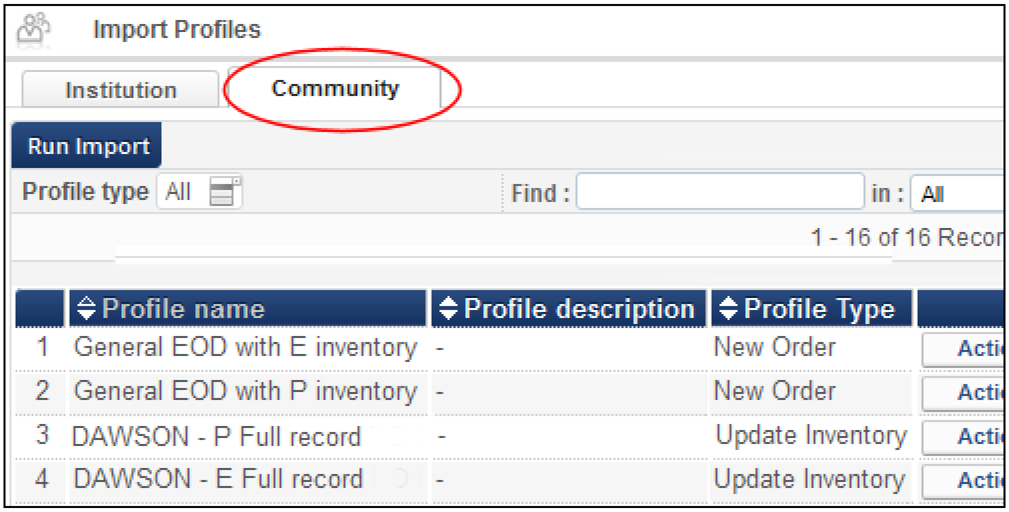


Figure 23 - Import Profiles Page Community Tab

The templates in the Community tab are managed (added/deleted/updated) by Ex Libris. The following templates are provided:

- Update Inventory profile type:
  - DAWSON - E Full record
  - DAWSON - P Full record

  Refer to Dawson Shelf Ready Best Practices for more information.

- New Order profile type:
  - General EOD with E inventory
  - General EOD with P inventory

3. Select **Actions > Copy** in the row of the template with which you want to work. The **Profile Details** tab opens on the Import Profile Details page.

4. Edit the import profile details to match your requirements. Refer to the **Creating the Profile Using the Wizard** section in the *Alma Resource Management Guide* or Alma online help for information regarding the import profile parameters and options.

5. When you have completed your import profile changes, click **Save**.

6. Select the **Institution** tab to view the profile that you copied. By default, the copied profile has **copied from** information appended to the profile name.

Other Resource Management Enhancements

- The file format for the Extended Export files for electronic portfolios was enhanced in the following manner to align its format with the standard Excel format and reduce the amount of manual formatting:
  - Enhanced formatting of the header row using bold characters and background color for easier visibility
  - Enhanced date columns (such as the Activation Date column) that can now be sorted as a date (not just a string of text) using the Excel Sort & Filter options
- A full re-indexing of the Alma repository (not including authority records) was completed.
- Global portfolios deleted in the Community Zone now become local and deactivated (as opposed to local and active, as they previously were).
- In the **Series** line of the repository search (Look Ahead), the 4XX fields and the 830 fields are now separated by space-semicolon-space - " ; " - rather than by a single space.
- **Publish Bibliographic Record** is now the default value for the Publish to external catalog (OCLC) management tag in the following scenarios:
  - MD Editor (new bib, copy cataloging)
  - Quick cataloging (new item, new portfolio, fulfillment citation screen)
  - Order a bib from Community Zone
  - Simple view - copy to catalog / link
- New originating systems were added, disabled by default. You can add the new values from **Resource Configuration > Configuration Menu > Record Import > Originating Systems for MD Records**.
- Only the Public Name (without its title) of a collection is now presented to Primo. This was done to prevent the appearance of duplications when the title and public name are the same.

Fulfillment

The following are the enhancements to the Fulfillment functional area in the May 2015 release of Alma.

Return Anywhere

Description

Alma can now be configured to allow patrons to return items to any member of a fulfilment network, regardless of the institution from which you checked out the item. For example, if University A and University B are members of the same fulfillment network, a patron can check out a book at University A and check it in at University B.

New fields were added on pages handling returns.

A new check box, **Item from another institution**, appears only if the institution is a member of a fulfillment network and has a Circulate For relationship with another member of the network. During a return, if this field is selected, a drop-down list **Institution** appears, allowing you to select the item's originating institution. The returned item is sent to the originating institution and marked as **In Transit**.

Technical Instructions

The following roles can use Return Anywhere and are the same ones that manage returns in general:

- Circulation Desk Manager (logged in to a circulation desk)
- Circulation Desk Operator (logged in to a circulation desk)

To return an item at a different institution than the one from which you checked it out:

Note: Before using this feature, ensure that Ex Libris Support has set up a "Circulate For" relationship between all relevant institutions.

1. Start your return, as described in **Returning Items** in the *Alma Fulfillment Guide* or the Alma online help.
2. Before scanning or entering the bar code (step 2), select **Item from another institution**. The **Institution** drop-down list appears.
3. Select the item's originating institution.

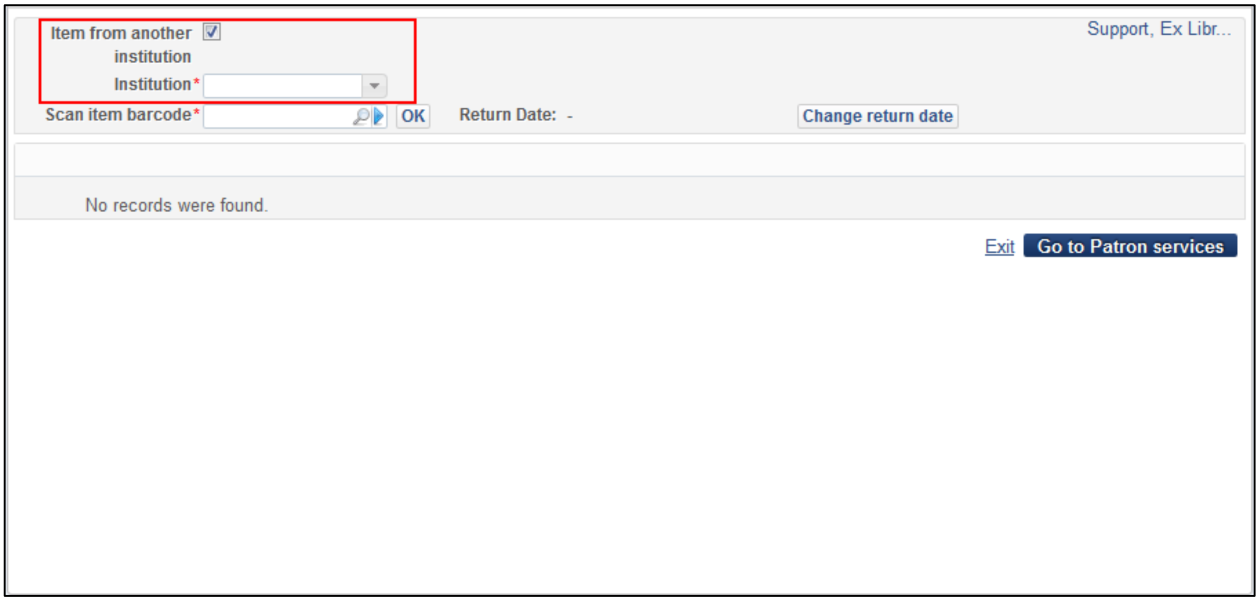


Figure 24 – Return Anywhere

4 Continue with your return (step 2). When the return is entered, a transit slip is printed at the institution accepting the return. The returned item is sent to the originating institution and marked as **In Transit**.

Other Fulfillment Enhancements

- The name of the Move Physical Items job was changed to **Create Physical Item Move Requests**.
- A new customer parameter **return_lost_loan_from_self_check** (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) was added. Its default value is **True**. If **False**, and a check-in message is sent to Alma for an item that is currently declared lost, the return action is blocked and a message is displayed to the patron, directing him or her to a circulation desk.
- A new element, **optional_barcodes**, was added to the Ful Resource Request Slip Letter XML. The element holds a list of all barcodes that may fulfill this request.
- On the page that appears when selecting the **Work Order** option for a physical item, some labels were changed:
  - The title was changed from Create Request to **Place Item in Process**.
  - Request/Process Type was changed to **Process Type**.
  - Target Destination was changed to **Managing Department**.

- Some labels on the page **Fulfillment > Resource Requests > Manage In Process Items** were changed:
  - The titles were changed from Items in Department and Items in Local Department to **In Process Items**.
  - The Filter filter name was changed to **Process status**.
  - When editing a work order on this page (**Actions > Edit**), the Request Management tab was changed to **In Process Items** and Request Note was changed to **Process Note**.
- **Available For** was removed from the Edit Access Right page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Access Rights**).
- If patron notifications are printed to a local printer (for example, loan receipts, return receipts, or lost loan notifications), they are printed in the patron-defined language.

Resource Sharing

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

Increased Granularity in Specifying Requested Media

Description

Currently, patrons can select whether they want to receive requested resources in digital or in physical format. This feature expands the resource granularity, enabling a digital request to be requested as an audio or visual file, or a physical request to be requested as a book or a CD. When patrons specify the exact format in which the resource is required, the lending library processes the request in the requested format.

Configuring requested media is done on the following pages:

- **Additional Requested Media Code Table** — Enables configuring the allowed requestable media types, in addition to the out-of-the-box options.
- **Requested Media Definition Mapping Table** — Enables defining attributes pertaining to the added requestable media types and the out-of-the-box media types.

Technical Instructions

The following roles can configure the requestable media types:

- General System Administrator
- Fulfillment Administrator

The following roles can specify a request’s required media type:

- Fulfillment Services Operator
- Fulfillment Services Manager

To configure the requestable media types for resource sharing requests:

1 Open the Additional Requested Media Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Additional Requested Media**).

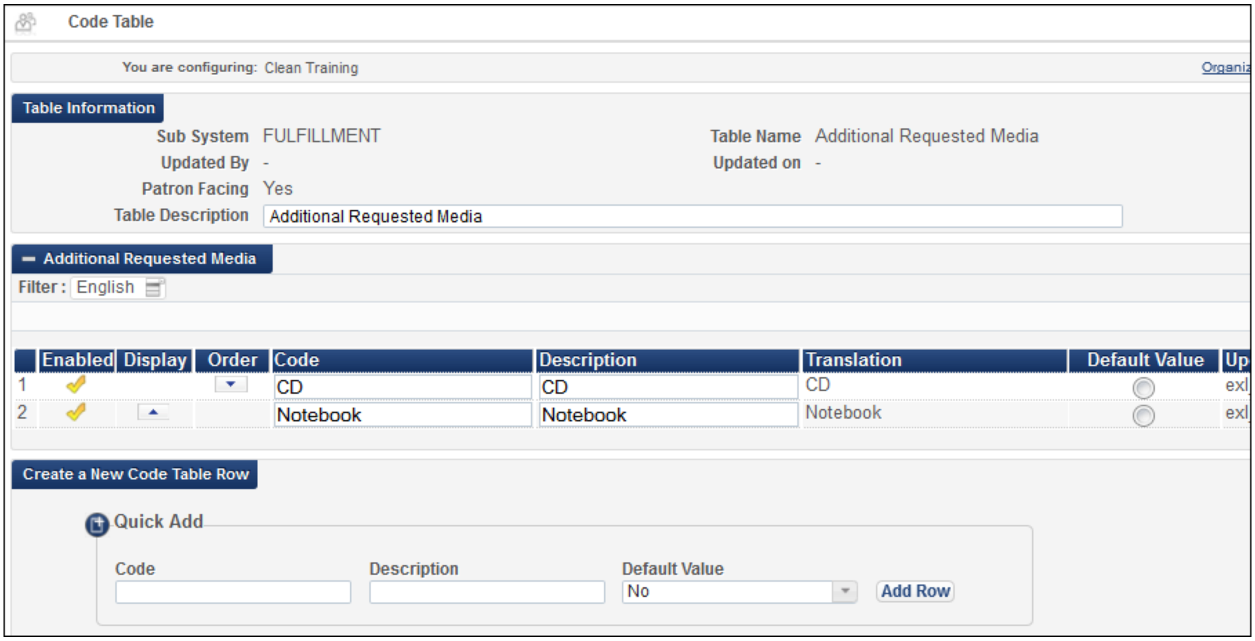


Figure 25 – Additional Requested Media Code Table Page

2 In the Create a New Code Table Row section, enter a **Code** and **Description** for the media type you want to add, and click **Add Row**. The media type appears in the table in the Additional Requested Media section.

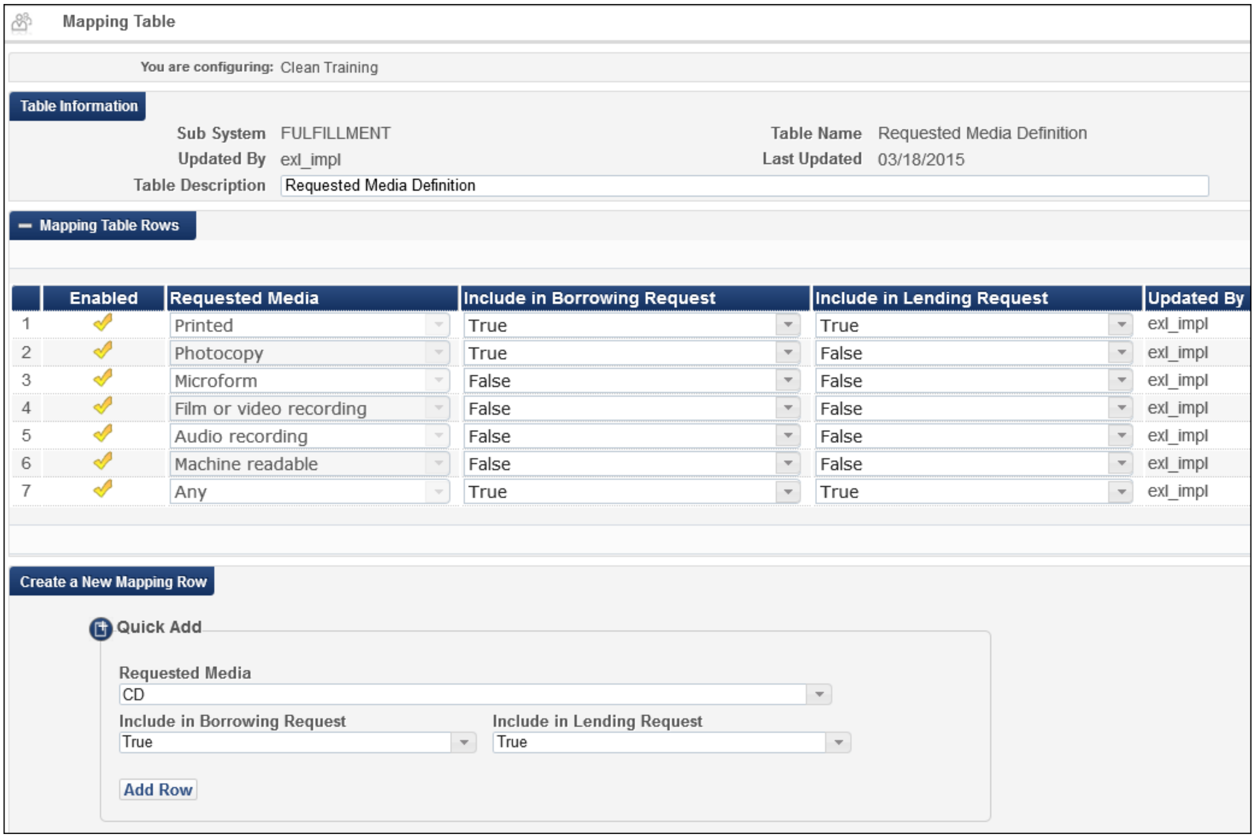
3 Click **Save**. The configured media types can be added as available media on the Requested Media Definition Mapping Table page (see the following procedure).

To specify media types to be available when submitting a resource sharing request:

1 Open the Requested Media Definition Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Requested Media Definition**). The default requested media types appear, as follows:

- Printed
- Photocopy
- Microform
- Film or video recording
- Audio recording

- Machine readable
- Any



Mapping Table

You are configuring: Clean Training

Table Information

Sub System FULFILLMENT | Table Name Requested Media Definition

Updated By exl_impl | Last Updated 03/18/2015

Table Description Requested Media Definition

Mapping Table Rows

	Enabled	Requested Media	Include in Borrowing Request	Include in Lending Request	Updated By
1	✓	Printed	True	True	exl_impl
2	✓	Photocopy	True	False	exl_impl
3	✓	Microform	False	False	exl_impl
4	✓	Film or video recording	False	False	exl_impl
5	✓	Audio recording	False	False	exl_impl
6	✓	Machine readable	False	False	exl_impl
7	✓	Any	True	True	exl_impl

Create a New Mapping Row

Quick Add

Requested Media: CD

Include in Borrowing Request: True

Include in Lending Request: True

Add Row

Figure 26 – Requested Media Definition Mapping Table Page

2 In the **Create a New Mapping Row** section, you can add the additional media types that were configured on the Additional Requested Media Code Table page (see the previous procedure), as follows:

   a In the **Requested Media** field, select a media type. The available types are those configured on the Additional Requested Media Code Table page.

   b In the **Include in Borrowing Request** field, select whether the media type is to be available when submitting resource sharing borrowing requests.

   c In the **Include in Lending Request** field, select whether the media type is to be available when submitting resource sharing lending requests.

   d Click **Add Row**. The specified media type appears in the **Mapping Table Rows** table.

3 In the **Mapping Table Rows** table, select **True** or **False** in the **Include in Borrowing Request** and **Include in Lending Request** columns to indicate whether the specified media type is to be available when submitting borrowing requests or lending requests, respectively.

Note: The **Any** media type must always be specified **True** for both borrowing and lending requests.

4 Optionally, click **Delete** to delete a media type added from the Quick Add section. You cannot delete the default media types.

To view configured media types when submitting a resource sharing request:

1 On the Resource Sharing Lending Requests Task List (**Fulfillment > Resource Sharing > Lending Requests**) or Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Add** and select either **Manually** or **From Search**.

2 In the **Request Attribute** section at the bottom of the page, locate the **Requested Media** field, and select the type of media in which you want the request to be supplied. The values that appear in the drop-down field are those configured on the Requested Media Definition Mapping Table page (see the previous procedure).

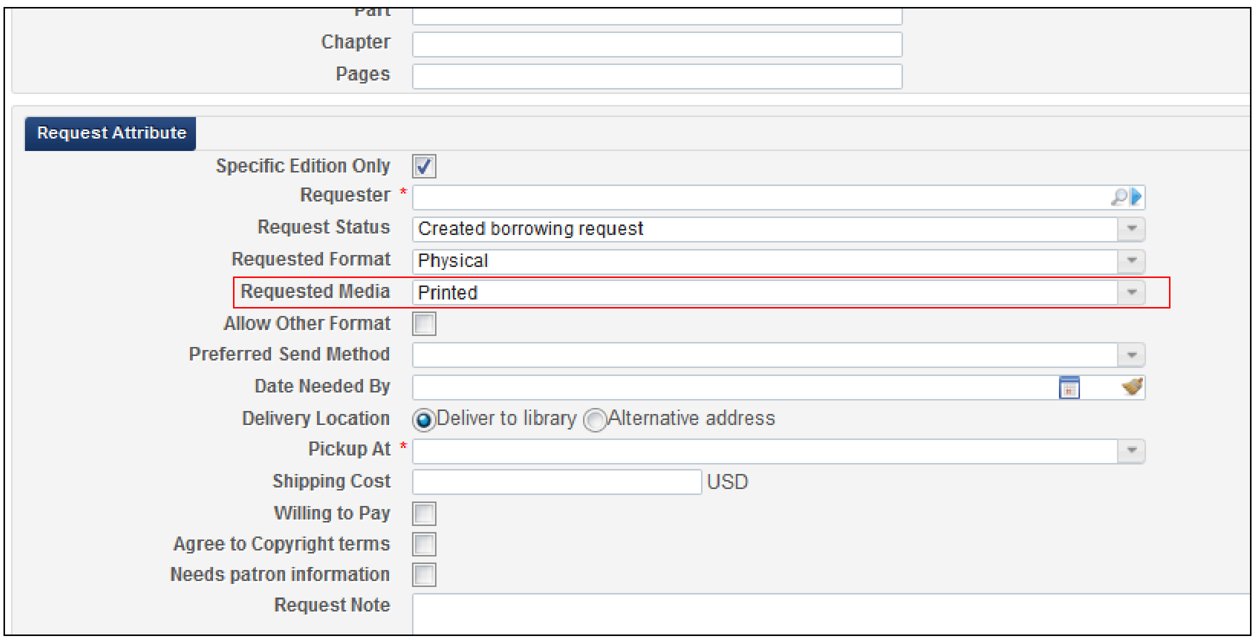


Figure 27 – Requested Media Field

Note: If the request is submitted with a requested media type that was added to the out-of-the-box options and the request is sent to an ISO partner, the partner receives the requested media information in the **Request Note** field.

The **Requested Media** value was also added to the following Alma letters:

- **Borrowing Request** — Sent to a resource sharing partner when a borrowing request has an active partner of **Type = Email**.
- **Print Slip** — Sent when clicking **Print Slip** for a lending request.

- **Shipping Slip** — Sent when clicking **Ship Item** for a lending request, and ensuring that **Automatically Print Slip = Yes** on the resulting Shipping Items page.

Share Item Barcodes between Borrowing and Lending Institutions

Description

When resource sharing ISO-based peers determine that their items' barcodes are unique between them, they can set up the resource sharing process to use the item barcodes as the identifier for managing the process instead of the request ID, during receiving. Lenders' item barcodes can be reused for the borrower's temporary item records, enhancing the efficiency of the resource sharing process.

Technical Instructions

The following role can enable sharing item barcodes between lending and borrowing institutions:

- Resource Sharing Partners Manager

To enable sharing item barcodes between lending and borrowing institutions:

1 On the Resource Sharing Partners page (**Fulfillment > Resource Sharing > Partners**), select **Actions > Edit** for an ISO partner. The Resource Sharing Partner page opens.

2 Click the **Parameters** tab.

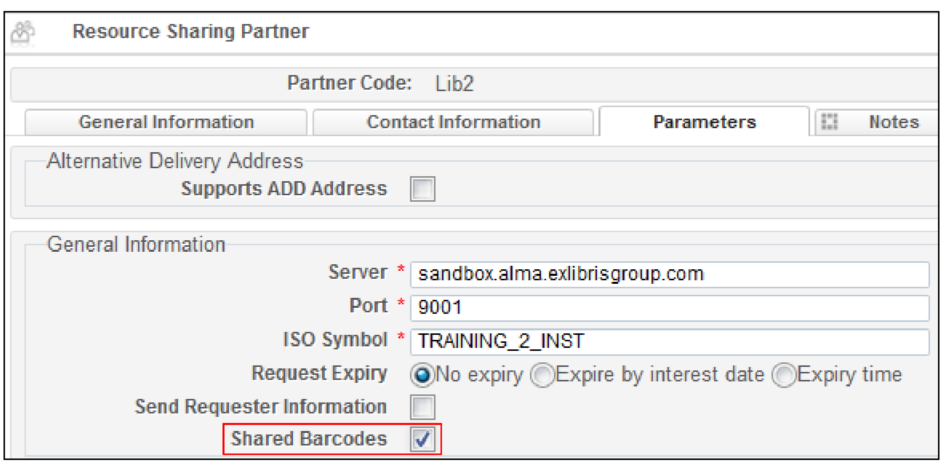


Figure 28 – Resource Sharing Partner Page — Parameters Tab

3 Select the **Shared Barcodes** check box, and click **Save**.

If both the lending and borrowing partners have this option selected:

- The lending library sends a barcode with the **Shipped** message.
- The borrowing library uses the **Shipped** message to determine the lender item's barcode. The barcode appears as the **Temporary Barcode** value on the Receiving Items page (which appears when clicking **Receive** for a borrowing request), and can be used for identifying the received item when accessing the Received Items page (as described in the following procedure).

To receive items based on the items' barcode:

1 Enable sharing barcodes between lending and borrowing institutions, as described in the previous procedure.

2 On the Received Items page (**Fulfillment > Resource Sharing > Receiving Items**), in the **Identifier type** field, select **Barcode**.

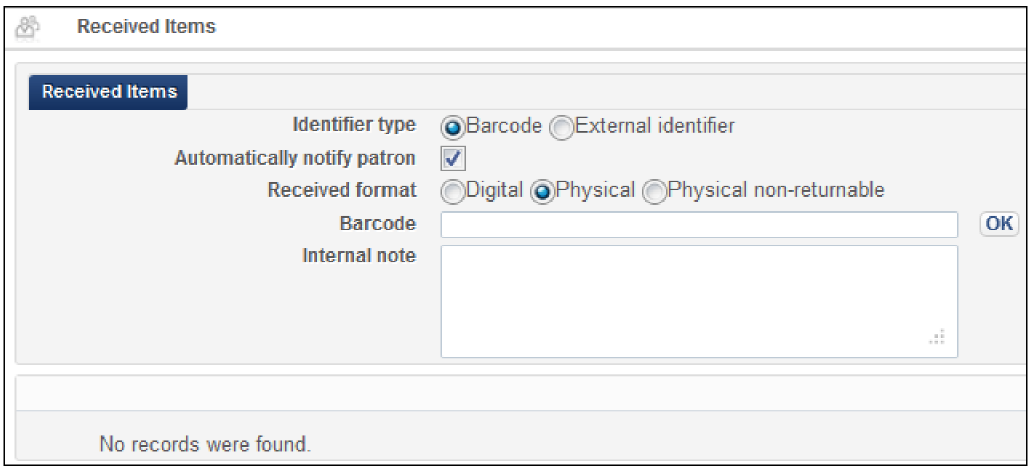


Figure 29 – Received Items Page

3 In the **Barcode** field, enter the barcode of the lender's item and click **OK**. A dialog box opens, containing the item's parameters.

Note: The **Barcode** field appears only when selecting **Barcode** as the Identifier Type. When selecting **External identifier** as the identifier type, the field appears as **External identifier**, where you enter the request's external identifier.

4 Update any necessary fields, and click **Save**. Alma receives the item with the specified item barcode.

Managing a Shared Pool of Resource Sharing Lending Requests

Description

This feature enables managing a shared pool of lending requests, so that only requests that require the special attention of a particular operator get explicitly assigned to that operator. When editing a resource sharing lending request on the **Unassigned** or **Assigned to Others** tabs, the request is assigned to the editing user and appears on the **Assigned to Me** tab. You can now set a configuration parameter so that only clicking **Reassign** for a request moves the request to the **Assigned to Me** tab, and when editing the request, the request remains either as **Unassigned** or **Assigned to Others**.

Technical Instructions

The following roles can disable automatic assignment of resource sharing lending requests:

- General System Administrator
- Fulfillment Administrator

To disable automatic assignment of resource sharing lending requests:

1 On the Customer Parameters Mapping Table page (**Fulfillment > Fulfillment Configuration > General > Other Settings**), locate the **rs_disable_lending_auto_assign** parameter.

29	results_best_location_enable	fulfillment	true	
30	return_lost_loan_from_self_check	fulfillment	true	Is returning a lost loan from self-cl
31	rs_auto_request_lending	fulfillment	false	
32	rs_default_digitization_department	fulfillment		
33	rs_default_pickup_location	fulfillment		
34	rs_disable_lending_auto_assign	fulfillment	false	automatic assignment of lending r
35	rs_support_add_service	fulfillment	true	
36	send_courtesy_notices_and_handle_loa	fulfillment	20150318_110003	Last run time of the job
37	should_anonymize_borrowing_request	fulfillment	true	Should non active borrowing requ
38	should_anonymize_item_loan	fulfillment	true	Should returned loans be anonym

Figure 30 – Customer Parameters Mapping Table Page — rs_disable_lending_auto_assign Parameter

2 Click **Customize** and modify the field in the **parameter value** column to **true**.

3 Click **Save**.

Importing Borrowing Requests from an External System

Description

This feature enables taking resource sharing borrowing requests created in a third party system and then importing them into Alma, where the requests are further processed (such as sending the requests to potential lenders).

The external system may also supply Alma with request information, as well as indications of potential suppliers.

This feature may be used with any system that is able to export resource sharing borrowing requests in XML format, where the borrowing requests are created in an external system but are expected to be further managed in Alma.

Currently, this feature is supported to work with the LIBRIS system (the central catalog system of Sweden).

A full technical description of the file and the integration method will be available in the Developers Network in the coming weeks.

To import borrowing requests from an external system, you need to configure a **Resource Sharing Integration** profile in Alma. The borrowing requests are then imported by running the new **Import resource sharing requests using profile <profile name>** job.

After requests are imported from the external system, additional processing of the requests (for example, sending, receiving, canceling, and so forth) is performed in Alma.

Technical Instructions

The following role can configure a resource sharing integration profile:

- General System Administrator

To configure a resource sharing integration profile:

1. On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), click **Add Integration Profile**. The External System page appears. This is the first page of a two page wizard.

Figure 31 – External System Page — Page 1 of Wizard

2. In the **Code** field, enter a code for the integration profile.
3. In the **Name** field, enter a name for the integration profile.
4. In the **Integration type** field, select **Resource Sharing Integration** from the drop down list.
5. Optionally, in the **Description** field, enter a description for the profile.
6. Click **Next**. The second page of the wizard appears.

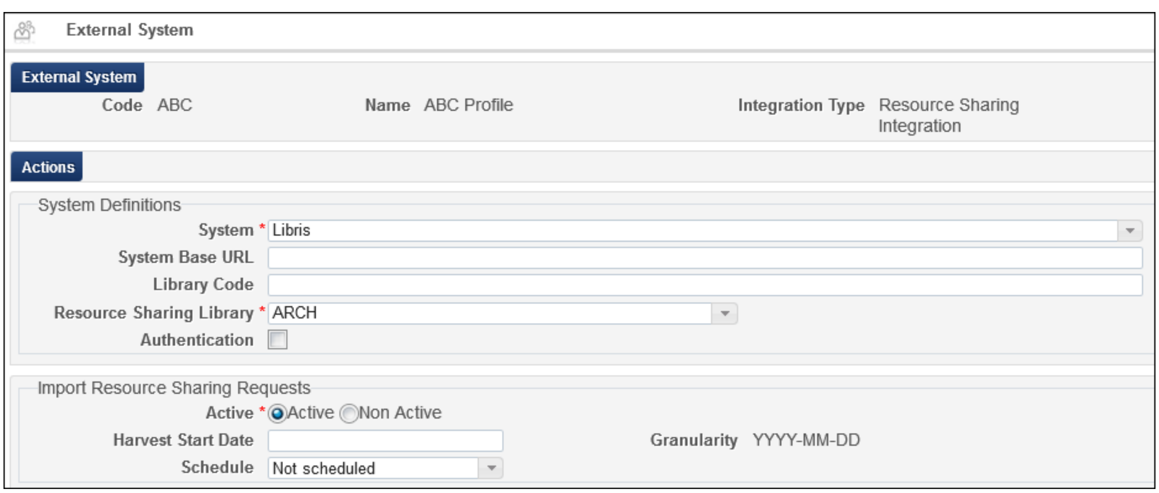


Figure 32 – External System Page — Page 2 of Wizard

The **System** field is automatically populated with the name of the external system (in this case, **Libris**).

7 In the **Resource sharing library** field, select a resource sharing library to which imported requests are to be transferred.

8 Optionally, configure the following parameters:

   a In the **System base URL** field, enter a URL for the system.

   b In the **Library code** field, enter a code for the library.

   c Select the **Authentication** check box to require authentication from the external system before requests can be imported into Alma.

9 In the **Active** field, select **Active** to activate the profile.

10 In the **Harvest start date** field, enter a date according to the granularity specified in the **Granularity** value. This indicates the date from which borrowing requests are imported into Alma, until the current date. For example, if **2015-04-01** is specified as the Harvest start date, all borrowing requests with a date between April 1, 2015 and the current date are imported by the profile.

11 In the **Schedule** field, select a schedule for the import of requests, as follows:

   a **Not scheduled** – The import is not scheduled and will not take place.

   b **Every day at {TIME}** – The import is scheduled to occur every day at a specific time.

   c **Every {DOW} at {TIME}** – The import is scheduled to take place on a specific day of the week at a specific time.

12 Click **Save**. The **Import resource sharing requests using profile <profile name>** job is scheduled according to the value selected in Step 11, above. The job can be monitored on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

   After running the **Import resource sharing requests using profile <profile name>** job, the imported requests appear on the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**).

To monitor the configured resource sharing integration profile:

1 On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), select **Actions > Job History** for the configured resource sharing integration profile. The Job History page appears.

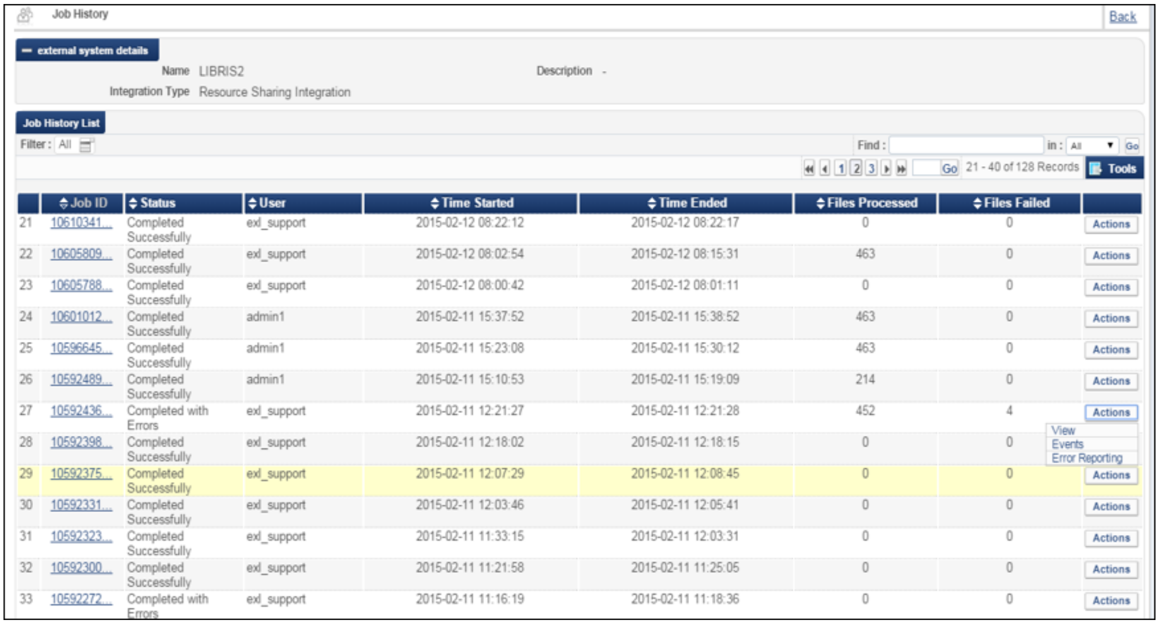


Figure 33 – Job History Page

The page displays the results of the various jobs that have run in Alma.

2 Select **Actions > View** for the **Import resource sharing requests using profile <profile name>** job. The job results appear on the Process Results page.

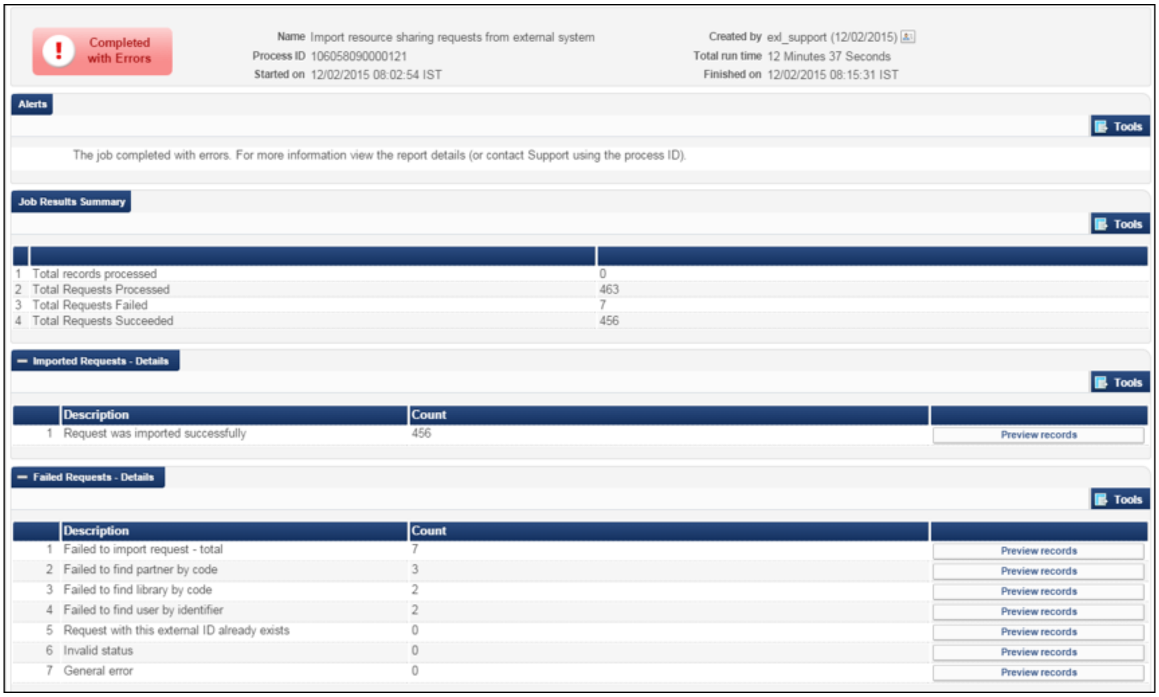


Figure 34 – Process Results Page

3 Click **Preview records** to open the Events Report page and view details on the specific request.

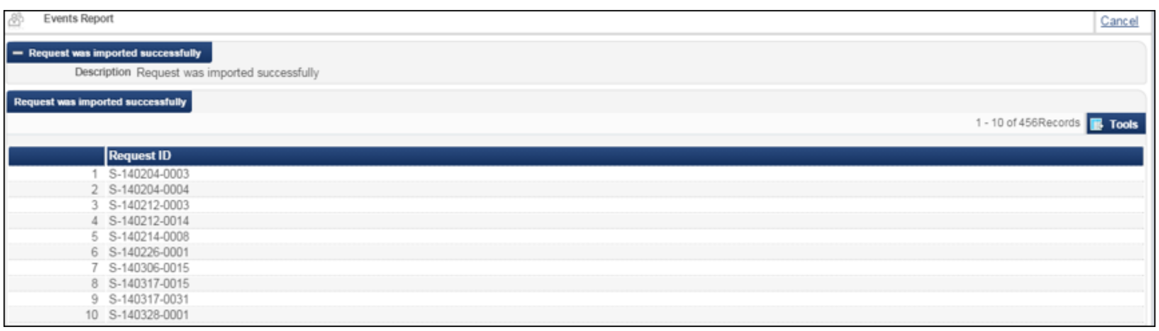


Figure 35 – Events Report Page

Renew or Cancelation Email to Resource Sharing Partners

Description

Until now, Alma generated only the initial request message during resource sharing requests, and any further communications had to be sent by external emails. This feature enables Alma to generate the commonly used **Renew** and **Cancellation** messages to be sent automatically when a resource sharing borrowing request is sent to a partner whose **Type = Email**.

You can configure the Renew and Cancelation emails on either of the following pages:

- The All Code Tables page (**Administration > General Configuration > Configuration Menu > General Configuration > Letter Emails**, and access the **Ful Renew Email Letter** and **Ful Cancel Email Letter** options).
- The Notification Template page (**Administration > General Configuration > Configuration Menu > General Configuration > Notification Template**).

Other Resource Sharing Enhancements

- On the Resource Sharing Lending Requests Task List and Resource Sharing Borrowing Requests pages (**Fulfillment > Resource Sharing > Lending Requests** and **Fulfillment > Resource Sharing > Borrowing Requests**), an **Activity status** filter appears at the top of the page, enabling you to select between viewing **Active** or **Completed** tasks. Your selection is retained when navigating between the page's tabs (**Assigned to Me/Unassigned/Assigned to Others**). When selecting **Completed**, the task list appears as empty and you are prompted to search for one or more specific requests.

  It is not possible to view both **Active** and **Completed** tasks at the same time.
- A facet for **Owning Library** was added to borrowing and lending requests.
- Expired extensions were added to the Expired ISO message.
- The external ID was added to the email subject in emails to partners.
- On the Customer Parameters mapping table (**Fulfillment** > **Fulfillment Configuration** > **Configuration Menu** > **General** > **Other Settings**), there is a new parameter, **fulfillment_network_shared_primo**. Set this to **true** to enable a shared Primo to locate items more accurately in the fulfillment network member institutions. This parameter is not required if the fulfillment network members are part of a collaborative network.

Collaborative Networks and Multicampus Institutions

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

Centralized Management of Configuration Tables

Description

Institutions that administer the Network Zone in a collaborative network can now perform configuration changes and distribute them automatically to member institutions in a collaborative network. This allows for easier coordination between member institutions and reduces duplication of effort.

Both configuration tables that are configured at the table level and configuration tables that are configured at the row level can receive customizations from the Network Zone administrator.

The following conditions apply:

- If a member institution performs a customization in a configuration table, changes from the Network Zone do not overwrite the changes to the configurations for that row or table.
- If a member institution does not want to receive customization changes from the Network Zone, it can customize the row or table (without necessarily changing any data), which blocks it from receiving Network Zone customizations.
- If a member institution later decides to receive customizations from the Network Zone, it can click **Restore,** which changes the configurations for that row or table to the Network Zone configurations and allows that row or table to receive Network Zone configurations in the future.
- If a member institution that has customized a row or table that is managed by the Network Zone wants to return the settings of that row or table to the original settings before any customizations (OTB), it must do so manually (that is, the **Restore** button does not have this functionality for rows and tables managed by the Network Zone).
- If a Network Zone administrator clicks **Restore** and **Save and Distribute** for a row or table, the settings in the member institution are restored to the original settings before any customizations (OTB) of that row or table.
- If a Network Zone administrator clicks **Stop Network Management**, changes performed in the Network Zone are no longer distributed to member institutions. This action leaves member institution data unchanged, that is, a restore is not performed.

The **Distribute Network Zone configuration table changes to member institutions** job distributes any changes made to the Network Zone to the member institutions.

Note: Currently this functionality is only available for select configuration tables.

Technical Instructions

The roles that allow you to perform configurations for the various functional areas can access this feature.

The workflow is different depending on whether the configuration table is one that is configured at the table level or the row level.

To centrally manage configuration tables configured at the row level:

1 From the Network Zone, select a configuration table that is configured at the row level.

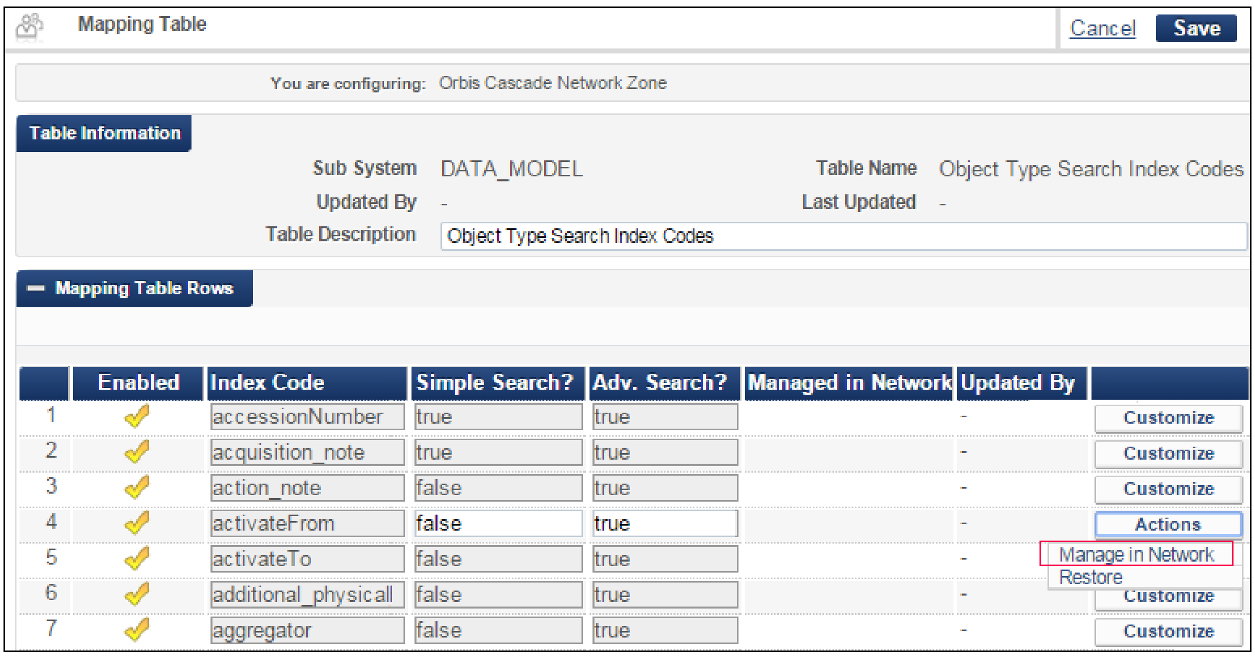


Figure 36 – Row Configuration Table

2 Select **Customize > Actions > Manage in Network** for the row that you want to manage in the Network Zone.

A green check mark appears in the **Managed in Network** column of the row that indicates that that row is managed by the Network Zone.

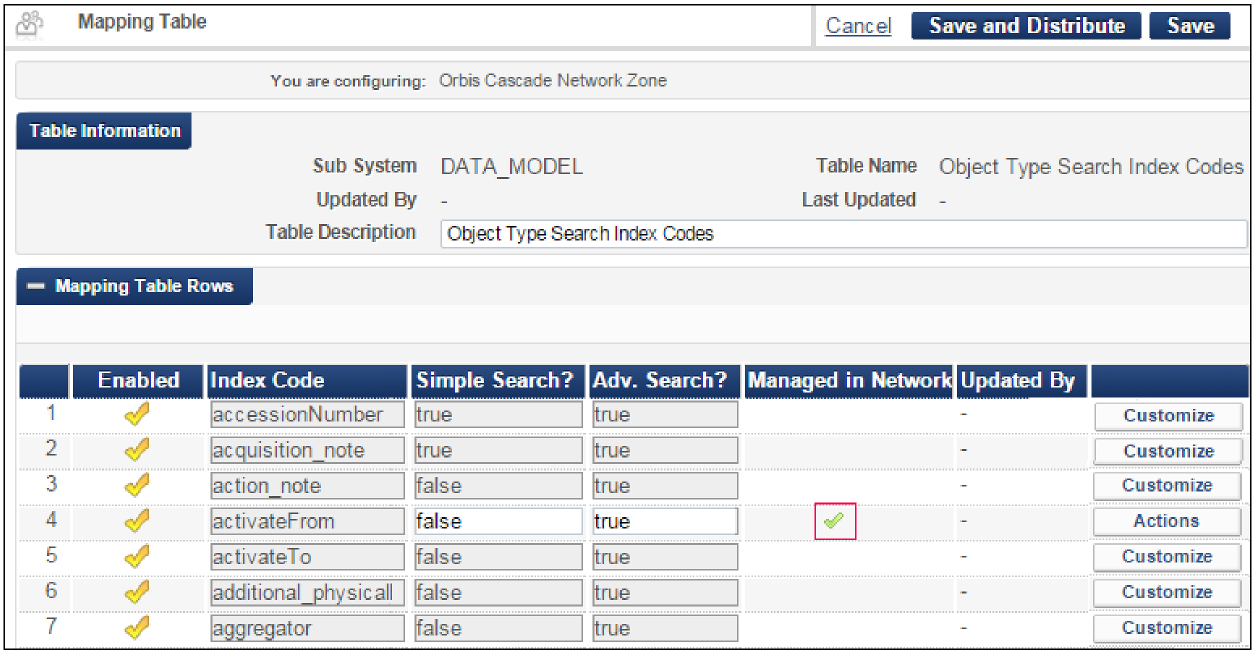


Figure 37 –Managed in Network

3 Perform any customizations that you want to distribute to member institutions.

4 Click **Save** to save the configuration changes without distributing them to member institutions or click **Save and Distribute** to save the configuration changes and distribute them. If you click **Save and Distribute**, the following message appears.

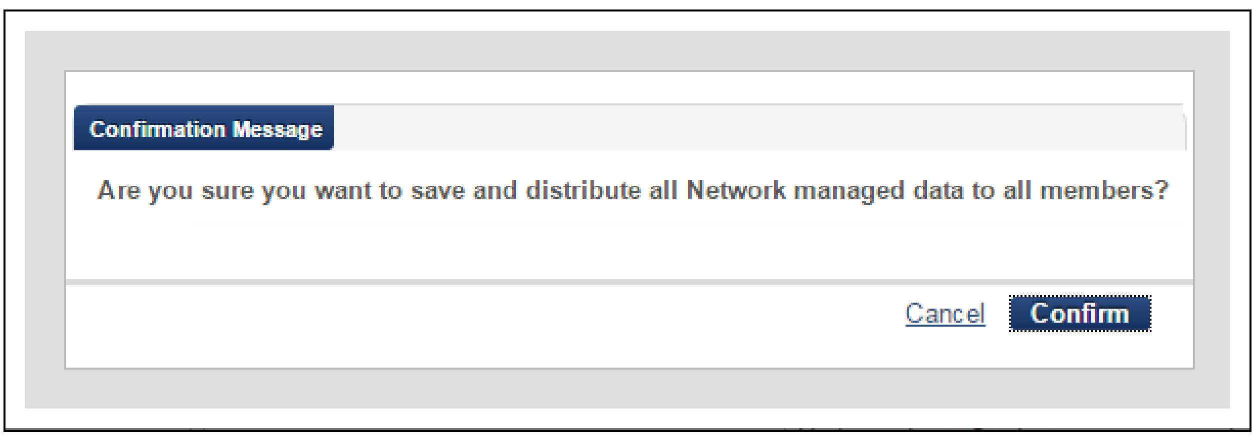


Figure 38 – Confirmation Message

5 Click **Confirm** to run the job that distributes the changes to member institutions.

The configuration changes are distributed to the member institutions when the job runs. **Network** appears in the **Updated By** column both in the Network Zone and the member institution.

6 To stop centralized management of configuration tables, click **Stop Network Management** for the row, and then click **Save and Distribute** and **Confirm** for the confirmation message.

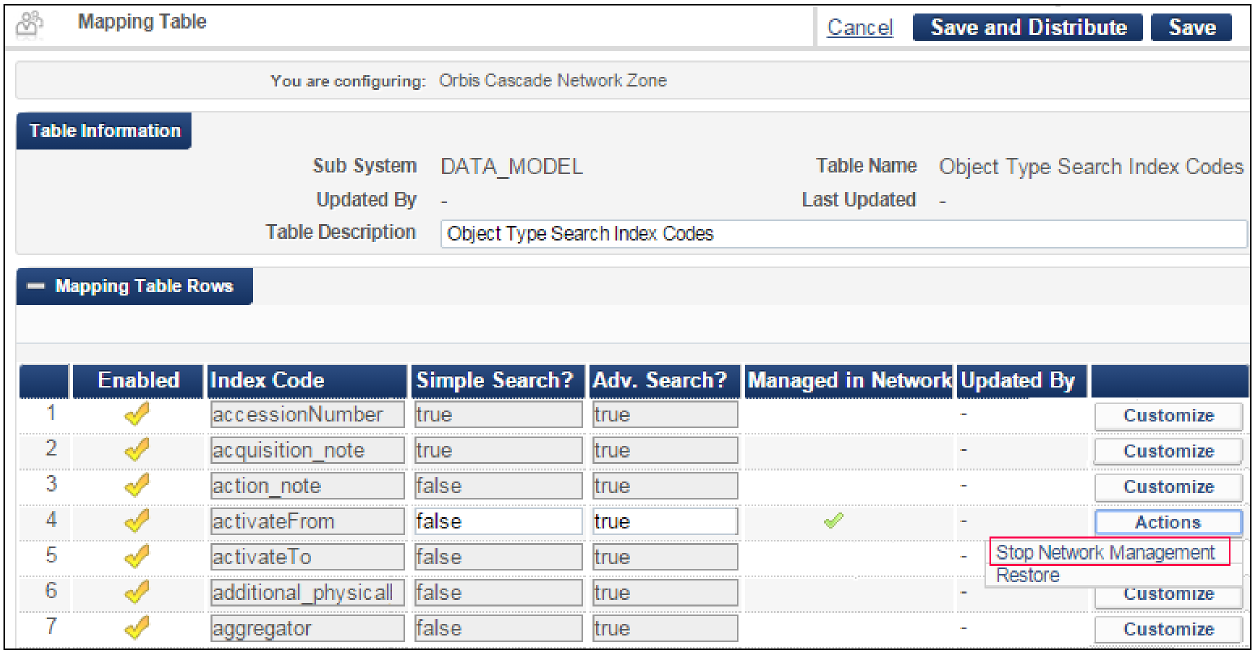


Figure 39 – Stop Network Management

Configuration changes performed in the Network Zone are no longer distributed to member institutions.

To centrally manage configuration tables configured at the table level:

1 From a Network Zone, select a configuration table that is configured at the table level.

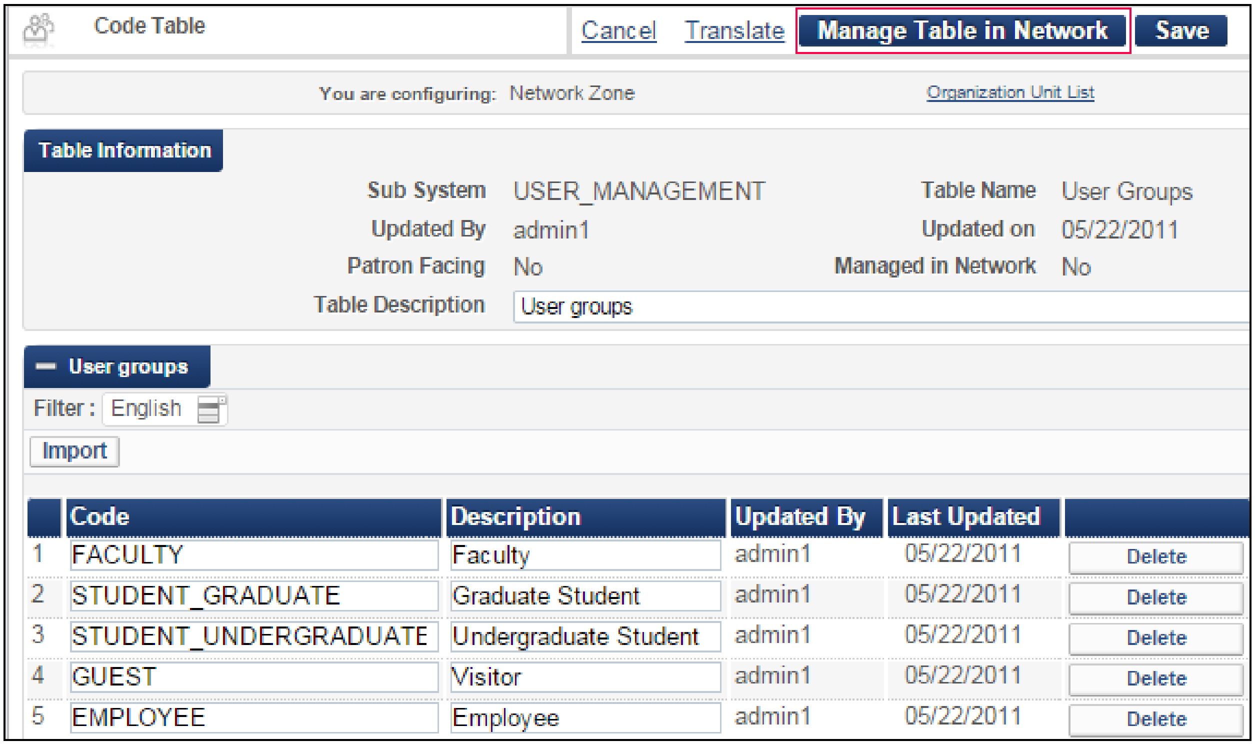


Figure 40 – Table Configuration

2 Click **Manage Table in Network**.

The value for the **Managed in Network** field changes to **Yes** and the **Stop Network Management** and **Save and Distribute** buttons appear.

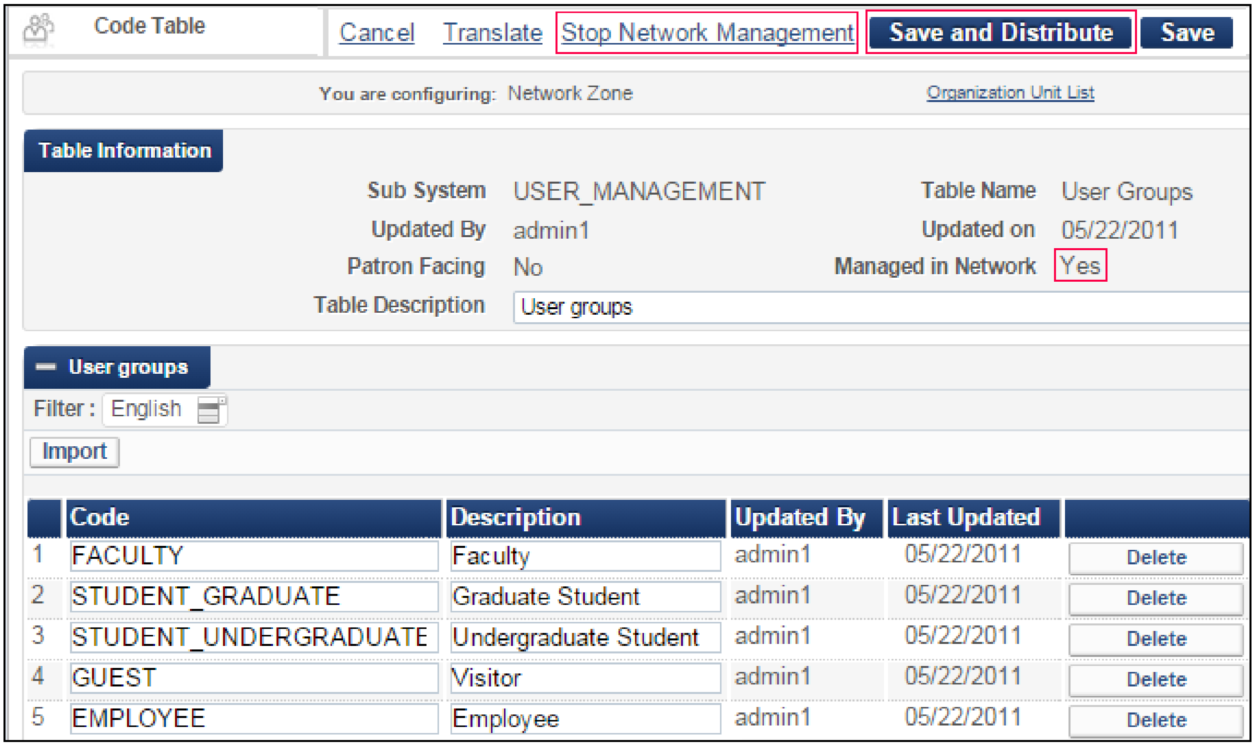


Figure 41 – Managed in Network Zone

3 Perform any customizations that you want to distribute to the member institutions.

4 Click **Save** to save the configuration changes without distributing them to member institutions or click **Save and Distribute** to save the configuration changes and distribute them. If you click **Save and Distribute**, the following message appears.

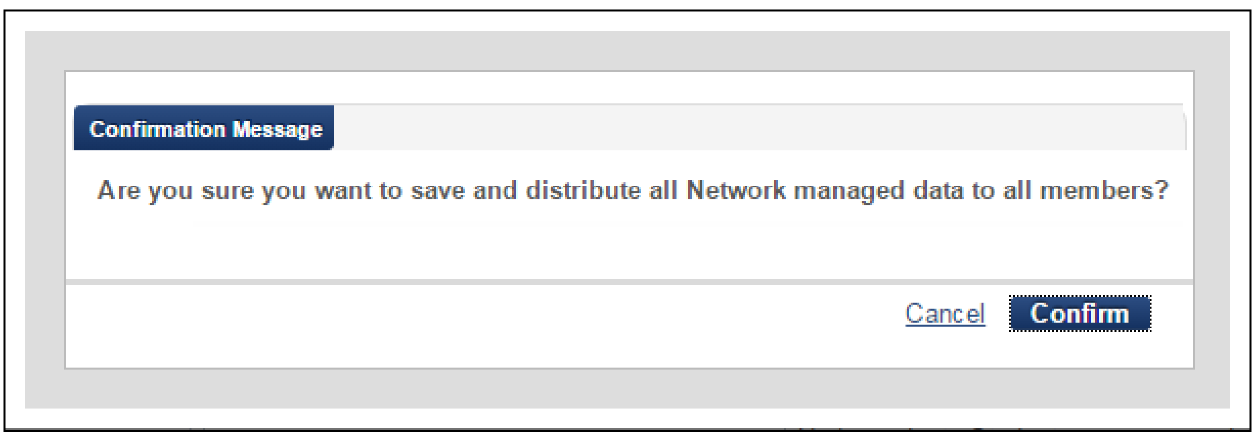


Figure 42 – Confirmation Message

5 Click **Confirm** to run the job that distributes the changes to member institutions.

The configuration changes are distributed to the member institutions. The value for the **Managed in Network** field changes to `Yes` and the value in the **Updated By** column changes to **Network** in the member institutions.

6 To stop centralized management of configuration tables, click **Stop Network Management**, and then click **Save and Distribute** and **Confirm** for the confirmation message.

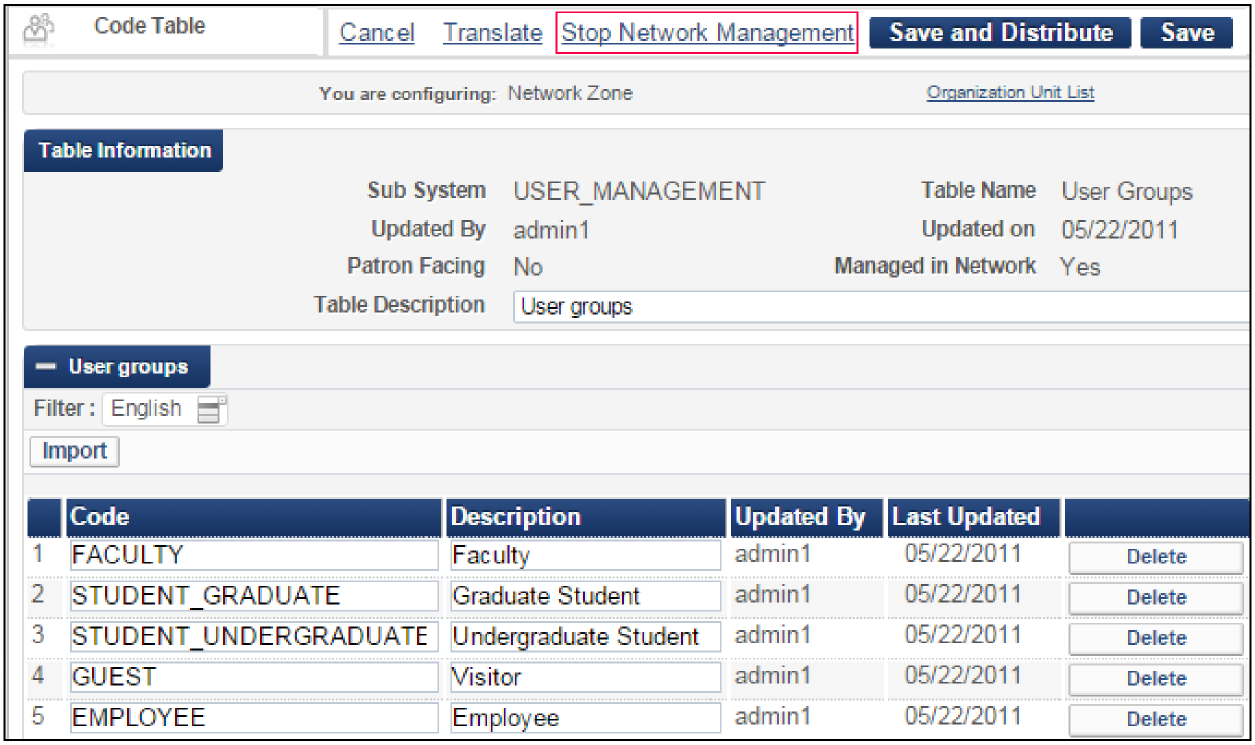


Figure 43 – Stop Network Management

Configuration changes performed in the Network Zone are no longer distributed to member institutions.

Relinking Bibliographic Records in the Network Zone or the Community Zone

Description

You can now relink an electronic portfolio bibliographic record to a different bibliographic record in the Network Zone or Community Zone. This is in addition to the current capability of being able to relink to another bibliographic record within your institution's local catalog. With this capability, you have more flexibility for changing the descriptive information available in the bibliographic record of an electronic portfolio.

Technical Instructions

The following roles can relink electronic portfolio bibliographic records to NZ or CZ bibliographic records:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (for delete bibliographic records option)

To relink electronic portfolio bibliographic records to Network Zone or Community Zone bibliographic records:

1 Open the electronic portfolio in the Electronic Portfolio Editor whose bibliographic record you want to relink.

2 Click **Relink to another bibliographic record**.

The Relink Confirmation dialog box opens.

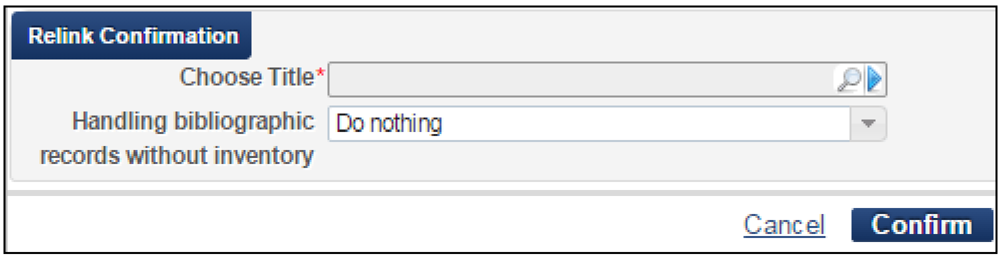


Figure 44 - Relink Confirmation Dialog Box

3 Click the browse icon to the right of **Choose title** to locate the bibliographic record to which you want to link.

The Repository Search page opens so that you can perform a search for the bibliographic record to which you want to link. New with this release, you have the options to select the **Community** tab and the **Network** tab (in a collaborative network environment) for locating a different bibliographic record to which to link the electronic portfolio.

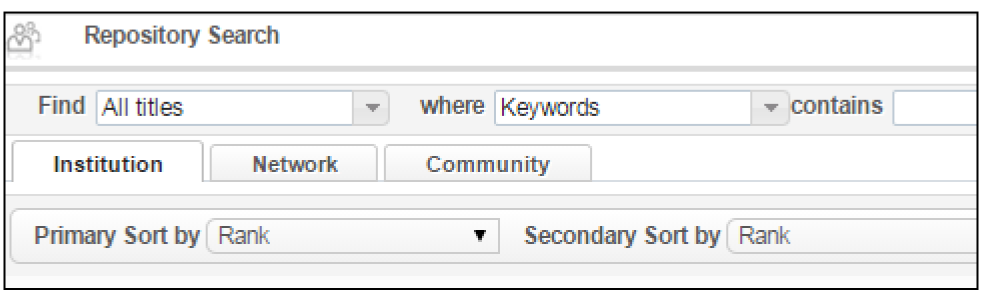


Figure 45 - Search Options for Bibliographic Record to Which You Want to Link

4 Select the tab (**Institution**, **Network**, or **Community**) to match your requirements and complete your search for the bibliographic record to which you want to link.

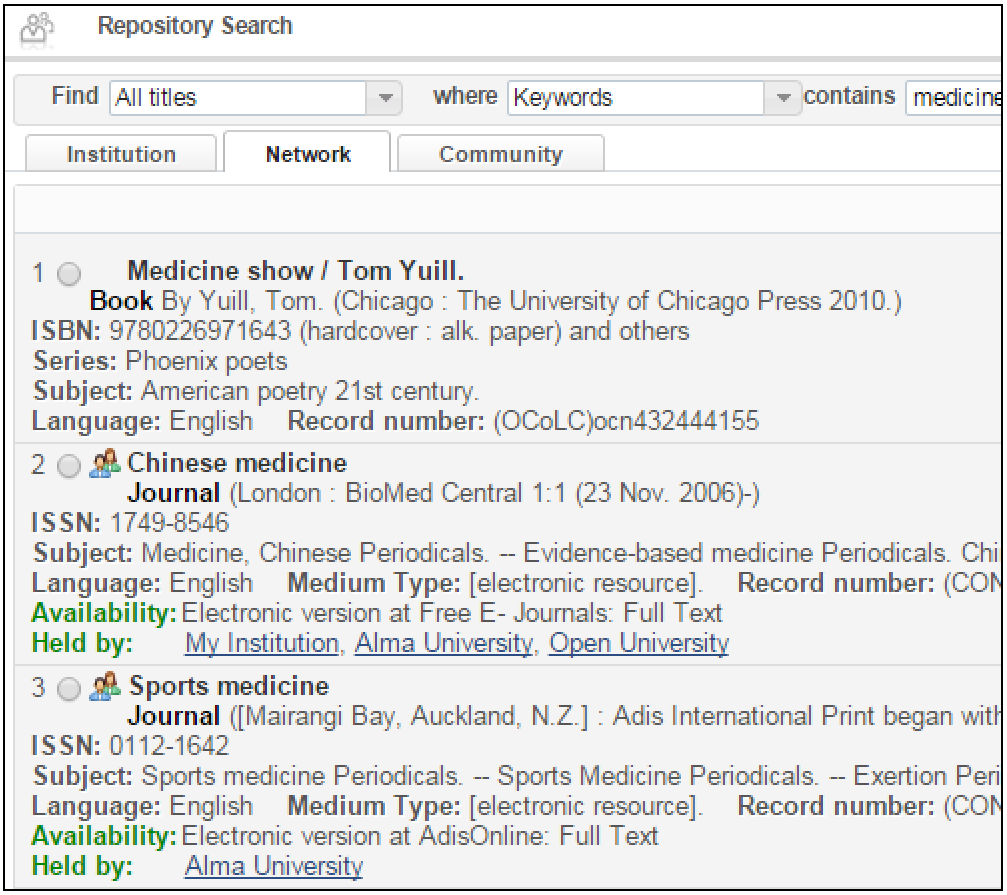


Figure 46 - Relinking Bibliographic Search Results

5 Click the radio button of the bibliographic record to which you want to link and click **Select**.

In the Relink Confirmation dialog box, the **Choose title** parameter appears with your bibliographic selection.

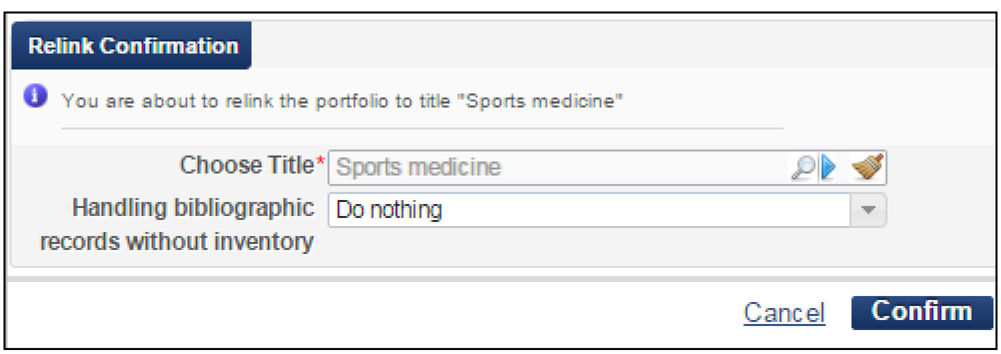


Figure 47 - Bibliographic Selection for the Choose Title Parameter

When you search for the bibliographic record to link to using the **Community** or **Network** tabs, the system determines whether the selected bibliographic record was already localized. If the selected record is not localized, Alma localizes the selected bibliographic record and processes the relinking as usual.

6 Click **Confirm**.

Shared Import Profile Templates in the Network Zone

Description

With this new template capability, you can share vendor-specific import profile definitions in order to simplify the integration with vendors for ongoing workflows such as repository import and embedded order data import.

Collaborative network import profiles managed centrally in the Network Zone can be used as templates that can be copied/customized at the member level.

Technical Instructions

The following role can work with import profiles:

- Catalog Administrator

To create a Network Zone import profile template:

1. Log in to the Network Zone (not member) system.
2. Click **Import Profiles** from the **Record Import** section (**Resource Management > Resource Configuration > Configuration Menu**). The Import Profiles page appears.

   Notice the following changes:

   - Tabs for **Institution** and **Community**
   - **Active** column heading (with on/off check marks) changed to **Status** (with **Active**, **Inactive**, or **Template**)
   - **Run Import** page title changed to **Import Profiles**
   - **Filter** drop-down list label changed to **Profile type**

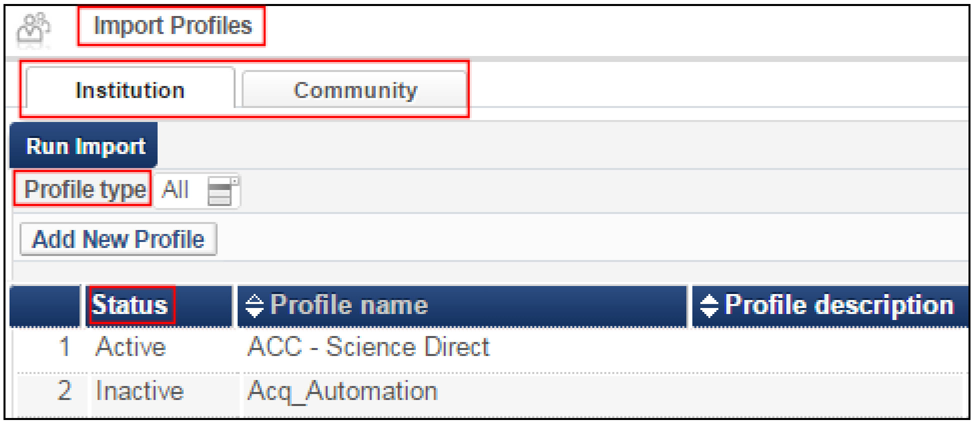


Figure 48 - New Import Profiles Page

3 Click **Add New Profile**.

4 Select **Repository** and click **Next**.

5 Enter **Profile name**, **Originating system**, and select **Template** for the **Status** parameter.

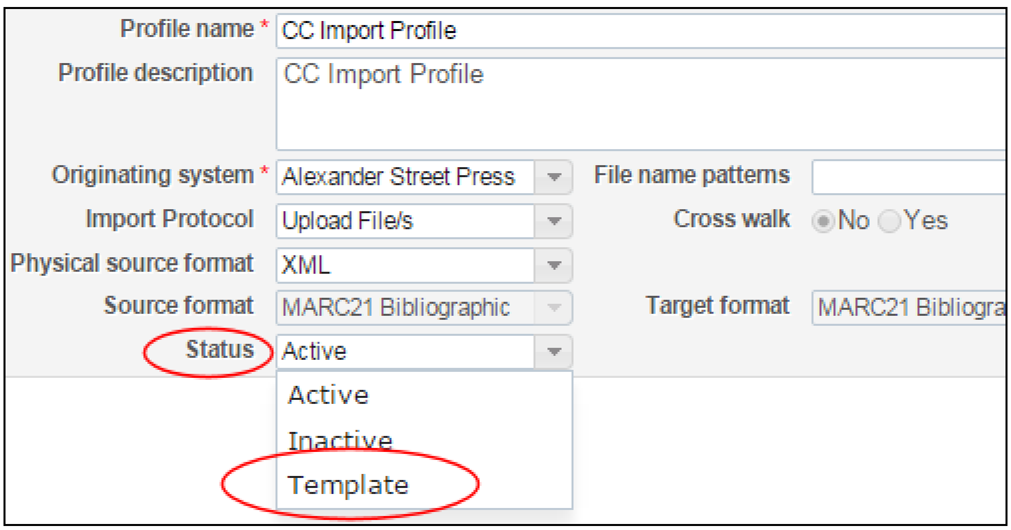


Figure 49 - Template Status

6 Click **Next** and complete the remainder of the profile as usual.

To copy a Network Zone import profile template:

1. Log in to a member system.
2. Click **Import Profiles** from the **Record Import** section (**Resource Management > Resource Configuration > Configuration Menu**). The Import Profiles page appears.

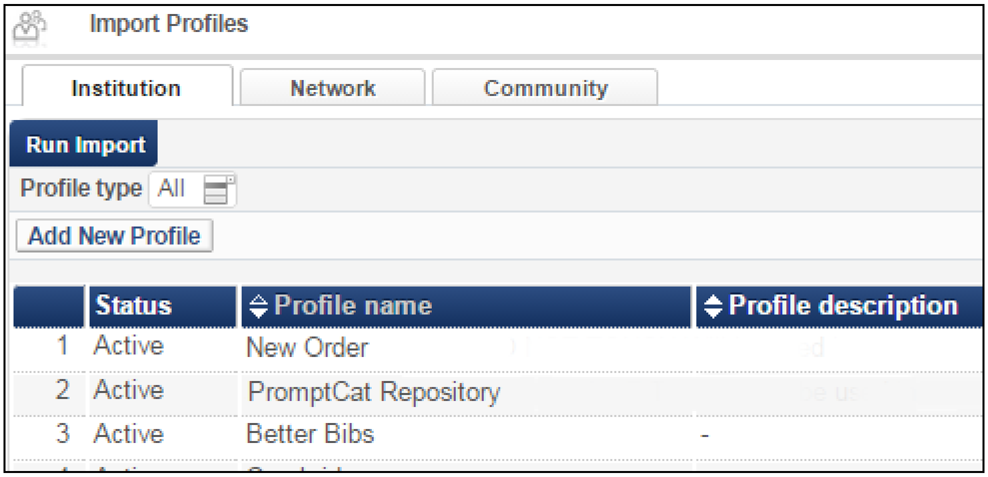


Figure 50 - New Import Profiles Page

3. Select the **Network** tab.
4. Select **Actions > Copy** in the row of the template with which you want to work. The **Profile Details** tab opens on the Import Profile Details page.
5. Edit the import profile details to match your requirements. Refer to the **Creating the Profile Using the Wizard** section in the *Alma Resource Management Guide* or Alma online help for information regarding the import profile parameters and options.
6. When you have completed your import profile changes, click **Save**.
7. Select the **Institution** tab to view the profile that you copied. By default, the copied profile has **copied from** information appended to the profile name.

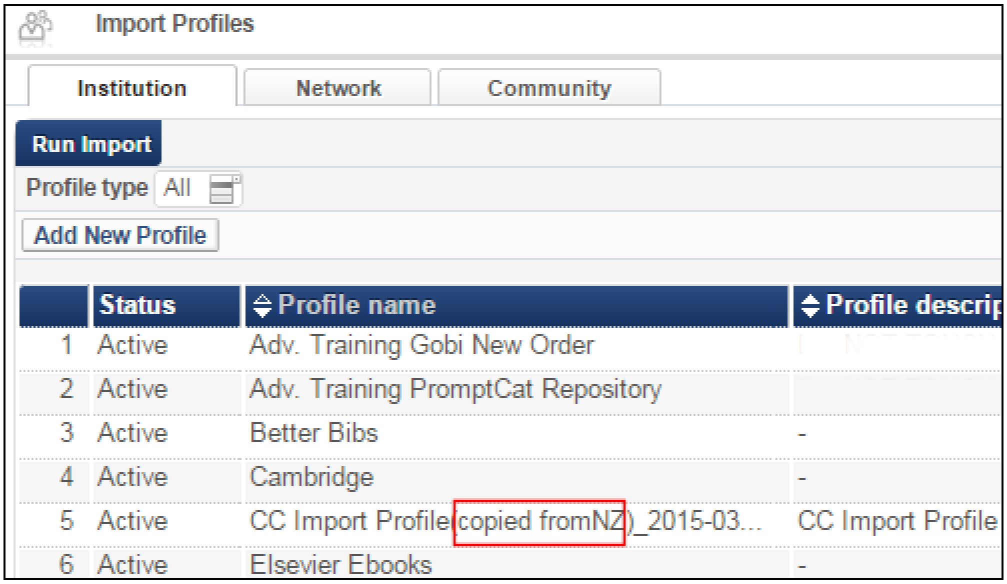


Figure 51 - Copied Template

Other Collaborative Network Enhancements

- Network Zone-level Primo publishing was enhanced to handle the publishing of digital records as well (which it did not handle previously).

Analytics

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

Collaborative Network Level Reporting

Description

As part of the new collaborative network Analytics development, the new shared Institution dimension was added to all subject areas. This new dimension enables reports to be created that compare data across several member institutions of a collaborative network. This allows collaborative networks to perform comparative analytics across the member institutions.

The dimension includes two fields:

- Institution Code
- Institution Name

These fields allow the Network Zone to view reports according to institution. Until now, the Network Zone could not run reports on the transactions that were performed in member institutions.

If an Analytics report is run from a collaborative network's Network Zone, all member institutions (that is, all the Institution Codes and Institution Names) are included in the report.

If an Analytics report is run from a member institution, only the single institution from which the report is run (with its Institution Code and Institution Name) is included in the report.

Note: Reports involving data across a collaborative network may take longer to run than reports within one institution.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Institution dimension in Alma Analytics:

In the Physical Items subject area, for example, the Institution dimension was added.

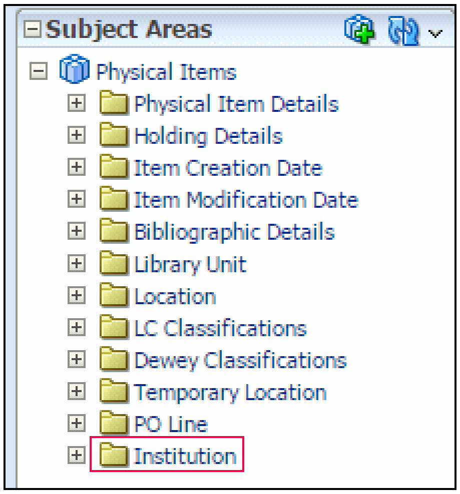
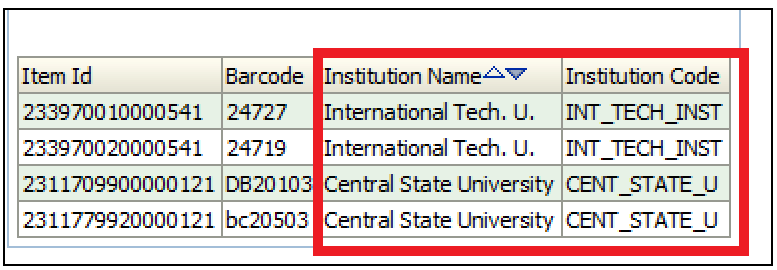


Figure 52 – Institution Dimension

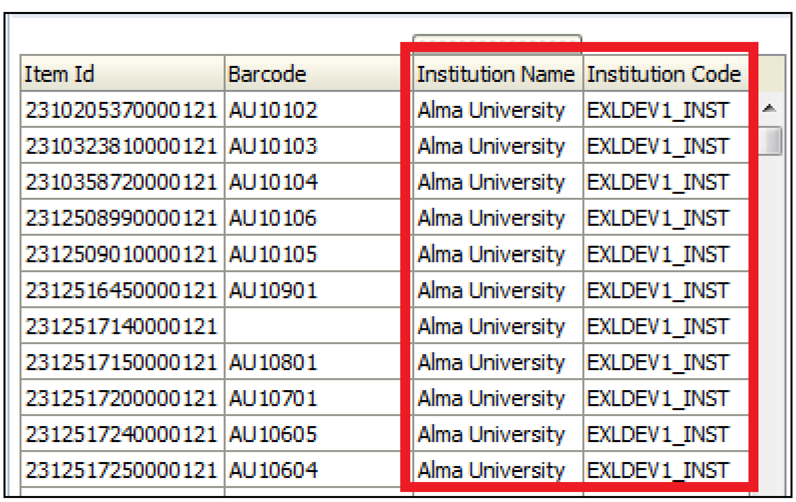
The following is an example report from a Network Zone. The items can be filtered according to member institution:



Item Id	Barcode	Institution Name	Institution Code
233970010000541	24727	International Tech. U.	INT_TECH_INST
233970020000541	24719	International Tech. U.	INT_TECH_INST
2311709900000121	DB20103	Central State University	CENT_STATE_U
2311779920000121	bc20503	Central State University	CENT_STATE_U

Figure 53 – Institution Dimension Report - Network Zone

The following is an example report from a member institution. Only items from that member institution appear. (The same results appear for institutions that are not part of a collaborative network):



Item Id	Barcode	Institution Name	Institution Code
2310205370000121	AU10102	Alma University	EXLDEV1_INST
2310323810000121	AU10103	Alma University	EXLDEV1_INST
2310358720000121	AU10104	Alma University	EXLDEV1_INST
2312508990000121	AU10106	Alma University	EXLDEV1_INST
2312509010000121	AU10105	Alma University	EXLDEV1_INST
2312516450000121	AU10901	Alma University	EXLDEV1_INST
2312517140000121		Alma University	EXLDEV1_INST
2312517150000121	AU10801	Alma University	EXLDEV1_INST
2312517200000121	AU10701	Alma University	EXLDEV1_INST
2312517240000121	AU10605	Alma University	EXLDEV1_INST
2312517250000121	AU10604	Alma University	EXLDEV1_INST

Figure 54 – Institution Dimension Report – Member Institution

Enhancements to the Borrowing Requests and Lending Requests Subject Areas

The following enhancements have been implemented to the **Borrowing Requests** and **Lending Requests** subject areas:

- The order of the dimensions has been changed to be more logical.
- In the **Borrowing** and **Lending Request Details** dimensions:
  - All measure columns have been moved to the top of the list
  - **Request Format** has been renamed **Requested Format**
  - **ID** has been renamed **Internal ID**
  - **Due Date** has been renamed **Due Date (to be deprecated)**, since this field already exists in the Due Date dimension
  - **Title** has been renamed **Title (to be deprecated)**, since this field already exists in the Bibliographic Details dimension
  - The order of the fields in these dimensions has been changed to be more logical.

The following additional enhancements have been implemented in the Borrowing Requests subject area:

- In the **Borrowing Request Details** dimension, **Full Request ID** has been renamed **Fulfillment Request ID**
- The **User Details** dimension has been renamed **Requester** and the order of the fields has been changed to match the order found in the **User Details** dimensions found in other subject areas.
- In the **Bibliographic Details** dimension, the order of the fields has been changed to match the order found in the **Bibliographic Details** dimensions found in other subject areas.
- The order of the fields in the **Patron Details** dimension has been changed to be more logical.

Other Alma Analytics Updates

- The following two fields were changed:
  - Receiving Date was renamed **Receiving Date and Time**.
  - **Receiving Date** is a new field, which is the same as Receiving Date and Time, but without the time.

Alma APIs

For the May 2015 release, the following API enhancements were made:

- An API (**/conf/md_import_profiles**) was added to retrieve MD import profiles. The results can be filtered by type (digital, electronic, physical). For details, see https://developers.exlibrisgroup.com/alma/apis/conf.
- The following additions were made to the PO line APIs:
  - The ability to search PO lines by MMS ID. The search results include all PO lines that link to the specified MMS ID, as well as all PO lines that link to bibliographic records which link to the specified MMS ID (for cases where the MMS ID is from the Network Zone). For more information, see *Searching for PO Line by MMS ID*.
  - The **Receive Date** field was added to the copy object in the GET PO line API.
  - The **Order Date** (create date) and **Status Date** fields were added to the response in the GET PO line API.
- The API to retrieve a list of courses now includes **order_by** and **direction** (for sorting) parameters.
- The **total_amount** field was added to invoice and invoice lines returned by Get Invoice APIs.

Alma Interface Updates

The following sections describe Alma interface update enhancements provided in the May 2015 release.

SAML Single Logout

Description

Alma can now be configured for SAML single logout from an external system (until now, only single login between Alma and an external system was possible).

In some configurations, when you log out of the external system, you are also automatically logged out of Alma. Alternately, when you log out of the external system, the external system presents you with the option of also logging out of Alma. If you do not log out of Alma at that time, your Alma session remains active.

A new text field was added to the external system's Integration Profile List page. The new field **IDP Single Logout Service** sets an external URL that Alma calls with the result after the external system asks Alma to log you out.

Note: You cannot yet log out of Alma and automatically be logged out of the external system.

Technical Instructions

The following role can configure SAML single logout:

- General System Administrator

To configure SAML single logout:

Note: Before configuring SAML single logout, ensure that Ex Libris Support has added support for single logout to your Alma metadata files.

1. In Alma, on the General Configuration Tab (**Administration** > **General Configuration** > **Configuration Menu**) click **Integration Profiles** under **External Systems**. The Integration Profile List page appears.
2. Click the SAML profile that defines the relationship with your external system. The external system's SAML details appear.
3. Click the **Actions** tab.

4 In the **IDP Single Logout Service** field, enter the URL that Alma calls with the result after the external system asks Alma to log you out. This URL must match the URL defined for **singleLogoutService** in the external system's SAML metadata file. Contact customer support for assistance.

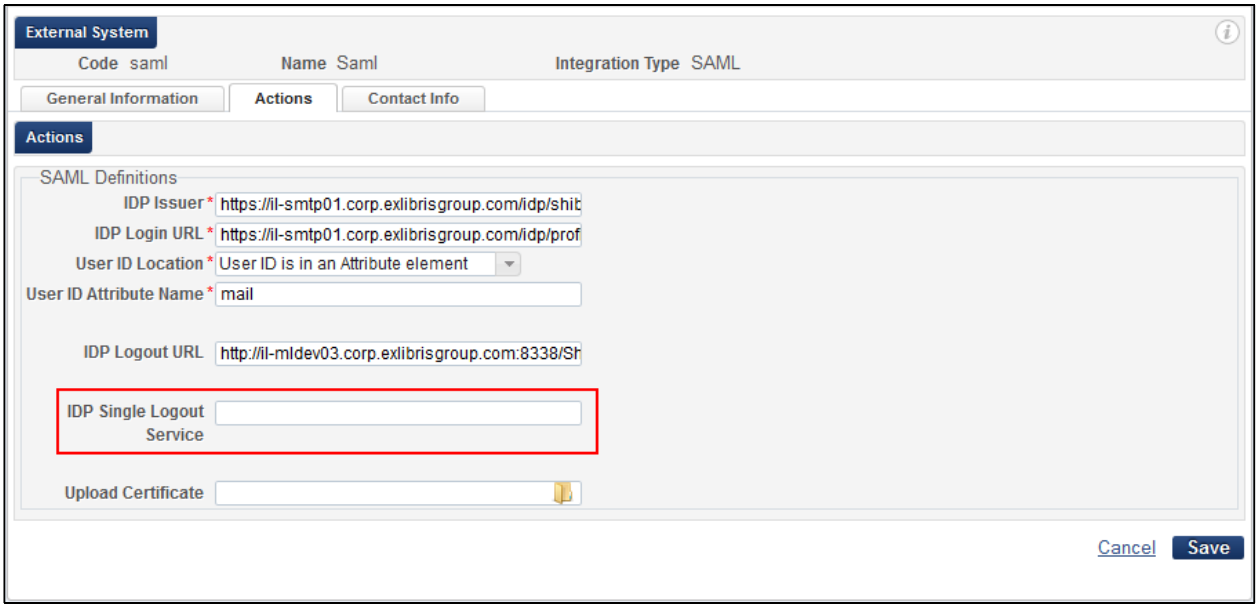


Figure 55 – IDP Single Logout Service

5 Click **Save**.

Other Alma Interface Updates

- The options under the **Actions** button that appears on many pages in Alma were configured to appear on one line to prevent text wrapping. For example, the Email Notifications option under **Administration > Manage Jobs > Monitor Jobs > Actions** now appears on one line:

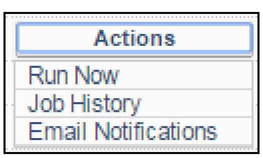


Figure 56 – Actions > Email Notifications

- Until now, a customer could edit the time zone (time_zone) in **General Configuration > Configuration Menu > General Configuration > Other Settings**. This was changed and now the time zone can be edited only by Ex Libris staff.
- The **Privileges Report** and **Roles Report** were restored under **Administration > User Management Configuration** > **Configuration Menu**.

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although resource sharing renewal requests are controlled by a partner's workflow profile, changing the due date using the Change Due Date option is possible even if the workflow profile does not allow this option.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- Related to the feature for contributing portfolios to the Community Zone, a Community Zone portfolio with multiple rows of to/from coverage information before a contribution is made, appears as only a single row of to/from coverage information after the contribution and the Community Zone portfolio is updated. The fix for this issue is scheduled for completion in May.