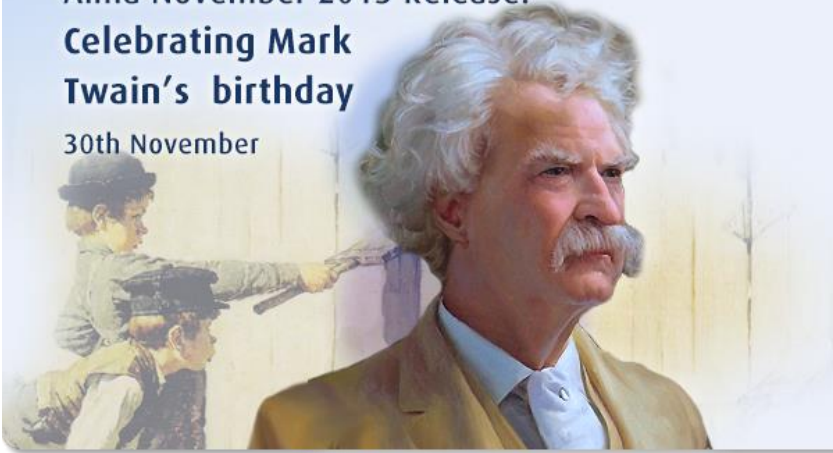


Alma November 2015 Release:  
**Celebrating Mark  
Twain's birthday**

30th November



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# Alma November 2015 Release Highlights

## Acquisitions

- **EDI Claim Responses** - Alma now receives order responses to EDI claims. These responses are loaded by the standard EDI Load Files job. A new line, **Total Journal Claim Order Response**, and a new section, **Order Response Journal Claim**, appear in the report if a response of this type was received.
- **Change Vendor in Sent PO Line** - You can now change the vendor in a PO line even after it was sent to the vendor.
- **Invoice/License Audit History** - Changes to invoices and licenses are now tracked and available to view in the History tab of the Invoice Details and License Details pages.

## Resource Management

- **Filter Sets (\*\*A NERS Enhancement Request\*\*)** - Alma extends the functionality of sets by enabling you to filter existing sets to create new sets. This is especially helpful when you need a set that is based on metadata elements that are not indexed. This new capability is implemented with indication rules. Similar to normalization rules, indication rules use the flexible Drools logic to filter existing sets.
- **Staff Search Enhancements** - A great new option has been added to the repository search - the ability to display book covers and thumbnails. With this option turned on, Alma will look for book/journal covers from various sources (initially Google, but will be expanded in the future) in order to provide a visual indication of the resource. When no such cover exists, a 'resource' icon will display, to help enhance the search results experience.

## Fulfillment

- **Configuring Self-Check Machine Messages** - You can now configure the textual messages that the self-check machine will display in various cases, such as when an action is rejected because of a block.

- **Patron Blocking Due to Overdue Loans** - A blocking policy may now be implemented, so that a returned overdue loan will trigger a block on the user record, as per the defined policy. A block policy may be set separately for each Terms of Use. It can be selected for a period of time depending on the time the loan is overdue, or may be for a fixed time. Either way, the operator will be able to specify whether a block is applied based on only open days or all days. A block will automatically be removed once the expiry date has passed as part of the **Users – Remove Blocks** job.
- **Digital Copyrights** - Digitization profile rules can now automatically impact the copyright and approval process according to the time span (in calendar years) and request type. The outputs have new options for controlling the workflow. The approval and copyright clearance can now be set to continue in parallel to the digitization workflow, block the digitization workflow, or be automatically approved.

## Resource Sharing

- **Automatic Conversion of Hold Requests to Resource Sharing Requests** - You can now configure Alma to automatically convert unfulfilled hold and patron digitization requests into resource sharing requests. This enables you to implement a policy where hold requests that failed to be fulfilled in the library are automatically processed as resource sharing requests. This policy may be activated for specific user types, as per library policies.
- **Resource Sharing Request Recalls** - This new feature will manage recalling shipped out items if a local hold request is placed for that resource. The user can configure and control which loans will be recalled first if the requested resource has both copies that have been shipped to a remote borrower and copies loaned to local patrons.
- **Borrower-side Copyright Blocks** - Managing a flow for copyrights is now enabled for resource sharing borrowing requests.

## Collaborative Networks and Multicampus Institutions

- **Improved Visualization of Shared Electronic Resources** - Alma will now identify Community Zone resources that are available to member institutions in the Network Zone when doing an **All titles** search for activated electronic resources to which they have access.

- **Enhanced Patron Search in Fulfillment Network** - Registering a linked patron for a walk-in service will now be made available based on patron attributes, such as name and email, in addition to the patron identifier.

## Alma Interface Updates

- **Importing Tables** - The **Import** button that appears on many code tables is now functional.

# Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for this release of Alma.

## Alma Show Me How

### Description

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

### Step-by-Step Instructions

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

#### To access Show Me How:

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

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

- Digital Copyrights

The following pop-ups are also available:

- **New: EDI Claim Responses** - To activate, select Acquisitions > Manage EDI Tasks
- **New: Change the Vendor of a Sent PO Line** - To activate, access any PO line Summary page; or select Acquisitions > Review > Edit a PO Line
- **New: Filter Sets (a NERS enhancement request)** - To activate, select Resource Management > Manage Sets
- **New Search Options for ILL Requests** - To activate, select Fulfillment > Resource Sharing > Borrowing Requests/Lending Requests

- **New: Resource Sharing Request Recalls** - To activate, select Fulfillment > Resource Sharing > Lending Requests

## Alma Videos

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

- [Filter Sets \(a NERS enhancement request\)](#)
- [Improved Visualization of Shared Electronic Resources](#)
- [Invoice/License Audit History](#)
- [Queuing of E-Resource Activation Jobs](#)
- [Institution MMS ID in Bibliographic Records](#)
- [Change the Vendor of a Sent PO Line](#)
- [Patron Blocking Due to Overdue Loans](#)
- [Digital Copyrights](#)
- [Automatic Conversion of Hold Requests to Resource Sharing Requests](#)
- [Enhanced Search Options in Resource Sharing](#)
- [Resource Sharing Request Recalls](#)

# Making the Most of This Release

The following release note features require actions or decisions on the part of your institution in order to implement:

Action Items
<input type="checkbox"/> <a href="#">Receiving Claim Responses from Vendors Using EDI</a> - This last step in the chain will enable unnecessary claims to be eliminated at the source and help you improve the claim workflow with your vendors.
<input type="checkbox"/> <a href="#">Publishing Electronic Holdings to Libraries Australia</a> - Are you publishing print holdings to Libraries Australia? Note the new functionality that now enables you to publish electronic holdings as well.
<input type="checkbox"/> <a href="#">Filter Sets</a> - You can now make sets that include both indexes and the entire content of the descriptive record using indication rules.
<input type="checkbox"/> <a href="#">Patron Blocking Due to Overdue Loans</a> - If your library has a policy for blocking loan privileges from patrons that return overdue items, this new feature will allow you to implement this policy in a streamlined manner—as a fulfillment policy, in addition to or instead of a fine policy, as per the library policies.
<input type="checkbox"/> <a href="#">New Options for Digitization Profile Rules</a> - Libraries that implement copyright management workflows should take an extra look at this new feature. The Digitization Profile Rules provide new options for setting copyright management rules based on the number of requests that have been made for the same resource over a given period of time.
<input type="checkbox"/> <a href="#">Borrower-side Copyright Blocks</a> - Libraries that would like to implement borrower-side copyright management of resource sharing requests should look into implementing this new option. Along with the new options that have been added to the Digitization Profile Rules, a policy for marking borrowing requests as requiring copyright management can now be implemented.

## Action Items

- [Enhanced Patron Search in Fulfillment Network](#) - Fulfillment Network users gain improved search options for their walk-in service with this new feature, and no longer depend on the walk-in patron being able to use a library identifier in order to be able to receive walk in service as a guest in another library, as per library configuration.
- [Automatic Conversion of Hold Requests to Resource Sharing Requests](#) - This new feature can greatly improve the service an end user receives when requesting a library resource. If configured, requests that fail to be fulfilled—for example, because the requested items are missing or lost—will automatically become resource sharing requests.
- [Resource Sharing Request Recalls](#) - This new feature can be used to expand the resource sharing workflow, regardless of whether you're using ISO-based requests or non-ISO requests, such as emails.

# Acquisitions

The following sections describe new or changed Acquisitions features in this release of Alma.

## Receiving Claim Responses from Vendors Using EDI

Alma now supports receiving claim responses using EDI. An EDI claim response is a type of order response. These responses are loaded by the standard EDI Load Files job. A new line in the **Summary** section, **Total Journal Claim Order Response**, and a new section, **Order Response Journal Claim**, appear in the report if a response of this type was received.

Job Report

Completed Successfully

Name: EDI - Load Files EDI  
Process ID: 335720410000121  
Started on: 16/09/2015 18:52:27 IDT

Created by: exl\_impl (16/09/2015)  
Total run time: 1 Seconds  
Finished on: 16/09/2015 18:52:29 IDT

Job Results Summary

1	Total records processed	0
2	Total files handled	1
3	Total invoices	0
4	Total Shelf ready Order responses	0
5	Total Report task Order responses	0
6	Total Journal Claim Order Response	1

Order Response Journal Claim

PO Line in Order response	Items updated	Items not updated
1 POL-123	0	1

Figure 1 - EDI Load Files Job Report

Information about the response appears in the Notes tab of the relevant PO lines.

Created On	Updated By	Updated On	Note	
16/09/2015	System	16/09/2015	Order Response: Order number POL-123. Accepted as is. Out of print, will reprint and supply	<a href="#">View</a>
10/08/2015	exl_impl	10/08/2015	It was decided to cancel the poline. Operation done on 2015-08-10 by exl_impl	<a href="#">View</a>

Figure 2 - PO Line Summary, Notes Tab

For more information about EDI order responses, see *Electronic Data Interchange (EDI)* in the Alma Integrations with *External Systems Guide* or the Alma Online Help.

## Change the Vendor of a Sent PO Line

### Description

You can now change the vendor in a PO line even after it was sent to the vendor. There are two business cases for this:

- The original vendor could not supply the item(s), so the PO line must be sent again to a new vendor.
- The original vendor is actually a supplier on behalf of another vendor, or the vendor has merged with a different vendor. In this case, the PO line is not sent again. The change simply reflects a correction in the PO line's information.

The change can be made manually on the PO Line Summary page (pictured below).

---

**Note:** Changing the vendor of a sent PO line is not available using the **Update PO Lines Information** job.

---

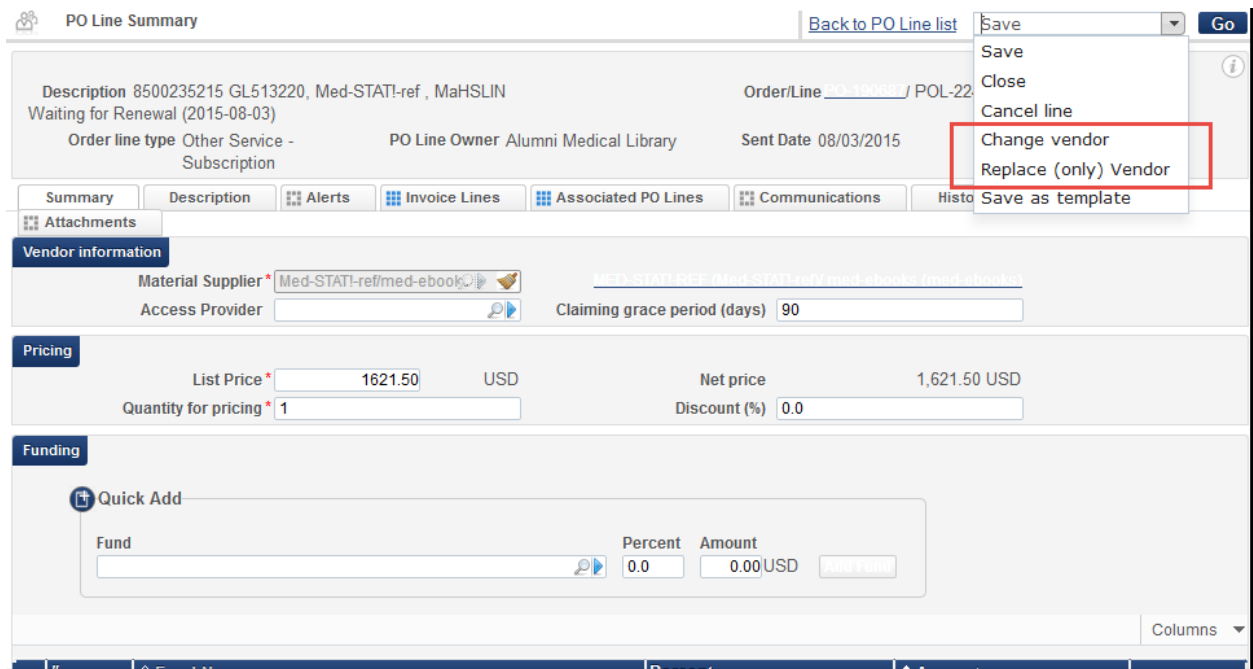


Figure 3 - PO Line Summary Page

## Step-by-Step Instructions

The following roles can change a vendor in a sent PO line:

- Purchasing Manager
- Purchasing Operator

### To change a vendor in a sent PO line so that the PO line is sent to a new vendor:

- 1 Open a one-time PO line with status **Sent**, or a continuous PO line with status **Sent** or **Waiting for auto/manual renewal**, for edit. The PO Line Summary page appears.

You cannot change the vendor of (and resend) a one-time PO line if any of its resources were already activated or received.

- 2 In the drop-down actions list at the top right of the page, select **Change Vendor** and click **Go**.

A confirmation dialog box appears. The message in this box states that the PO line will be sent again.

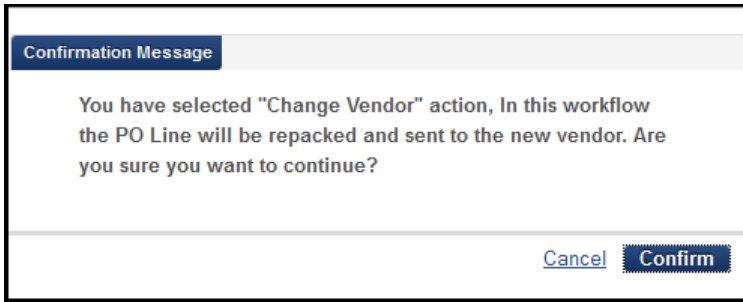


Figure 4 - Change Vendor Confirmation Dialog Box

- 3 Click **Confirm** in the confirmation dialog box. The Change Vendor in Order dialog box appears.

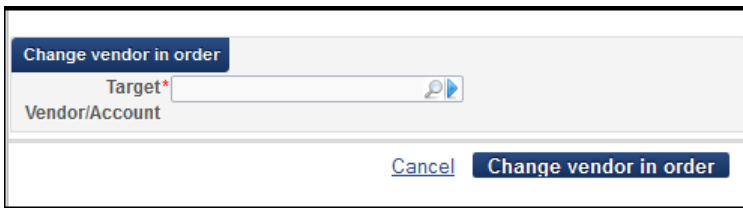


Figure 5 - Change Vendor In Order Dialog Box

- 4 Select a new vendor and click **Change Vendor in Order**. The vendor is changed. The PO line is removed from the PO, and if this is the only PO line in the PO, the PO is deleted. The PO line's status changes to **In Review** and progresses as usual through the purchasing workflow.

#### To change a vendor in a sent PO line without sending the PO line again:

- 1 Open a one-time PO line with status **Sent** or **Waiting for Invoice**, or a continuous PO line with status **Sent** or **Waiting for auto/manual renewal**, for edit. The PO Line Summary page appears.
- 2 In the drop-down actions list at the top right of the page, select **Replace (only) Vendor** and click **Go**.

A confirmation dialog box appears. The message in this box states that the PO line will not be sent again.

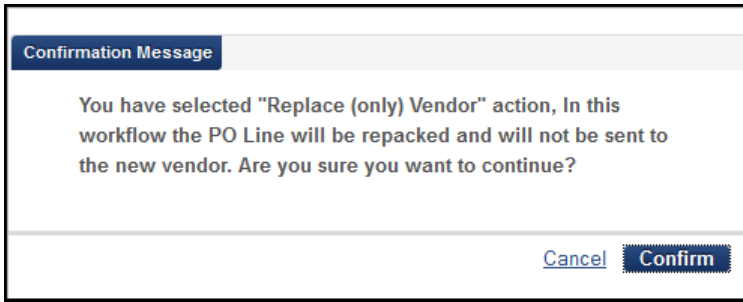


Figure 6 - Change Vendor Only Confirmation Dialog Box

- 3 Click **Confirm** in the confirmation dialog box. The Change Vendor in Order dialog box appears.

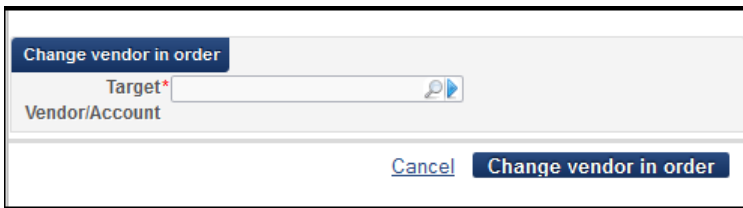


Figure 7 - Change Vendor Dialog Box

- 4 Select a new vendor and click **Change Vendor in Order**. The vendor is changed. The PO line is removed from the PO, and if this is the only PO line in the PO, the PO is deleted. The PO line's status changes to **Manual**.

## Invoice/License Audit History

Changes to invoices and licenses are now tracked and available to view in the History tab of the Invoice Details and License Details pages. (Note that support for changes at the invoice line level will be added in a future release.)

Tracked invoice changes include:

- The date and time of change
- The user that made the change
- The changed fields, with the old and new values

History				
Date	Operator	Field name	Old value	New value
09/10/2015 11:28 AM	System	Invoice total sum	102.38 USD	103.38 USD
09/10/2015 11:28 AM	System	Voucher amount		0.00 USD

Figure 8 - Invoice Details History Tab

## Link Closed/Canceled PO Lines to Licenses

### Description

It is now possible to link closed or canceled PO lines to licenses, including to deleted licenses. You can delete a license that is attached to PO lines. When you do so, the license's status changes to **Deleted** but it remains attached to the PO lines.

All PO lines linked to a license appear in a new tab on the License Details page of that license.

PO Lines			
License	Test License	Creation date	09/16/2015
Created by	Admin, User	License type	License
<a href="#">Summary</a>   <a href="#">License Terms</a>   <a href="#">Inventory</a>   <b><a href="#">PO Lines</a></b>   <a href="#">Amendments</a>   <a href="#">History</a>   <a href="#">Notes</a>   <a href="#">Attachments</a>			
Limit results to: <input type="text"/> Find: <input type="text"/> in: All <span>1 - 1 of 1 Records</span>			
Purchase Type <a href="#">Electronic Book - One Time (1)</a>	1 <a href="#">"L'être situé", Effectiveness and Purposes of International Law Essays in Honour of Professor Ryuichi Ida, [electronic resource] : (Ebrary), Leiden : BRILL, 2015., 9789004294288, ISBN MMS ID: 99208198710301161 CKB ID: 53815508740001161 Assigned to: - Type: Electronic Book - One Time Standard number: 9789004294288 Order/Line: PO-189985 / POL-223671 Total price: 161.00 USD Funds: law electronic book (100.0%) (FY-2016) Vendor/Account: YBP Library Services / YBP Library Services lybp Vendor reference ID: - Expected activation: 07/15/2015 License status: - Activation status: Activated E-Resource Sent Date: 07/07/2015 <a href="#">View</a>   <a href="#">Change Bib Reference</a>   <a href="#">Reopen</a></a>		
Vendor <a href="#">YBP Library Services (1)</a>			
Rush <a href="#">No Rush (1)</a>			
Library <a href="#">Pappas Law Library (1)</a>			
Assignment <a href="#">Undefined (1)</a>			
Acquisition Method <a href="#">Purchase at Vendor System (1)</a>			
Reporting Code <a href="#">Electronic Book (1)</a>			

Figure 9 - License Details Page, PO Lines Tab

This tab displays a list of relevant PO lines (the PO lines linked to this license), which you can filter using facets and/or by entering a search term in the **Find** field. For information about the actions available beneath each PO line, see **Searching for PO Lines** in the *Alma Acquisitions Guide* or the Alma Online Help.

## Step-by-Step Instructions

The following role can link a closed or canceled PO line to a license or view the PO lines linked to a license:

- License Manager

### To link a license to a closed or canceled PO line:

When editing a closed or canceled PO line, you can link it to a license, just as you previously could link a PO line with a different status to a license. For more information, see **Manually Creating a PO Line** in the *Alma Acquisitions Guide* or the Alma Online Help.

### To delete a license with associated PO lines:

Deleting a license with associated PO lines is similar to deleting any other license (this no longer results in an error message). The license can continue to be used. See **Deleting Licenses or Amendments** in the *Alma Acquisitions Guide* or the Alma Online Help.

## Other Acquisitions Enhancements

- Alma has improved searching using characters with diacritics, as well as returning characters with diacritics when you search using standard English characters (for example, a search for “u” matches “u”, “ü”, and so forth), in alphanumeric fields of the following entities:
  - **Licenses**, such as when you use the **Find** box on the Licenses and Acquisitions page
  - **E-Activation tasks**, such as on the Electronic Resource Activation Task List page
  - **Invoices**, such as on the Find Invoice page or in the persistent search box
  - **Patron-Driven Acquisitions**, such as on the Patron Driven Acquisition (PDA) List page
  - **POs**, such as on any PO related page (Review, Approve, and so forth)
  - **Vendors**, such as on the Search Vendor page or in the persistent search box

- **Trials**, such as on the Manage Trials page.

Searches on non-alphanumeric fields, such as dates or unique identifiers, were not affected.

- You can now search items on the In Process Items page using ISBN/ISSN. The identifier also appears as a column on the page.

The screenshot shows the 'In Process Items' page with a table of 20 items. The 'Identifier' column is highlighted with a red box. The table includes columns for Title, Identifier, Barcode, Status, Date received, End of Activity, Modified By, Modified Date, Requests, Cancel, Note, and Interested Users. The items listed include titles like '100 selected poe...', '1974 o ano que co...', 'ABC of reading [S...', 'Ach los, Scheiß d...', 'A clash of kings :...', 'A companion to Jo...', 'A comprehensive...', 'Adolescent rationa...', 'A duel of nations :...', 'African American...', 'After Bakhtin : ess...', 'Against the grain.', 'A guide to comput...', 'A history of wome...', 'Alan Bristow : heli...', 'Along the Silk Roa...', 'American constitut...', 'American experien...', 'American libraries.', and 'American libraries.'.

	Title	Identifier	Barcode	Status	Date received	End of Activity	Modified By	Modified Date	Requests	Cancel	Note	Interested Users
1	100 selected poe...	-	31863000...	Anal...	11/27/...	12/27/...	Ex Libris	11/2...	No re...			Actions
2	1974 o ano que co...	ISBN	-	Catal...	01/30/...	03/01/...	Ex Libris	01/3...	No re...			Actions
3	ABC of reading [S...	-	31863009...	Anal...	11/25/...	12/25/...	Ex Libris	11/2...	No re...			Actions
4	Ach los, Scheiß d...	9783938706435	-	Catal...	02/07/...	03/09/...	Ex Libris	02/0...	No re...			Actions
5	A clash of kings :...	-	31864000...	Repair	07/06/...	08/05/...	Ex Libris	07/0...	No re...			Actions
6	A companion to Jo...	9780470655580	-	Catal...	12/10/...	01/09/...	Ex Libris	12/1...	No re...	!		Actions
7	A comprehensive...	-	31863008...	Repair	08/03/...	09/02/...	Ex Libris	08/0...	No re...			Actions
8	Adolescent rationa...	1848728603 (hbk. : alk. paper)	31864000...	Repl...	08/29/...	09/28/...	Ex Libris	08/2...	No re...			Actions
9	A duel of nations :...	9780299291341	31864000...	Phys... Proc...	12/17/...	01/16/...	Ex Libris	12/1...	No re...	!		Actions
10	African American ...	-	31864000...	Phys... Proc...	08/26/...	09/25/...	Ex Libris	08/2...	No re...			Actions
11	After Bakhtin : ess...	-	31864000...	Phys... Proc...	08/26/...	09/25/...	Ex Libris	08/2...	No re...			Actions
12	Against the grain.	-	-	Routed	07/16/...	08/15/...	Ex Libris	07/1...	No re...			Actions
13	A guide to comput...	0240516710	31863007...	Anal...	11/08/...	12/08/...	Ex Libris	11/0...	No re...			Actions
14	A history of wome...	0789029847 (soft : alk. paper)	31864000...	Phys... Proc...	03/31/...	04/30/...	Ex Libris	03/3...	No re...			Actions
15	Alan Bristow : heli...	9781848842083	31864000...	Catal...	05/30/...	06/29/...	Ex Libris	05/3...	No re...			Actions
16	Along the Silk Roa...	-	31864000...	Phys... Proc...	08/26/...	09/25/...	Ex Libris	08/2...	No re...			Actions
17	American constitut...	0205108997 (pbk. : alk. paper)	31864000...	Repl...	08/29/...	09/28/...	Ex Libris	08/2...	No re...			Actions
18	American experien...	-	-	Catal...	08/19/...	09/18/...	Ex Libris	08/1...	No re...			Actions
19	American libraries.	-	-	Routed	01/08/...	02/07/...	Ex Libris	01/0...	No re...			Actions
20	American libraries.	-	-	Routed	05/14/...	06/13/...	Ex Libris	05/1...	No re...			Actions

Figure 10 - In Process Items Page

- In the Inventory tabs of the License Details and Vendor Interface Details pages, the resources list now appears split into **Active Electronic Collection Resources** and **Active Portfolio Resources**, and all holdings appear on the page (with pagination; instead of only the first 20 appearing).

Inventory Cancel Save

License AccessScience      Creation date 08/27/2013      Created by DePhillips, Linda      License type License

Summary   License Terms   **Inventory**   PO Lines   Amendments   History   Notes   Attachments

**Active Electronic Collection resources**

Find :  in : Resource name

1 - 1 of 1 Records   Columns

Resource Name	Active From
1 AccessScience (McGraw-Hill's AccessScience encyclopedia of...	01/01/2011

**Active Portfolio resources**

Find :  in : Resource name

No records were found.

**History of Resources**

Filter

No records were found.

Cancel Save

Figure 11 - License Details Page, Inventory Tab

Vendor Interface Details Cancel Save

Vendor name American Council of Learned Societies Vendor code ACLS

Interface Description - Interface Name ACLS Humanities eBook

Summary Contact Information Administrative Information Access Information Statistics Information Inventory Notes

Active Electronic Collection resources

Find:  in: Resource name Go

1 - 1 of 1 Records Columns Tools

Resource Name	Active From
1 ACLS Humanities E-Books (ACLS Humanities eBook)	01/01/2003

Active Portfolio resources

Find:  in: Resource name Go

1 2 3 Go 1 - 20 of 824 Records Columns Tools

Resource Name	Active From
1 1968. forty years after edited by Leszek W. Gluchowski and Antony Polonsky [ ...	-
2 The administration of Normandy under Saint Louis Joseph Reese Strayer [electr...	-
3 Adoration the deconstruction of Christianity II / Jean-Luc Nancy : translated by J...	-
4 Adverbs and functional heads a cross-linguistic perspective / Guglielmo Cinque...	-
5 Aesopic conversations popular tradition, cultural dialogue, and the invention of Gr...	-
6 Africa and Africans in the making of the Atlantic world, 1400-1800 John Thornton...	-
7 After colonialism imperial histories and postcolonial displacements / edited by G...	-
8 The Ahhiyawa texts by Gary Beckman, Trevor Bryce, Eric Cline, [electronic reso...	-
9 Alan of Lille's grammar of sex the meaning of grammar to a twelfth-century intell...	-
10 The Albanian national awakening, 1878-1912 by Stavro Skendi, [electronic resou...	-
11 Alexander's gate, Gog and Magog, and the inclosed nations Andrew Runni Ande...	-
12 Alien merchants in England, 1350 to 1377 their legal and economic position / Ali...	-
13 Amazons of the Huk rebellion gender, sex, and revolution in the Philippines / Vin...	-
14 American cinema, 1890-1909 themes and variations / edited by André Gaudreaul...	-
15 American cinema of the 1910s : themes and variations / edited by Charlie Keil a...	-
16 American Indian languages the historical linguistics of Native America / Lyle Ca...	-
17 American Jewish loss after the Holocaust Laura Levitt, [electronic resource] /	-
18 American law and the constitutional order historical perspectives / edited by Law...	-
19 American pentimento the invention of Indians and the pursuit of riches / Patricia...	-
20 American popular music and its business the first four hundred years / Russell S...	-

1 2 3 Go 1 - 20 of 824 Records Columns Tools

Cancel Save

Figure 12 - Vendor Details, Interface Tab

- In the Received Items List page for a continuous item (**Acquisitions > Receiving and Invoicing > Receive**; select the **Continuous** tab, select **Actions > Manage Items**), the Holdings Information area was cleaned up. Note that the holdings information appears only if **view\_holding\_in\_receivings** is set to **true** in **Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings** (this functionality did not change).

Received Items List [Back](#) [Save](#)

Description [MMS Holdings / Vendor / ISSN](#) Vendor/Account [EUGENE MCDERMOTT LIBRARY](#) Order/Line [Implementer, Ex ...](#)  
POL-38819

Status Waiting for Renewal (2015-07-07) Order line type Print Journal - Subscription PO Line Owner .Eugene McDermott Library Sent Date 10/25/2013

**Bibliographic Information**

Title AAHS Journal Identifier - Identifier Type ISSN Vendor's Title Number 037-721-339 Publication Place - Publisher AAHS title Publication Date - Frequency - Start/End - Language -

**Holdings Information**

Holdings Eugene McDermott Library, SpecColl Aviation, TL501 .A678  
MMS ID 22109978520001421

[Edit Holdings](#) [Tools](#)

LDR	00272cy a22001093 4500
001	683930
004	564427
005	20120424132914.0
008	0101050p 8 1001lueng0000000
583	__  x Checked in through Acquisitions. dm: 7/2008
852	0_  b MCDERMOTT  c sc-aviat  h TL501  i .A678
866	31  a vol. 25- (1980-)

[Edit Holdings](#) [Tools](#)

**PO line Items**

Receiving note Call # barcode (31864000581985).  
Sort routine [Description](#)

Receiving status [All](#) Location [All](#)

[Receive New Items](#) 1 2 3 [Go](#) 1 - 20 of 64 Records Columns [Tools](#)

Library	Location	Temp Loc	Date Receiv	Modifie	Call Number	Barcode	Description	Current Step
---------	----------	----------	-------------	---------	-------------	---------	-------------	--------------

Figure 13 - Received Items List for a Continuous Item

# Resource Management

The following sections describe new or changed Resource Management features in this release of Alma.

## Filter Sets

### Description

Alma has extended the functionality of sets by enabling you to filter existing sets to create new sets. This feature is especially helpful when you need a set that is based on metadata elements that are not indexed. You can now refine any set to include just the records that match the bibliographic record content regardless of whether the attributes are indexed or not. This feature fulfills a NERS enhancement request.

This feature is implemented using indication rules. Similar to normalization rules, indication rules use the flexible Drools logic to filter existing sets. With the Drools logic, you can filter a set to create a new set based on different characteristics, as shown in the following examples that may include non-indexed fields:

- Excluding government documents (where the 008 field byte 28 equals #, blank, or u)
- Bibliographic records that do not contain a MARC 074 or 086 field
- Limiting bibliographic records to print journals (where leader 06 record type = a or leader 07 bibliographic level = s)

In addition, you can check for brief bibliographic records or missing fields by using the Drools logic.

### Step-by-Step Instructions

The following roles can create indication rules and manage sets that use indication rules to filter existing sets:

- Cataloger
- Catalog Manager
- Catalog Administrator

### To filter existing sets using indication rules:

- 1 Open the Manage Sets page (**Resource Management > Search and Sets > Manage Sets**).
- 2 Locate the logical or itemized set that you want to refine, and select **Actions > Filter**.

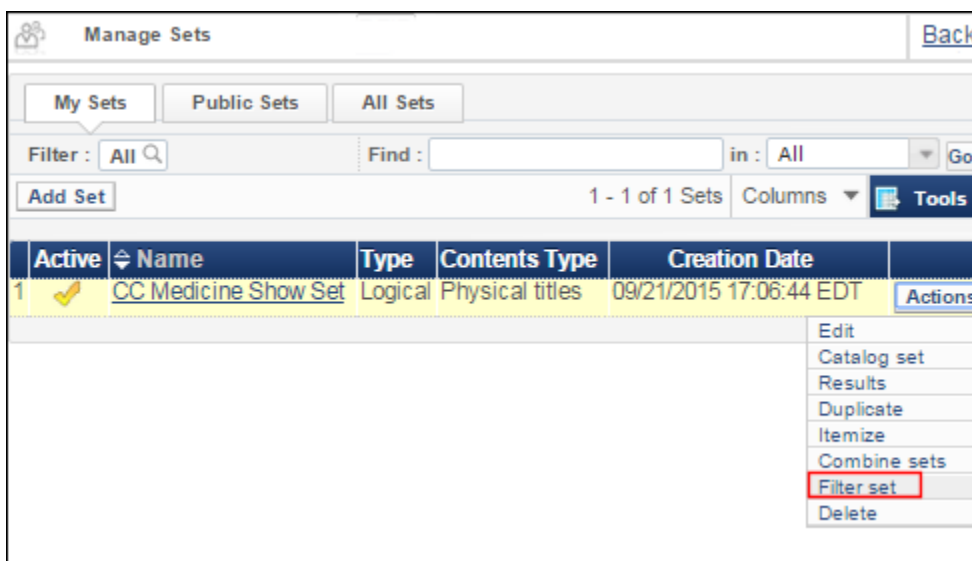


Figure 14 - Manage Sets for Filtering

The Set Details page appears.

- 3 Enter a new set name or use the one that is automatically generated by appending the date and timestamp to the original name of the set.
- 4 Select the indication rule that you created for refining this set. See the procedure **To create indication rules** below for additional information.

The screenshot shows the 'Set Details' page for a set named 'CC Medicine Show Set - filtered - 09/21/2015 17:42:30 EDT'. The 'General Information' section includes fields for Set name, Description, Note, Set content type (Physical titles), Private (No/Yes), Status (Active/Inactive), Status date (09/21/2015 17:06:44 EDT), Created by (admin), and Updated by (admin). The 'Filter set' section has a dropdown menu for 'Indication Rule' with the selected value 'CC Indication Rules Exists More Than', which is highlighted with a red border.

Figure 15 - Set Details Page Indication Rule

- 5 Complete the remaining options to match your requirements.
- 6 Click **Submit**. A confirmation message appears indicating how many records in your original set will be processed as part of your filtering request.

The screenshot shows a 'Confirmation Message' dialog box with the following text: 'Submitting this process will create an itemized set from set with 76 members. Note: this job might take a while, you will be notified upon completion. Do you want to proceed?'. At the bottom, there are two buttons: 'Cancel' and 'Confirm'.

Figure 16 - Submit Set for Filtering Confirmation Message

- 7 Click **Confirm** to proceed. The **Filter set by indication** job runs to process your filtering request and creates a new itemized set. The filtering process goes over all records in the defined set and applies the specified indications rules. Those records that meet the indication rules condition will be filtered out of the set. When the job is complete, the system sends an email to the user that initiated the request.

- 8 You can view progress or the job results for the **Filter Set by Indication** job on the Running and History tabs of Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

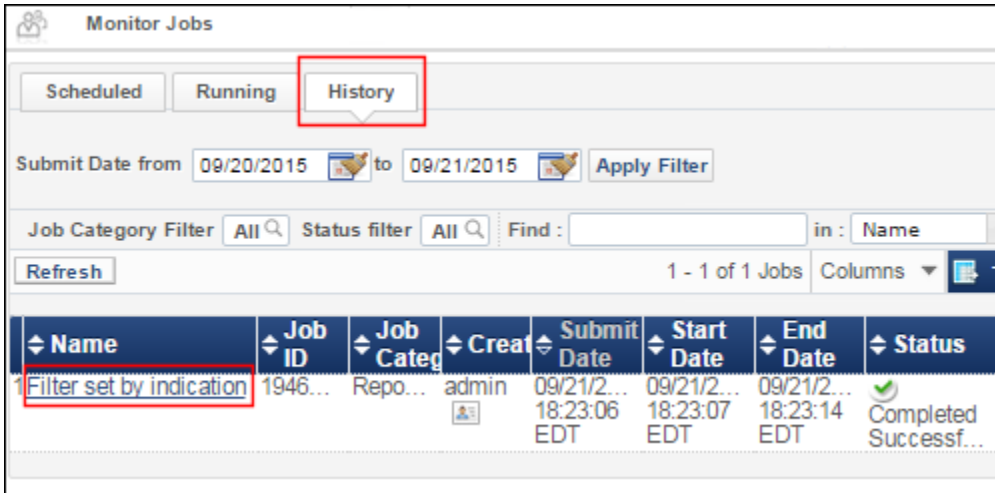


Figure 17 - Filter Set by Indication

- 9 Select **Actions > Report** to view the results. The report shows the number of records that were processed and the number of records that were created in the new, filtered set.

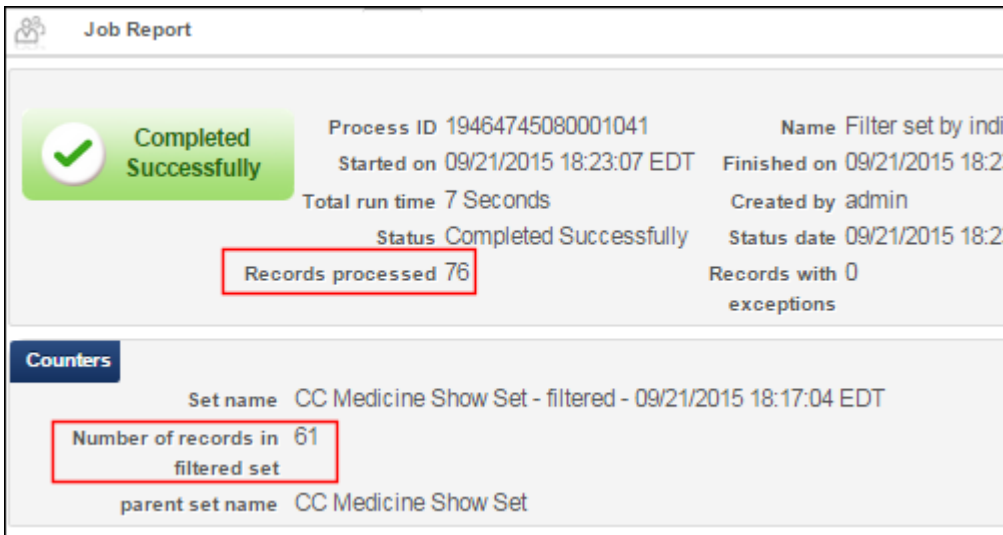


Figure 18 - Filter Set by Indication Job Report

The new set appears on the Manage Sets page (**Resource Management > Search and Sets > Manage Sets**) along with the original set from which it was created.

	Active	Name	Type
1	<input checked="" type="checkbox"/>	CC Medicine Show Set	Logical
2	<input checked="" type="checkbox"/>	CC Medicine Show Set - filtered - 09/21/2015 18:17:04 EDT	Itemized

Figure 19 - Resulting Filtered Set

**To create indication rules:**

- 1 Open the MD Editor (**Resource Management > Cataloging > Open Metadata Editor**).
- 2 Click **File > New > Indication rules**. The properties dialog box appears.

Normalization rules properties

Name\*

Description:

Private  Shared

Enabled

Figure 20 - Properties Dialog Box

- 3 Complete the parameters in the properties dialog box and click **Save**. The MD Editor editing pane appears.

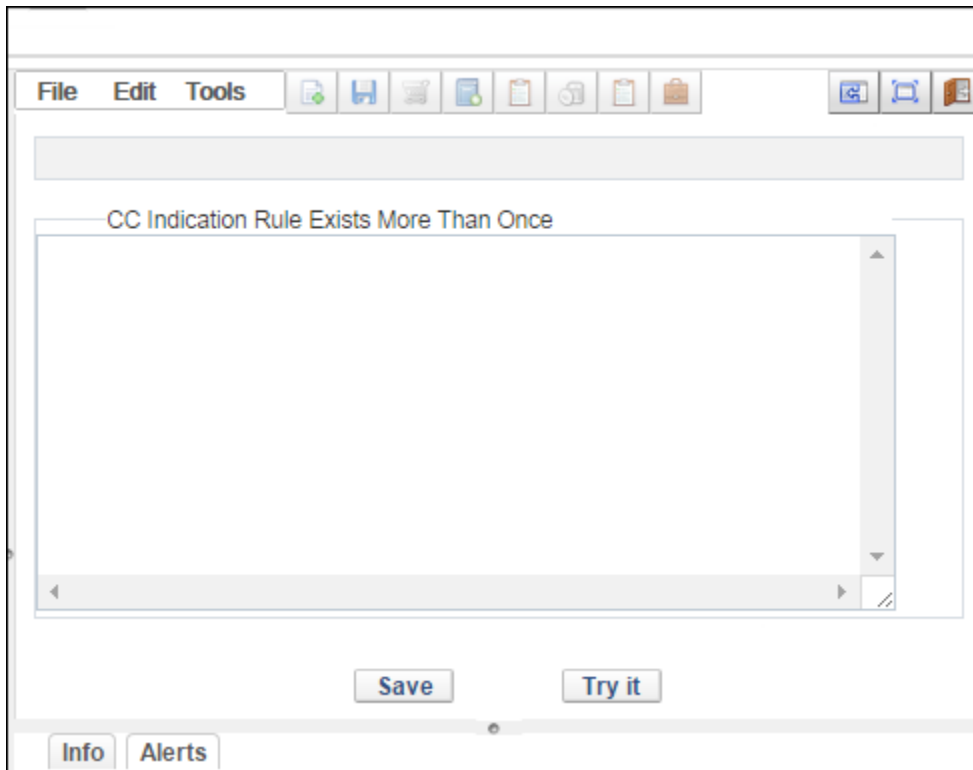


Figure 21 - Indication Rule Editing Pane

4 Enter the Drools logic for your indication rule. Refer to the section **Normalization Rules – Syntax and Examples** in *Alma Resource Management Guide* or Alma Online Help for the syntax to use when creating indication rules. The following indication rules are provided in Alma:

- MultiTitleIndication.dslr
- BriefIndication.dslr

```
drools/MultiTitleIndication.dslr
rule "Multi 245"
when
    existsMoreThanOnce "245"
then
    set indication."true"
end
```

Figure 22 - Indication Rule Provided (Multiple Titles)

```
drools/BriefIndication.dslr
rule "Brief 050 042 subjects"
when
  ((not existsControl "LDR.{17,1}. ") AND
   (not existsControl "LDR.{17,1}.1") AND
   (not existsControl "LDR.{17,1}.2") AND
   (not existsControl "LDR.{17,1}.4") AND
   (not existsControl "LDR.{17,1}.7"))
   OR (not exists "050")
   OR (not exists "042")
   OR (not exists "6**")
then
  set indication."true"
end
```

Figure 23 - Indication Rule Provided (Brief Subjects)

5 Click Save.

#### To test indication rules that you have created:

- 1 Open a bibliographic record in the MD Editor.
- 2 Click **Edit > Split Editor**.
- 3 Select the **Rules** tab in the left pane and expand the **Indication rules** folder.
- 4 Locate the rule that you want to test in the **Private** or **Shared** folder.
- 5 Click the rule name. The following options are available:
  - Edit
  - Delete
  - Duplicate
  - Properties

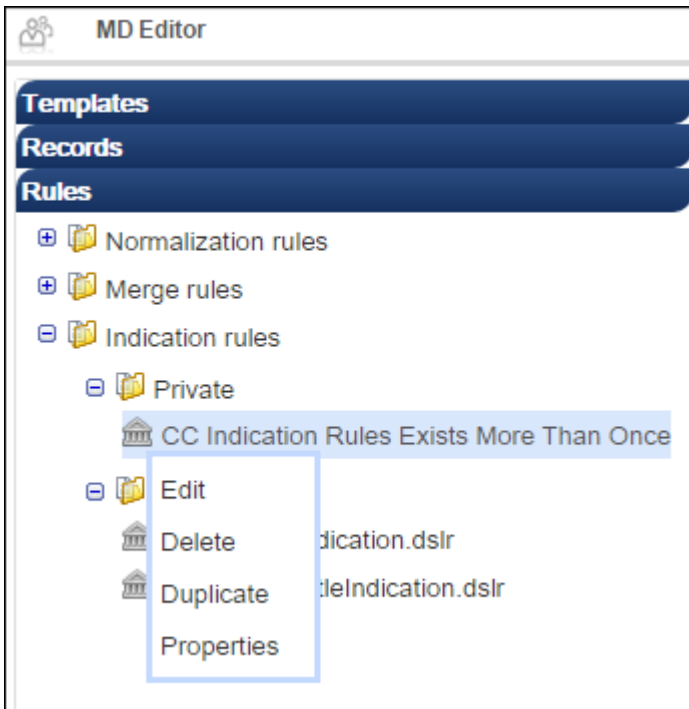


Figure 24 - Indication Rule Processing Options

6 Click **Edit**. The indication rule opens in the split screen next to the bibliographic record.

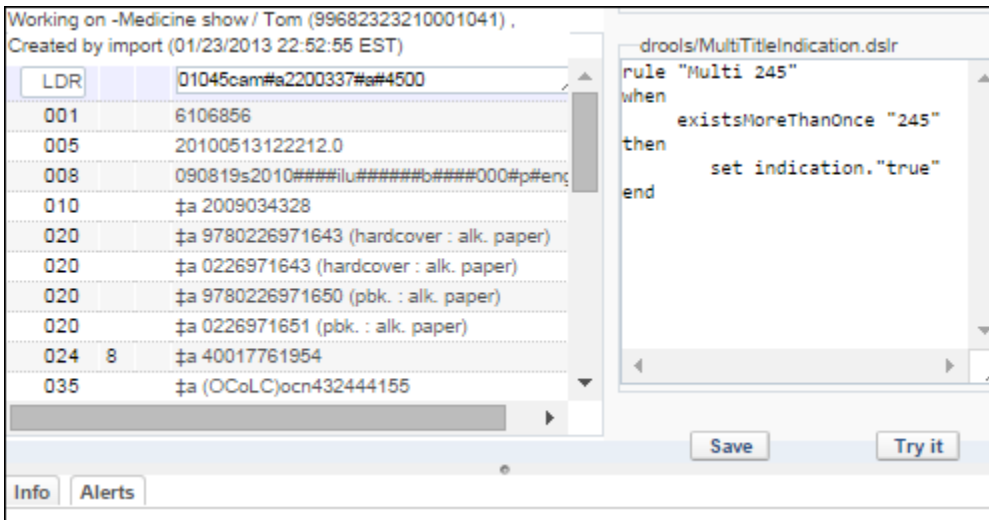


Figure 25 - Indication Rule Open in the Split Screen

- 7 Click **Try it**. Depending on the results, a pop-up appears with either a **true** or **false** response indicating that the bibliographic record either met or did not meet the Drool logic in the indication rule.

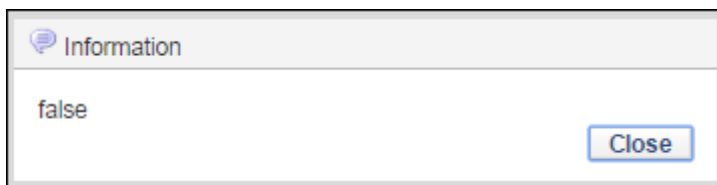


Figure 26 - Indication Rule Try It Response

## Publishing Electronic Holdings to Libraries Australia

### Description

Libraries can now synchronize their electronic holdings with Libraries Australia. Previously, this capability existed only for print holdings.

The implementation of this feature is similar to the implementation for print holdings with some additional options available in the Libraries Australia publishing profile. The 984 field continues to be used for publishing both print and electronic holdings, and the add, update, and delete processes are handled for electronic holdings in the same manner as they are for print. The file published to Libraries Australia contains both print and electronic holdings.

### Step-by-Step Instructions

The following roles can configure the Libraries Australia publishing profile and mapping:

- Catalog Administrator
- Repository Administrator
- General System Administrator

## To configure the Libraries Australia publishing profile for electronic holdings:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** under Record Export. The Publishing Profiles page appears.
- 2 Select **Actions > Edit** for the **Publish Holdings to Libraries Australia** row. The Publishing Profile Details page appears.

**Publishing Profile Details**

**Profile Details**

Profile name\* Publish holdings to Libraries Australia

Profile description Upload Holdings to Libraries Australia

NUC Code\* DATA

Run full publishing

**984 Content - Physical Holdings**

\*  Call number  
 Label HELD

**984 Content - Electronic Holdings**

Publish Electronic Holdings  Label Online: Not available for loan

**Submission Format**

FTP configuration\* Connection Type FTP RM Sub-directory\* LA\_publishing

Status  Active  Inactive

Scheduling Not scheduled

Figure 27 - Publishing Profile Details Page for Libraries Australia

The print settings that you previously have saved are located under the section heading **984 Content – Physical Holdings**. The **984 Content – Electronic Holdings** section appears for your electronic settings.

- 3 Select the **Publish Electronic Holdings** check box. This is effective for electronic holdings that are published to Libraries Australia from this point forward when the electronic holdings bibliographic records are new or updated and are flagged with the **Export to Libraries Australia** set management tag set to **Publish bib**.

- 4 Enter the label content that you want to appear for the electronic holdings. The default label content for this parameter is **Online: Not available for loan**.
- 5 Click **Save**.

The next time that the Libraries Australia publishing profile is run with the **Publish Electronic Holdings** parameter selected, the records are handled in the following manner:

- The system creates one 984 field and all the associated holdings information for records that have both electronic and physical holdings with the same NUC code. For example:

984 \$a NSL \$c M Q823.912/ W187.1/ 4 \$c Online: Not available for loan

The first \$c holds the physical information, and the second \$c holds the electronic information. Since the electronic holdings do not have call numbers, only the label is published in \$c for the electronic holdings.

- Mapping of the NUC is handled in the following manner:
  - If the portfolio has an owning library, the owning library's NUC is used.
  - If there is no portfolio owning library NUC, the NUC of the collection's owning library is used.
  - If there is no portfolio or collection owning library NUC, the default NUC identified in the **NUC Code** parameter of the publishing profile is used.
- Only active portfolios are processed for publishing.
- A NUC is sent as deleted only when all the holdings (both print and electronic) are deleted. When only the print holdings is deleted, the records are sent as updated with only the electronic holdings.

## Staff Search Enhancements

### Description

The interface in Alma for managing digital representations has been enhanced:

- Alma can display a thumbnail image for titles. If the title has a digital file, a thumbnail of that file appears. If the title has only physical items, Alma attempts to acquire a thumbnail image of the cover using the title's ISSN or ISBN. If no thumbnail is available, a generic image of the material type (book, video, music, etc.) appears.

- There is now a representations link for digital titles in the repository search. This link allows you to manage digital representations.

## Step-By-Step Instructions

The following roles can configure thumbnail display:

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

### To view thumbnails (available to all user types):

Search for digital titles in the repository. Results, such as the following, appear.






1		<p><b><a href="#">Load colorful painting images</a></b>  <b>Book</b> By Paintings (1981)            SIP: 114829950000121 Update Date: 25/06/2015            Language: English Record number: (OCoLC)ocm15265726113  <b>Availability:</b> <a href="#">Paintings</a> of type Master (3 file/s)</p> <p><a href="#">View It</a>   <a href="#">Representations</a>   <a href="#">Export</a>   <a href="#">Publishing information</a>   <a href="#">More info</a></p>
2		<p><b><a href="#">Sunset in the desert</a></b>  <b>Book</b> By Single file in Representation (1981)            SIP: 114829930000121 Update Date: 25/06/2015            Language: English Record number: (OCoLC)ocm17895726119  <b>Availability:</b> <a href="#">Single file in Representation</a> of type Master (1 file/s)</p> <p><a href="#">View It</a>   <a href="#">Representations</a>   <a href="#">Export</a>   <a href="#">Publishing information</a>   <a href="#">More info</a></p>
3		<p><b><a href="#">Mixed content: Audio, Video, PDF and JPG files</a></b>  <b>Book</b> By Mixed content (1981)            SIP: 114829910000121 Update Date: 25/06/2015            Language: English Record number: (OCoLC)ocm17895726112  <b>Availability:</b> <a href="#">Mixed content</a> of type Master (5 file/s)</p> <p><a href="#">View It</a>   <a href="#">Representations</a>   <a href="#">Export</a>   <a href="#">Publishing information</a>   <a href="#">More info</a></p>
4		<p><b><a href="#">The Sea Life London Aquarium</a></b>  <b>Book</b> By Sea Life (1945)            SIP: 114829860000121 Update Date: 25/06/2015            Language: English Record number: (OCoLC)ocm17892725112  <b>Availability:</b> <a href="#">Sea Life</a> of type Master (6 file/s)</p> <p><a href="#">View It</a>   <a href="#">Representations</a>   <a href="#">Export</a>   <a href="#">Publishing information</a>   <a href="#">More info</a></p>
5		<p><b><a href="#">The beauty of Flowers</a></b>  <b>Book</b> By Flowers (1945)            SIP: 114829830000121 Update Date: 25/06/2015            Language: English Record number: (OCoLC)ocm17893725213  <b>Availability:</b> <a href="#">Flowers</a> of type Master (5 file/s)</p> <p><a href="#">View It</a>   <a href="#">Representations</a>   <a href="#">Export</a>   <a href="#">Publishing information</a>   <a href="#">More info</a></p>

Figure 28 – Digital Titles

The **Representations** link replaces the former **Edit** and **View** links.

Thumbnail images appear for the titles.

### To configure the thumbnail display:

- 1 Open the Repository Search Configuration page (**Resource Management > Resource Configuration > Configuration Menu > Search Configuration > Repository Search**). The following appears:

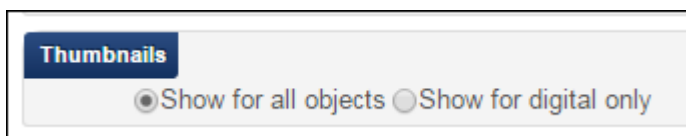


Figure 29 – Thumbnail Configuration

- 2 Select an option:
  - **Show for all objects** – Thumbnails appear for all types of items.
  - **Show digital only** – Thumbnails only appear for digital items.
- 3 Click **Save**.

For detailed information on these functions, see the *Alma Resource Management Guide* or Alma Online Help.

## Other Resource Management Enhancements

- Alma is introducing support for RVK (Regensburger Verbundklassifikation) authority records in the Community Zone. Updating the Community Zone with RVK records will occur during November and be fully available with the Alma December 2015 release.
- When using an API (GET bib via API), general publishing, or export to retrieve bibliographic records from an Alma institution, Alma returns the MMS ID of the institution's record in the MARC 001 field. In addition, Alma now returns the associated MMS ID from the Community Zone and/or Network Zone in a MARC 035 field (when they exist) in the following manner:

- Institution Zone MMS ID (existing function, no change)

```
<controlfield tag="001">IZ_MMS_ID</controlfield>
```

Example:

```
<controlfield tag="001">9966347601866</controlfield>
```

Figure 30 - Exported Institution Zone MMS ID

- Network Zone MMS ID with a prefix of (EXLNZ – Network Code)

```
<datafield tag="035" ind1=" " ind2=" ">
```

```
<subfield code="a">(EXLNZ-NETWORK_CODE)NZ_MMS_ID</subfield>
```

```
</datafield>
```

Example:

```
<datafield ind1=" " ind2=" " tag="035">
  <subfield code="a">(EXLNZ-01ALLIANCE_NETWORK) 99108122260001451</subfield>
</datafield>
```

Figure 31 - Exported Network Zone MMS ID (with Prefix)

- Community Zone MMS ID with a prefix of (EXLCZ)

```
<datafield tag="035" ind1=" " ind2=" ">
```

```
<subfield code="a">(EXLCZ)CZ_MMS_ID</subfield>
```

```
</datafield>
```

Example:

```
<datafield tag="035" ind1=" " ind2=" ">
  <subfield code="a">(EXLCZ) 9966348601867</subfield>
</datafield>
```

Figure 32 - Exported Community Zone MMS ID (with Prefix)

- Alma Z39.50 server support was expanded to support UNIMARC. When a Z39.50 call to Alma specifies the UNIMARC format, Alma responds with the Z39.50 `presentResponse` output in UNIMARC format. The availability indication is handled using the following UNIMARC format:
  - MARC 852 field
  - \$a Location – Institution code
  - \$6 Linkage – MMS ID

- \$9 Local field – P (print) / E (electronic) / D (digital)

When more than one material type is available for an institution, such as print and electronic, the 852 field contains multiple \$9 entries.

- When exporting or importing records, Alma now provides the crosswalk capability to transform the records from KORMARC to MARC 21 and from MARC 21 to KORMARC.
- You can now run normalization jobs on KORMARC and UNIMARC sets on the Manage Jobs page.

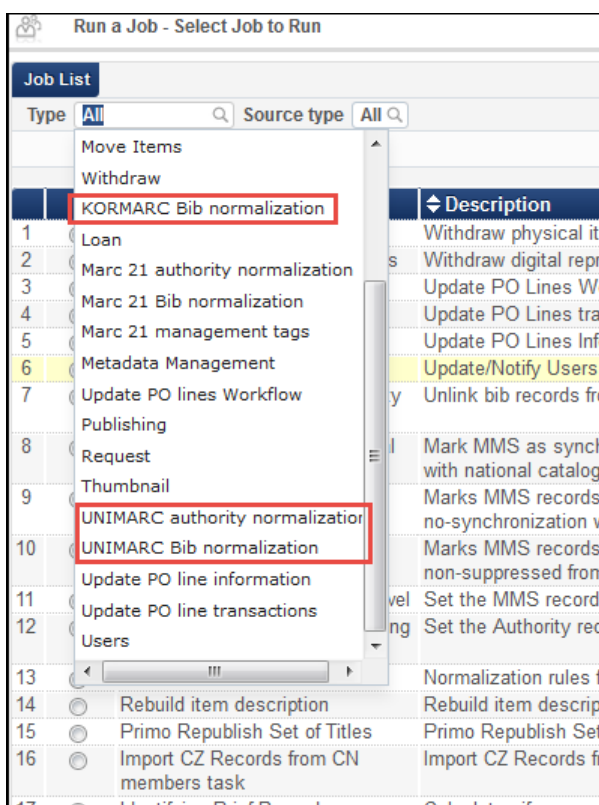


Figure 33 - Job Types

- Previously, you had to wait for an electronic activation to complete before you could initiate another one. You can now initiate as many electronic activations as you like. Each activation is queued and, while it is waiting to start, appears on the Running tab of the Monitor Jobs page with the status **Queued** (**Queued** is not the same as the existing **Pending** status, which is for jobs that will start as soon as system resources are available).

Name	Job Category	Creator	Submit Date	Start Date	Progress	Status	Actions
1 Electronic activation job - EBSCOhost Education Full Text	Repository	exl_impl	13/10/2015 10:27:39 IDT	-	N/A	Queued	Actions
2 Electronic activation job - EBSCOhost MegaFILE	Repository	exl_impl	13/10/2015 10:27:29 IDT	-	N/A	Queued	Actions
3 Electronic activation job - EBSCOhost Advanced Placement Source	Repository	exl_impl	13/10/2015 10:27:17 IDT	-	N/A	Queued	Actions
4 Electronic activation job - EBSCOhost History Reference Center	Repository	exl_impl	13/10/2015 10:27:05 IDT	13/10/2015 10:	N/A	Running	Actions

Figure 34 - Monitor Jobs Page with Queued Jobs

- The persistent search drop-down menu now includes an option for digital titles instead of digital files.

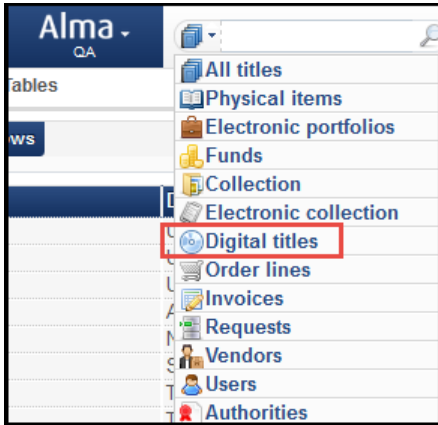


Figure 35 - Persistent Search Drop-Down List

- A **Public Note** field was added to the physical item Quick Cataloging page.

Quick Cataloging Save

**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

Course Restricted

Suppress from Discovery

**Item Information**

Library \* Eugene McDermott Library

Location \*

Barcode

Material Type

Item policy

Public note

Save

Figure 36 - Physical Item Quick Cataloging Page

- Note that when creating an integration profile to upload electronic holdings for Elsevier, the integration profile code and name are **ELSEVIER**, and they cannot be changed. In addition, note that the scheduling option in this profile was changed from Sunday to Saturday.
- When configuring an import profile, if you select **Binary** for **Physical source format**, a new **Encoding format** field enables you to select the encoding. You can select **ISO8859\_1** or **UTF-8**. Previously, all encoding was done using ISO8859\_1.

# Fulfillment

The following sections describe new or changed Fulfillment features in this release of Alma.

## Reading List Citations Display Demand Information from Other Reading Lists

### Description

You can now see whether a citation is required by other lists when viewing a citation. This enables you to process the citation in a better planned manner, for example by ordering enough copies for all lists in one order.

When a citation appears in multiple reading lists, this is noted in the citation on the Edit Reading List page. The note appears in red as **Demand in Other Lists**.

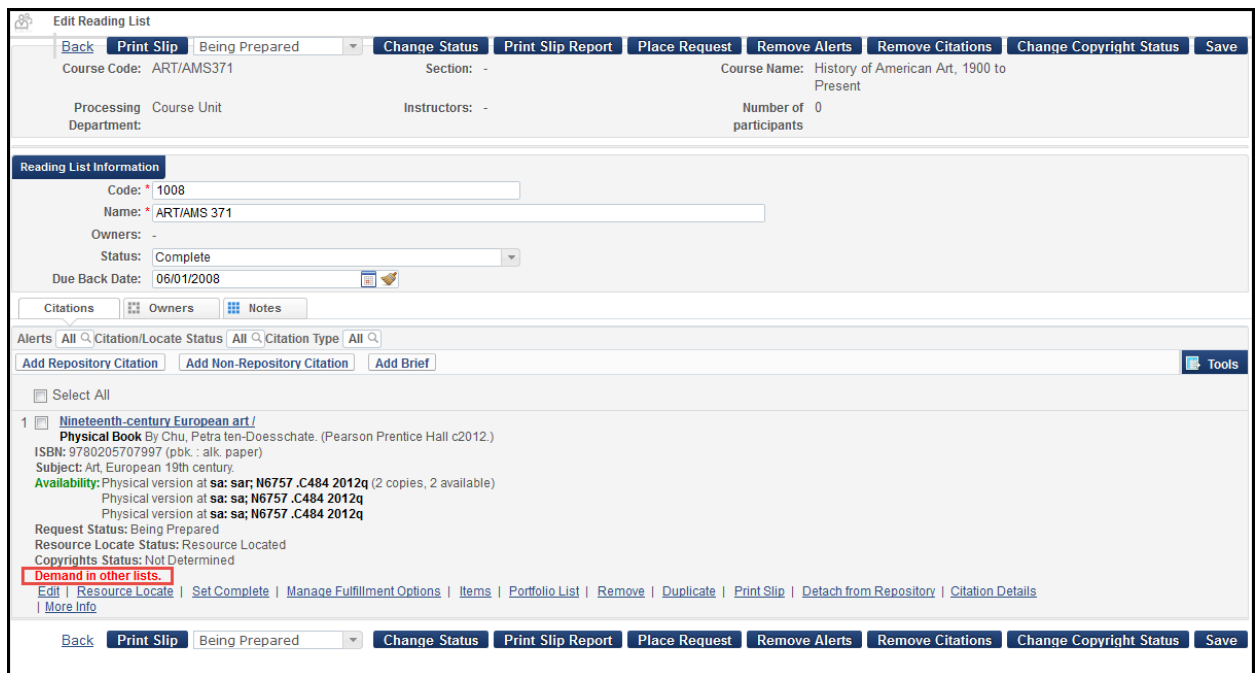


Figure 37 - Edit Reading List Page, with Demand in Other Lists Note

For more information about this page, see **Managing Citations** in the *Alma Fulfillment Guide* or *Alma Online Help*.

Additional information appears in new sections on a citation's Manage Fulfillment Options page. This information shows the additional demand for the reading list citation. For more information about this page, see **Managing Citation Fulfillment Options** in the *Alma Fulfillment Guide* or Alma Online Help.

**Manage Resource Options** Cancel Update Move Expiry Remove Alerts Place Request

1 out of 1 requests were successful. 0 Due back dates were modified. 0 resource is already in the desired location.

Title: Nineteenth-century European art / Author: Chu, Petra ten-Doesschate. ISBN: 0205707998 (pbk. : alk. paper)  
 Place Of Publication: Upper Saddle River, NJ ::Pearson Prentice Hall Chapter: - Pages: -  
 Additional Person Name: - Year: c2012. Edition: 3rd ed.  
 Call Number: N6757  
 Note: -  
 Alerts: -

**Course Details**

Course Code: ART/AMS371 Section: - Course Name: History of American Art, 1900 to Present  
 Number of participants: 0 Reading List name: ART/AMS 371  
 Demanded for 2 courses with overall 0 participants.

**Electronic Services**  
 No records were found.

**Digital Services**  
 No records were found.

**Physical Services**

1 - 3 of 3 Records Columns Tools

Library	Location	Call Number	No. of Items	Available	Actions
1 Marquand Library (SA)	sa Marquand: Resene	N6757 .C484 2012q	2	2	Actions
2 Marquand Library (SA)	sa Marquand Library	N6757 .C484 2012q	0	0	Actions
3 Marquand Library (SA)	sa Marquand Library	N6757 .C484 2012q	0	0	Actions

**This Record In Other Lists** Columns Tools

Course Code	Course Name	Section Id	Academic Department	Processing Department	Instructor	Start Date	End Date	Number Of Particip	Reading List Name	Reading List Status	Section Name	Citation Status	Actions
1 ART 212	Neoclas... to Impresi...	-	Art and Archaeol...	Course Unit	-	02/0...	05/2...	0	ART 212	Complete	Section name n/a	Complete	Actions

Filter Requests By Record In Other Lists  Columns Tools

1 - 1 of 1 Records Columns Tools

1 Nineteenth-century European art / Petra ten-Doesschate Chu.  
 ID: 19475181240001041  
 Place In Queue: 0  
 Pickup Location: Annex A, Forrestal Annex (ANXA) Request Date: 10/13/2015  
 Managed By Library: Marquand Library (SA) Managed By Desk: Default Circulation Desk  
 Workflow Step: Pickup From Shelf Process Status: New Process Date: 10/13/2015 Expiration Date: 10/20/2015  
 Request Type: Move temporarily  
 Course Name: Neoclassicism to Impressionism Reading List Name: ART 212 Section Name: Section name n/a  
[View Audit Trail](#) | [Edit](#) | [Cancel](#) | [Update Expiry](#) | [Mark as Missing](#) | [Print Slip](#) | [View title in search](#)

Cancel Update Move Expiry Remove Alerts Place Request

Figure 38 - Manage Resource Options Page

The new sections (highlighted above) are:

- **Course Details** – Details about the course associated with the reading list, including:

- **Course Code** – The course code
- **Section** – The course section
- **Course Name** – The course name
- **Number of Participants** – The number of participants associated with the course
- **Reading List Name** – The reading list name

The information also includes the total number of participants in all courses in which this citation appears.

- **This Record in Other Lists** – The citation as it appears in other reading lists. For each related reading list, the information appearing includes:
  - **Course Code**
  - **Course Name**
  - **Section Id** – The course section
  - **Academic Department**
  - **Processing Department**
  - **Instructor**
  - **Start Date**
  - **End Date**
  - **Number of Participants**
  - **Reading List Name**
  - **Reading List Status**
  - **Section Name** – The reading list section
  - **Citation Status**

For each other reading list in which the citation appears, you can perform one of the following actions:

- View the citation in the other reading list (**Actions > View**).
- Place a request on the citation (**Actions > Place Request**). The request you place is associated with the other reading list, and not the reading list currently being worked on (the functionality to place a request on the reading list currently being worked on already exists).

- **Filter Requests by Record in Other Lists** – Requests associated with the citation’s bibliographic record appear at the bottom of the page (this feature already exists). This new drop-down can be used to filter the list of requests to only those that are associated with a specific reading list.

New fields appear in the list of requests on the bottom of the Manage Fulfillment Options page. These fields also appear on any list on which a request appears. For example, the following shows requests on the Resource Request Monitoring page.

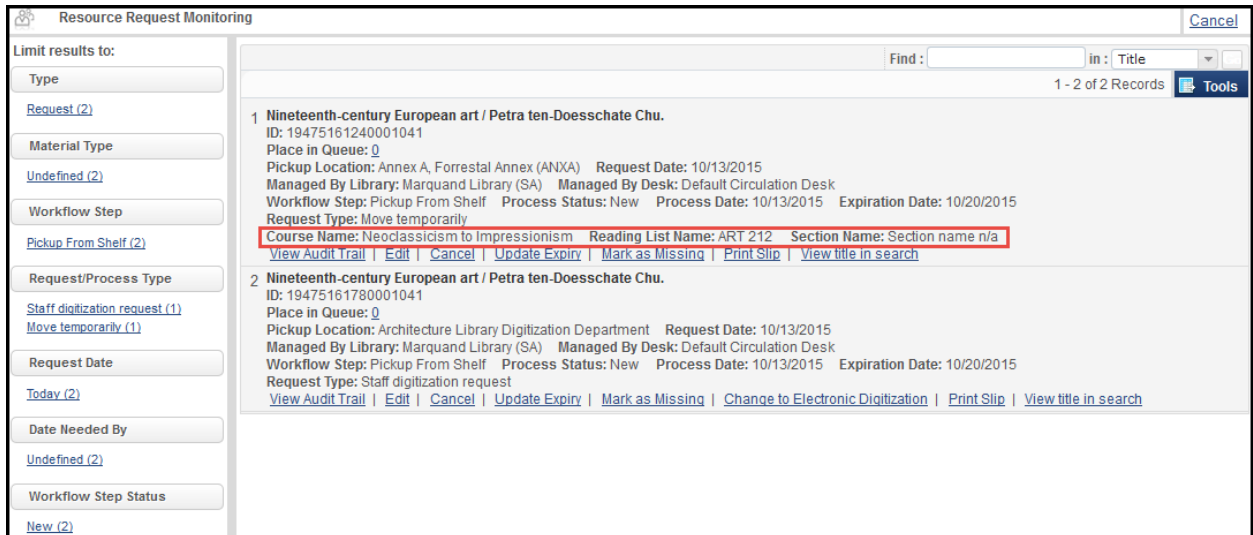


Figure 39 - Resource Request Monitoring Page

The first item in the above figure is a request associated with a citation.

The new fields are:

- **Course Name**
- **Reading List Name**
- **Section Name**– The reading list section

# Configuring Self-Check Machine Messages

## Description

A new configuration code table, Self-Check Messages (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Self-Check Messages**) enables you to edit messages for check-in, check-out, and renew on self-check machines.

The screenshot shows a web-based configuration interface for a 'Code Table'. At the top, it indicates the user is configuring the 'University of Texas at Dallas' and provides a link to the 'Organization Unit List'. The interface includes a 'Table Information' section with the following details:

- Sub System: FULFILLMENT
- Table Name: Self Check Messages
- Updated By: -
- Updated on: -
- Table Description: Self Check Block Messages for Ch
- Table code: SelfCheckMessages

Below this information is a dropdown menu showing 'Self Check Block Messages for Check-In, Check-Out, Renew'. A 'Tools' button is visible on the right side of the interface.

	Code	Description	Updated By	Last Updated	
1	401163	Cash - Limit of {0} exceeded. User has {1}.	-	-	Customize
2	401161	Item cannot be loaned due to Loan Limit rules cc	-	-	Customize
3	401172	Item cannot be loaned due to booking request	-	-	Customize
4	401153	Item cannot be loaned from this circulation desk	-	-	Customize
5	401605	Item cannot be loaned to patron - insufficient due	-	-	Customize
6	401160	Item cannot be returned at this circulation desk	-	-	Customize
7	401159	Item has not been received by Acquisitions Dep	-	-	Customize
8	401158	Item is currently on loan by another patron	-	-	Customize
9	401157	Item is currently on loan by this patron	-	-	Customize
10	401164	Item is not loanable	-	-	Customize
11	401167	Item is not renewable	-	-	Customize
12	401154	Item is on Hold Shelf for this patron	-	-	Customize
13	401155	Item is on hold shelf for another patron	-	-	Customize
14	401156	Item is requested by another patron	-	-	Customize
15	401152	Item not found.	-	-	Customize
16	401166	Item renew period exceeded	-	-	Customize
17	401162	Overdue - Limit of {0} exceeded. User has {1}.	-	-	Customize
18	401178	Overdue Recalls - Limit of {0} exceeded. User h	-	-	Customize
19	401174	Renewing the loan conflicts with a booking requ	-	-	Customize
20	401171	The item cannot be renewed since there is a rec	-	-	Customize
21	401169	The item status is "{0}" and cannot be renewed	-	-	Customize
22	401173	The loan conflicts with a booking request and th	-	-	Customize
23	401151	User does not have a patron role or the role has	-	-	Customize

At the bottom of the interface, there are 'Cancel' and 'Customize' buttons.

Figure 40 - Self-Check Messages

## Step-by-Step Instructions

The following roles can configure self-check machine messages:

- General System Administrator
- Fulfillment Administrator

### To configure self-check machine messages:

- 1 On the Self-Check Messages page, click **Customize** in the row of the message that you want to configure.
- 2 Enter the new message in the **Description** field.  
Repeat these two steps for all messages that you want to configure.
- 3 When you are done, click **Customize** at the top or bottom left of the page to save your changes.

## Patron Blocking Due to Overdue Loans

### Description

You can now implement a blocking policy so that a loan that is returned overdue will trigger a block on the user record, according to the defined policy. The block policy may be set separately for each Terms of Use.

The block may be selected for a period of time depending on the time the loan is overdue (based on only open days or all days), or may be for a fixed time. The block is automatically lifted once the configured expiry date passes, as part of the Users – Remove Blocks job.

## Step-by-Step Instructions

The following roles can configure blocking policies:

- General System Administrator
- Fulfillment Administrator

The following roles can view user blocks:

- User Manager

- User Administrator

**To configure a blocking policy:**

- 1 Access the Fulfillment Terms of Use (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**).
- 2 Add a new loan Terms of Use or edit an existing one.

The screenshot displays the 'Terms of Use Details' configuration interface. At the top, it indicates 'You are configuring: QA - Provisioning'. The main form area contains fields for 'Name' and 'Description'. Below this is a list of configuration options, each with a dropdown menu and an 'Actions' button. The 'Block When Overdue' option is highlighted in yellow, and its dropdown menu is open, showing the selected option: 'No block when overdue (Do not create a block when overdue)'. Other options include 'Is Loanable', 'Is Recallable', 'Due Date', 'Requested Item Due Date', 'Recall Period', 'Renew Fee', 'Lost Item Fine', 'Lost Item Replacement Fee', 'Lost Item Replacement Fee Refund Ratio', 'Maximum Fine', 'Overdue Fine', 'Recalled Overdue Fine', 'Grace Period', 'Is Renewable', 'Maximum Renewal Period', 'Closed Library Due Date Management', 'Cancelled Recall Due Date', and five 'Overdue Notification Fine Type' options.

**Figure 41 – Configure Blocking Term**

The Terms of Use defaults to no block when overdue.

- To create the block, select the blank line from the drop-down, and select **Add Policy** from the **Actions** menu.

The screenshot shows the 'Policy Details' form for 'QA - Provisioning'. The 'Policy Type' is 'Block When Overdue'. The 'Policy Name' is 'Greater than one month overdue'. The 'Value Type' is 'Other' with a value of '1'. The 'Unit Of Measurement' dropdown is open, showing options: All Days, Days per Overdue Days, Months, Open Days, Open Days per Open Overdue Days, and Weeks. The 'Default Policy' is 'False'.

Figure 42 – Add Blocking Policy

- On the Policy Details page, select **Value type** of **Other**. Enter a number in the **Value** field. Then select from the **Unit of Measurement** drop-down list.

**Note:** If **Days per Overdue Days** or **Open Days per Overdue Days** is selected as a unit of measurement, the calculation is  $\langle \text{Overdue} / \text{Open overdue days} \rangle * \langle \text{Value} \rangle$ .

### To view user blocks:

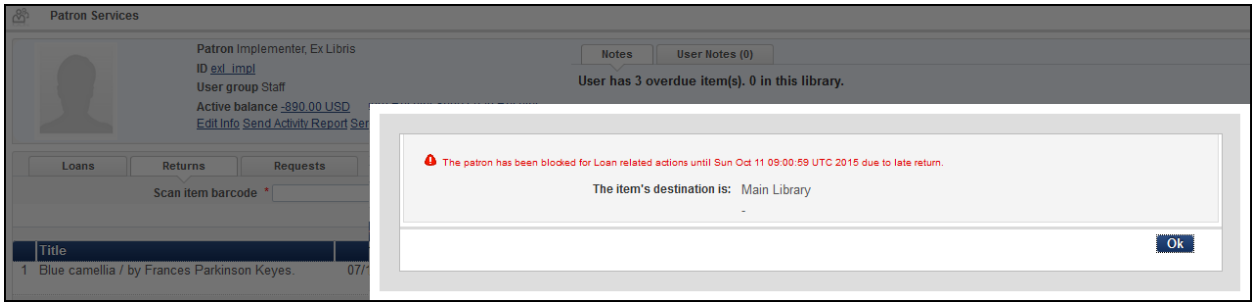
- Search for a user in Find and Manage Users. Click the **Blocks** tab to see all active blocks on this user (including the block's expiry date).

The screenshot shows the 'User Details' page for 'Implementer, Ex Libris'. The 'Blocks' tab is selected, showing a table with one record:

Active	Type	Description	Note	Owner	Expiry Date
1	Loan	Overdue Loan Block	Block created for overdue loan. Bar...	QA - Provisioning	11/10/2015

Figure 43 – View User Blocks

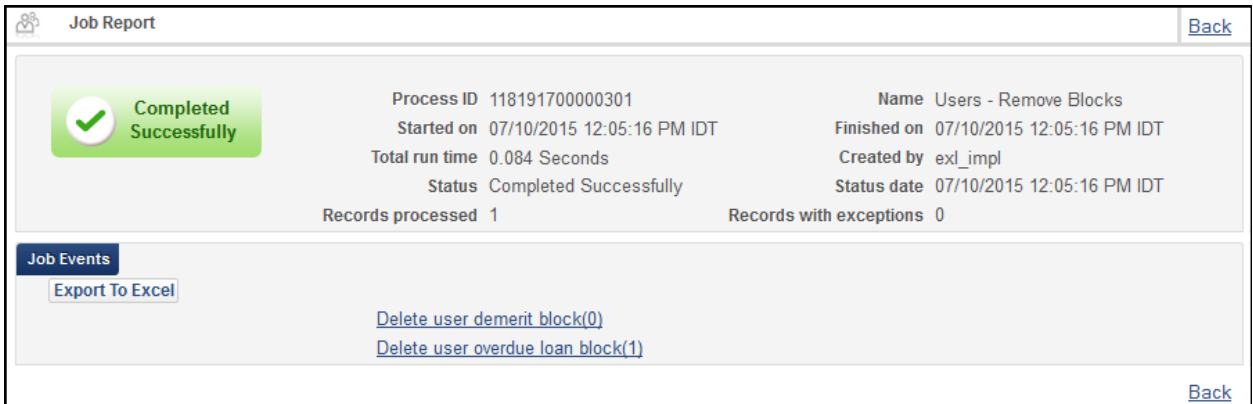
The block also displays when trying to perform certain actions, such as loaning an item.



**Figure 44 – User Block Pop-up**

**To view removed user blocks:**

User blocks that have passed their expiry date are automatically removed when the **Users – Remove blocks** job runs. To view the blocks that were removed, access **Monitor Jobs**. Find the **Users – Remove Blocks** job.



**Figure 45 – Users - Remove Blocks Job**

Within the report, click the link **Delete user overdue loan block**.

Deleted overdue loan block	
Description	Delete user overdue loan block
Deleted overdue loan block	
1 - 1 of 1 Records	
Columns <span>▼</span> <span>Tools</span>	
Primary identifier	Note
1 exl_impl	Block created for overdue loan. Barcode: 30792

Figure 46 – Deleted Block Information

## New Options for Digitization Profile Rules

### Description

The digitization profile rules can now be configured to automatically affect the copyright and approval process according to the time span (in calendar years) and request type. Time span is based on the creation date of the matched copyright record entries.

The outputs have new options for controlling the workflow. You can set the approval and copyright clearance to continue in parallel to the digitization workflow, block the digitization workflow, or be automatically approved.

### Step-by-Step Instructions

The following roles can configure the digitization profile rules:

- General System Administrator
- Fulfillment Administrator

#### To configure digitization profile rules:

- 1 Access the digitization profile rules from the Fulfillment Configuration menu (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Digitization Profile Rules**).

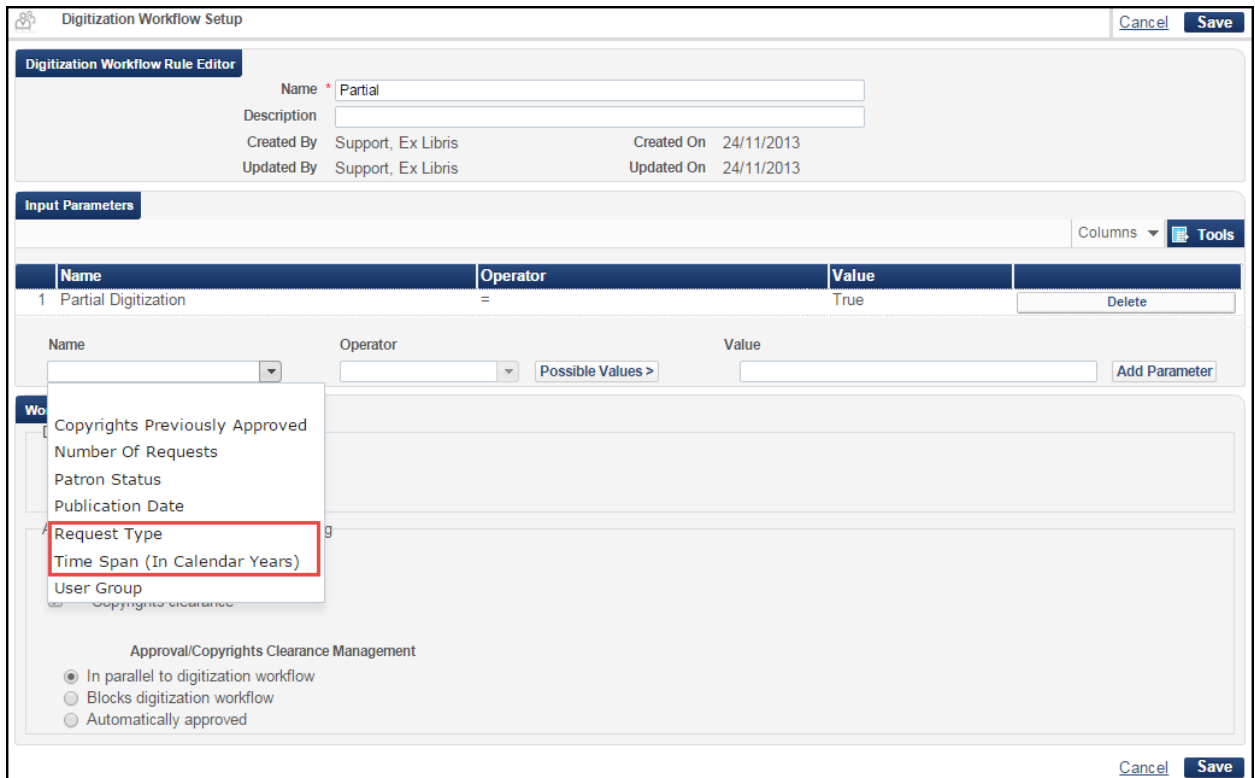


Figure 47 – New Filters in Digitization Profile Rules

Note the following:

- The possible operators for **Time Span (in Calendar Years)** are < or >. The value entered is the number of calendar years since the creation date of the matched copyright record entries. For example, if this parameter is set to <5 then only requests with matching copyright records in the last 5 years will be considered.
- For the Request Type option, there are two new values: **Borrowing resource sharing digitization request** is new. **Lending resource sharing digitization request** replaces **Resource sharing related digitization**. For example, setting this parameter to **Borrowing resource sharing digitization request** makes the rule take effect only for new borrowing resource sharing requests.

Digitization Workflow Setup

Cancel Save

**Digitization Workflow Rule Editor**

Name \*

Description

Created By - Created On 24/09/2015

Updated By - Updated On 24/09/2015

**Input Parameters**

Columns Tools

Name	Operator	Value	
1 Time Span (In Calendar Years)	Less than	5	Delete

Name Operator Value

Request Type = Possible Values >

Borrowing resource sharing digitization request Add Parameter

Borrowing resource sharing digitization request

Course related digitization

Lending resource sharing digitization request

Patron Digitization

Staff digitization

**Workflow Setup**

Digitized Content Management

Deposit

Document delivery

Remote digital storage

Approval/Copyrights Clearance Processing

Approval

Copyrights clearance

Approval/Copyrights Clearance Management

In parallel to digitization workflow

Blocks digitization workflow

Automatically approved

Cancel Save

Figure 48 – New Values in Digitization Profile Rules

- 2 Select an option for the approval and copyrights clearance management. The option that matches the current behavior is **In parallel to digitization workflow**. This means that the digitization workflow is activated without waiting for the approval task to be approved, but does not finish until the approval task is approved. This is also the default option. If **Blocks digitization workflow** is selected, the request workflow is activated only after the approval is completed. If **Automatically approved** is selected, a new approval task is created as **Approved**, and the request workflow is able to continue.

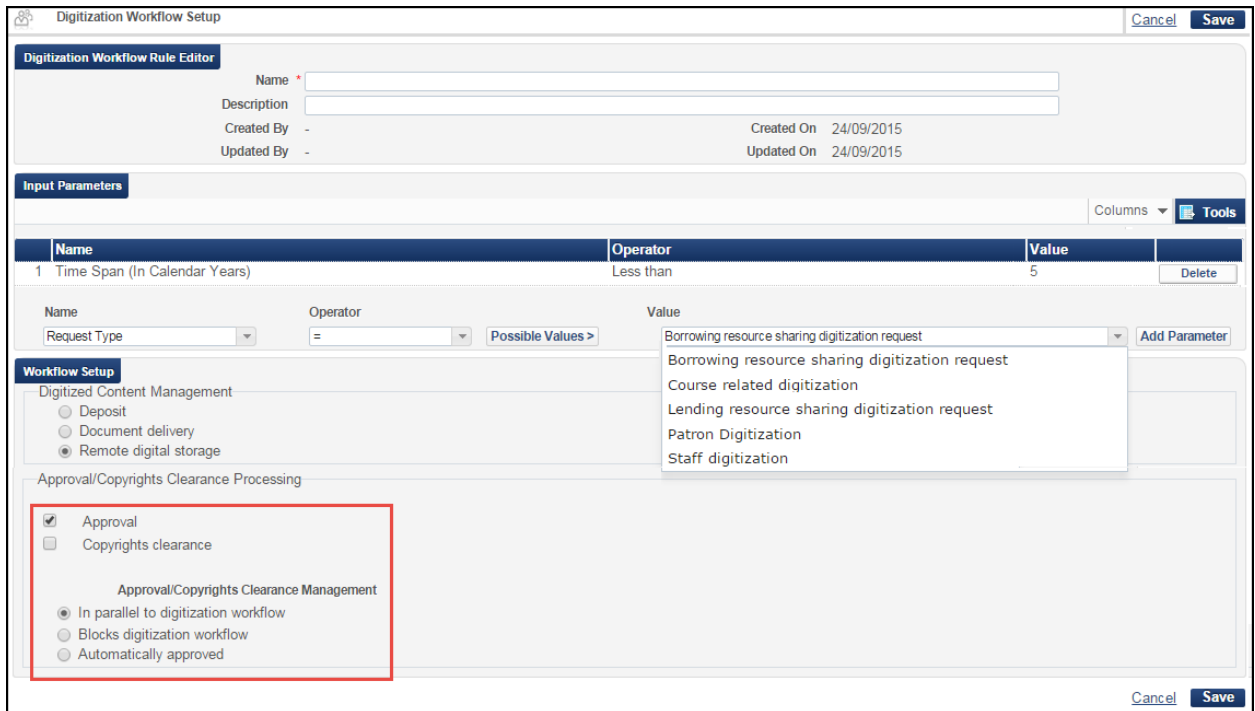


Figure 49 – Approval Processing

## Access Rights Enhancements

### Description

Access rights define the permissions that patrons have to request digital resources. By default, patrons have access to all digital resources. However, you can define rules for access rights that restrict patron access to specific digital resources. For example, for a specific digital resource, you can define rules that disable access in the following scenarios:

- Patrons from a specified user group, such as undergraduate students
- Patrons who access the resource from outside the university computer system, based on IP addresses
- Patrons with specific user IDs

The following enhancements have been made to this feature:

- Access rights are now configurable at the representation level.

- The following changes have been made to the Access Rights List page.
  - The filter has been removed.
  - The **Resource Type** column has been removed.
  - The **Copyrights** column has been removed.
- Clicking **Add Policy** opens the Access Rights Policy page and not a dialog box.

**Notes:**

- Policy names must be unique.
- Access rights policies that are assigned to representations cannot be deleted.

## Step-By-Step Instructions

The following roles can access these features:

- General System Administrator
- Fulfillment Administrator

**To access this feature:**

- 1 Access the Access Rights List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Access Rights**).



Figure 50 – Access Rights List

- 2 Click **Add Access Rights**. The Access Rights Policy page appears.

Figure 51 – Access Rights

- 3 In the **Name** field, enter a name for the access rights policy.
- 4 From the **Copyrights** drop-down list, select a copyrights statement to associate with the new set of access rights. When a patron requests to view an electronic or a digital resource, the specified copyrights are displayed before the patron is able to view the requested resource.
- 5 In the **Description** field, enter a description.
- 6 Click **Save**.

---

**Note:** For information on adding a rule to the access rights policy, see the **Editing Access Rights** section in the *Alma Fulfillment Guide* or the Alma Online Help.

---

## Digital Copyrights

### Description

You can configure a copyrights statement for digital resources. Copyrights statements are used to communicate the terms of use of a resource. This statement can be associated with an access rights policy to be displayed to patrons before they can view a digital resource. The following enhancements have been added to this feature:

- A new **Copyrights** link has been added to the Fulfillment Configuration menu under Digital Fulfillment (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Copyrights.**)
- There are two sample copyrights statements available for you to edit and use.
- A copyrights icon appears in the repository search results that have copyrights configured.
- A copyrights icon appears in the Alma Viewer for items with copyrights configured. Clicking the icon displays the copyright statement.

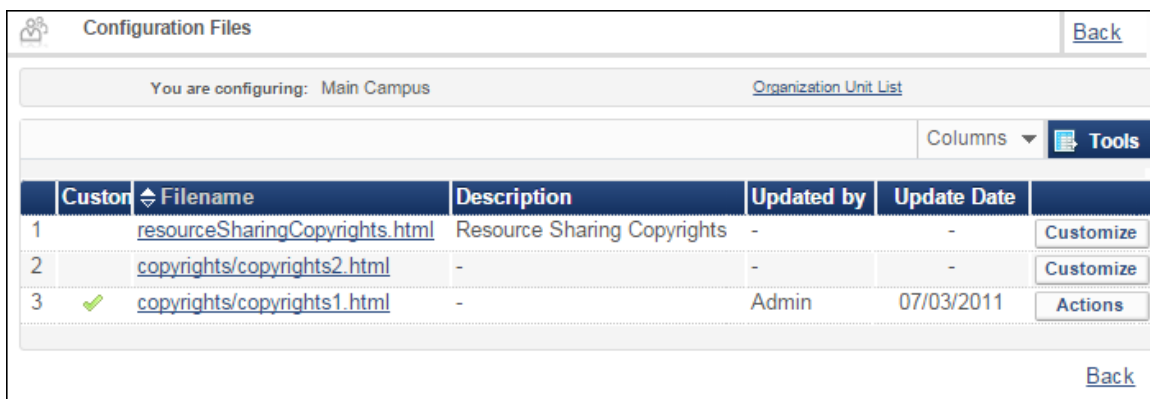
## Step-By-Step Instructions

The following roles can access these features:

- General System Administrator
- Fulfillment Administrator

### To access this feature:

- 1 Access the Configuration Files page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Copyrights**).



The screenshot shows the 'Configuration Files' interface. At the top, it says 'You are configuring: Main Campus' and 'Organization Unit List'. Below this is a table with columns: 'Custom', 'Filename', 'Description', 'Updated by', 'Update Date', and 'Actions'. There are three rows of data. The first row has a 'Customize' button. The second row has a 'Customize' button. The third row has a green checkmark in the 'Custom' column, 'Admin' in the 'Updated by' column, '07/03/2011' in the 'Update Date' column, and an 'Actions' button. A 'Back' link is visible in the top right and bottom right corners.

Custom	Filename	Description	Updated by	Update Date	Actions
	<a href="#">resourceSharingCopyrights.html</a>	Resource Sharing Copyrights	-	-	Customize
	<a href="#">copyrights/copyrights2.html</a>	-	-	-	Customize
✓	<a href="#">copyrights/copyrights1.html</a>	-	Admin	07/03/2011	Actions

Figure 52 – Copyrights

Two sample copyrights statements are available for you to customize.

- 2 Click **Customize** for a copyrights statement. The following, for example, appears.

Configuration File

Cancel Customize

Filename: copyrights/copyrights2.html

File Key: com.exlibris.dps.backoffice.copyrights2

Description:

Updated by: -

Update Date: -

Content:

Law of the United States (Title 17, U.S. Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the photocopy or other reproduction is not to be "used for any purpose other than private study, scholarship, or research." <br><br> If a user makes a request for or later uses a photocopy or reproduction for purposes in excess of "fair use", that user may be liable for copyright infringement. This institution reserves the right to refuse to accept a copying order if, in its judgment, fulfillment of the order would involve violation of the copyright law. <br><br> I have read the above statement and agree to abide by its restrictions.

Cancel Customize

Figure 53 – Copyrights Statement

- 3 Edit the copyrights statement, if you want, and click **Customize**.

After you edit a copyrights statement, the following actions are available:

- Edit – Edit the copyrights statement.
- Restore – Restore the copyrights statement to the default.
- View Default – View the default copyrights statement.

## Other Fulfillment Enhancements

- When configuring the **Borrowing Activity Report** job on the Fulfillment Jobs Configuration page, the options for **Schedule** were expanded, and are now:
  - Not Scheduled

- Every Monday at 06:00
- Every Monday at 20:00
- On the 02 of Every Month at 06:00
- On the 02 of Every Month at 20:00
- You can now search items on the In Process Items page using ISBN/ISSN. The identifier also appears as a column on the page (see Acquisitions for this same enhancement and screenshot).
- The XML for **FulCancelRequestLetter** now includes the element **approval\_entity**, which is the approval information for digital requests.
- The XML for **FineFeePaymentReceiptLetter** now includes the element **notification\_data > user\_fines\_fees\_list > user\_fines\_fees > fine\_owner**, which is the fines and fees owner information.
- The fulfillment parameter **use\_time\_format\_with\_time\_zone\_in\_self\_check** was added to **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**. When **false**, the time zone is not included as part of the due date field in the self-check response message. When **true** (default), the due date is formatted according to the **system\_time\_format** parameter.
- The View It tab now uses the CSS classes **authNote** and **publicNote** to display the authentication and public notes. This enables you to customize each note separately.
- After submitting a request from the Primo Get it tab, the request's place in the queue now appears. A new label, **c.uresolver.request.placeInQueue**, was added to the discovery interface labels for customizing this message.

# Resource Sharing

The following sections describe new or changed Resource Sharing features in this release of Alma.

## Automatic Conversion of Hold Requests to Resource Sharing Requests

### Description

You can now configure Alma to automatically convert unfulfilled hold and patron digitization requests into resource sharing requests. If the request has **Automatically Convert to Resource Sharing** set to **true**, and the request is going to be canceled due to execution of either **Requests – Handle Expiration Step** or **Requests – Recalculate After Inventory Update**, the request is converted.

A cancellation letter with the reason **Converted to Resource Sharing Request** is sent to the patron when a hold request is converted to a resource sharing request. Existing requests are canceled with the cancellation reason **Converted to Resource Sharing Request**.

The status of new requests is **Created borrowing request**.

### Step-by-Step Instructions

The following roles can configure request policies and Terms of Use to allow automatic conversions:

- General System Administrator
- Fulfillment Administrator

## To set policy for converting:

- 1 Open the Terms of Use and Policies table (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**). Click **Add a Terms of Use**. Select **Request** and click **Next**.

The screenshot shows the 'Terms of Use Details' configuration page. At the top, it says 'You are configuring: QA - Provisioning'. Below that, there are fields for 'Name' and 'Description'. A 'Tools' button is visible. The main part of the page is a table of settings:

Is Requestable	Not Requestable (Default value is not requestable)	Actions
Pickup Locations	Anywhere (Default value for Pickup - Anywhere)	Actions
Hold Shelf Period	7 day Hold Shelf (Default value for HoldShelfPeriod)	Actions
Is Digitizeable	Not Digitizable (Not Digitizable)	Actions
Is Requestable for Resource Sharing	Not Requestable For Resource Sharing (Item is not requestable for Resource Sharing)	Actions
Request Priority	Medium (Medium)	Actions
On Shelf Request Policy	Use fulfillment unit definition (Use fulfillment unit definition)	Actions
Personal delivery	Personal Delivery - None (Do not deliver items at all)	Actions
Personal delivery fee	Personal Delivery Fee - No Fee (Personal delivery is not charged with a fee)	Actions
Automatically convert to resource sharing	Do not convert to resource sharing (Do not convert to resource sharing)	Actions

The 'Automatically convert to resource sharing' dropdown is expanded, showing three options:

- Do not convert to resource sharing (Do not convert to resource sharing)
- Convert to resource sharing (Convert to resource sharing)
- Do not convert to resource sharing (Do not convert to resource sharing)

At the bottom right, there are 'Back', 'Cancel', and 'Next' buttons.

Figure 54 – New Policy for Converting Hold Requests

- 2 From the drop down box next to **Automatically convert to resource sharing**, Select **Convert to resource sharing** and click **Next**.
- 3 Confirm the settings for this policy and click **Save**.

---

**Note:** The policy is activated only if the above mentioned jobs are active and determine that a hold request must be canceled due to the expiry of an existing matching physical inventory that can fulfill the request.

---

## Resource Sharing Request Recalls

### Description

Alma now supports a recall feature for resource sharing requests and for both ISO and email partners. The new feature recalls shipped items when a local hold request is placed for that

resource. This includes both borrowing and lending requests. You can configure which loans are recalled first if the requested resource has both copies that were shipped to a remote borrower and copies loaned to local patrons. The parameter that controls this choice, **rs\_prefer\_recall\_method**, defaults to **False**. Changing it to **True** recalls the shipped item first, rather than the locally loaned copy.

Recalls are supported if the relevant workflow profile includes the **Recall item** action. In that case, borrowing requests display a new action, **Recall**.

## Step-by-Step Instructions

The following roles can configure workflow profiles to recall a resource sharing request:

- General System Administrator
- Fulfillment Administrator

The following roles can recall a resource sharing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

### To configure a preference to recall the shipped item if there is one copy on loan and one that has been shipped:

- 1 Access **Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings** and locate the parameter labeled **rs\_prefer\_recall\_method**.

Mapping Table Cancel Save

You are configuring: QA - Provisioning

**Table Information**

Sub System: INFRA      Table Name: Customer Parameters  
Updated By: -      Last Updated: -  
Table Description: Customer Parameters

**Mapping Table Rows** Tools

	parameter key	parameter module	parameter value	free text description	
1	auto_renew_loan_days	fulfillment	2	The days period to auto renew item loans	Customize
2	check_self_ownership_serial	fulfillment	true	Should self ownership be checked for serial	Customize
3	demerit_enable	fulfillment	false	Whether the customer uses demerits	Restore
4	demerit_history_days	fulfillment	0	How many days back loan history is checked	Customize
5	demerit_maximum_threshold	fulfillment	0	Number of demerits after which user will be	Customize
6	demerit_suspension_days	fulfillment	0	Period of days for suspension	Customize
7	distribute_fulfill_changes_last_run	fulfillment		Last run time of the job	Customize
8	email_partner_configurable_line1	fulfillment			Customize
9	email_partner_configurable_line2	fulfillment			Customize
10	enable_request_during_loan_for_different_policy	fulfillment	false	When user has an active loan, enable him to	Customize
11	exclude_lost_and_claimed_returned_loans_from_c	fulfillment	false	Exclude lost and claimed returned loans fr	Customize
12	fulfillment_network_shared_primo	fulfillment	false		Customize
13	generate_resource_sharing_temp_barcode	fulfillment	false		Customize
14	ignore_lender_due_date	fulfillment	false		Customize
15	ill_item_creation_lib_code	fulfillment	RES_SHARE		Customize
16	ill_item_creation_loc_code	fulfillment	OUT_RS_REQ		Customize
17	missing_item_requestable	fulfillment	false	Should missing items be requestable	Customize
18	network_rota_assignment_rules_precedence	fulfillment	false	Network Rota Assignment rules preceden	Customize
19	network_sending_rules_precedence	fulfillment	false	Network sending rules precedence	Customize
20	overdue_at_claim_return_loan	fulfillment	false	Create overdue charges when item is clai	Customize
21	overdue_at_lost_loan	fulfillment	true	Create overdue charges when item is dec	Customize
22	patron_services_timeout_minutes	fulfillment	2	Timeout (in minutes) for the patron servic	Customize
23	prefer_doc_delivery_from_e-resources	fulfillment	true	when both P to D and E to D digitization	Restore
24	prefer_remote_storage	fulfillment	false		Customize
25	primo_loan_list_sorting	fulfillment	descending		Customize
26	remember_last_loan_display	fulfillment	false	Determine if the loan workbench should o	Customize
27	results_best_location_enable	fulfillment	false		Customize
28	return_lost_loan_from_self_check	fulfillment	true	Is returning a lost loan from self-check all	Customize
29	rs_auto_request_lending	fulfillment	false		Customize
30	rs_borrower_copyright_management	fulfillment	true		Restore
31	rs_default_digitization_department	fulfillment			Customize
32	rs_default_pickup_location	fulfillment			Customize
33	rs_disable_lending_auto_assign	fulfillment	false	automatic assignment of lending request	Customize
34	rs_prefer_recall_method	fulfillment	false		Customize
35	rs_support_add_service	fulfillment	true		Customize
36	send_courtesy_notices_and_handle_loan_renewal	fulfillment		Last run time of the job in UTC	Customize

Figure 55 – Recall Parameter

- 2 Click **Customize** and enter **True** in the **parameter value** field.
- 3 Click **Save**.

**To configure the workflow profile to recall a resource sharing request:**

- 1 Modify a borrowing workflow profile (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**).
- 2 Select **Actions > Edit**.
- 3 Find and Ctrl+click the **Recalled by Partner** option.
- 4 Click **Save**.

Workflow Profile	Type	Steps	Actions
1 Auto_WorkflowProfile_Default_Borrowing	Borrowing	Waiting for receive digitally, Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Lender check in, Manual renew, Renew requested, Report damaged item to partner, Request accepted, Waiting for cancel response, Report lost item to partner	Actions
2 Auto_WorkflowProfile_Default_Lending	Lending	Lender check in, Patron renewal, Renewal response, Cancel reply, Staff renewal	Actions
3 Regular Borrowing	Borrowing	Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, <b>Recalled by partner</b> , Lender check in, Manual renew, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted, Waiting for cancel response, Waiting for receive digitally	Actions
4 Regular Lending	Lending	Cancel reply, Lender check in, Patron renewal, Renewal response, Staff renewal	Actions
5 assaf_bor	Borrowing	Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Lender check in, Renew requested, Report damaged item to partner, Request accepted, Waiting for cancel response, Waiting for receive digitally, Report lost item to partner	Actions
6 assaf_lend	Lending	Cancel reply, Lender check in	Actions
7 autoWorkflowProfile_2404131339_Borrowing	Borrowing	Waiting for receive digitally, Cancel request not accepted, Cancelled by staff, Cancelled By Patron, Cancelled by partner, Declared lost by partner, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted	Actions
8 autoWorkflowProfile_2404131339_Lending	Lending	Cancel reply	Actions
9 autoWorkflowProfile_2411131457_Borrowing	Borrowing	Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Lender check in, Renew requested, Report damaged item to partner, Request accepted, Waiting for cancel response, Waiting for receive digitally, Report lost item to partner	Actions
10 autoWorkflowProfile_2411131457_Lending	Lending	Lender check in, Cancel reply	Actions

**Figure 56 – Recall in Workflow**

**To configure the lender side recall policy:**

- 1 Create a Terms of Use (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**).
- 2 Click **Add a Terms of Use**.
- 3 Select **Lending Resource Sharing** and click **Next**.

- 4 In the **Terms of Use Details**, next to **Resource Sharing Recall Period**, select **Actions > Add Policy**.
- 5 Enter a name for the policy, select **Other** in the value type, and enter a number of days.
- 6 Click **Save**.

Terms of Use Details

You are configuring: QA - Provisioning

**Terms of Use Details**

Name \*

Description

Tools

Due Date	Auto Due Date 2 3008150829	Actions
Maximum Renew Date	Maximum Renew Date - None (Does not calculate dates for renewal)	Actions
Resource Sharing Recall Period	Resource Sharing One Week Recall	Actions

Back Cancel Next

**Figure 57 – Recall Policy**

When a request is placed for an item that was shipped, and if the above described policy allows recalling, a recall message is sent to the borrower. The message is sent as an ISO message if the partner is an ISO partner, or as an email if the partner is an email partner.

ExLibris

**Resource Sharing - Recalled item** 06/09/2015

Dear Sir/Madam,

The following item has been recalled. Please return the item by the new due date.

Title	Author	Old Due Date	Due Date
You know who.	Ciardi, John.	05/10/2015	11/09/2015

**Request ID: nr0003**

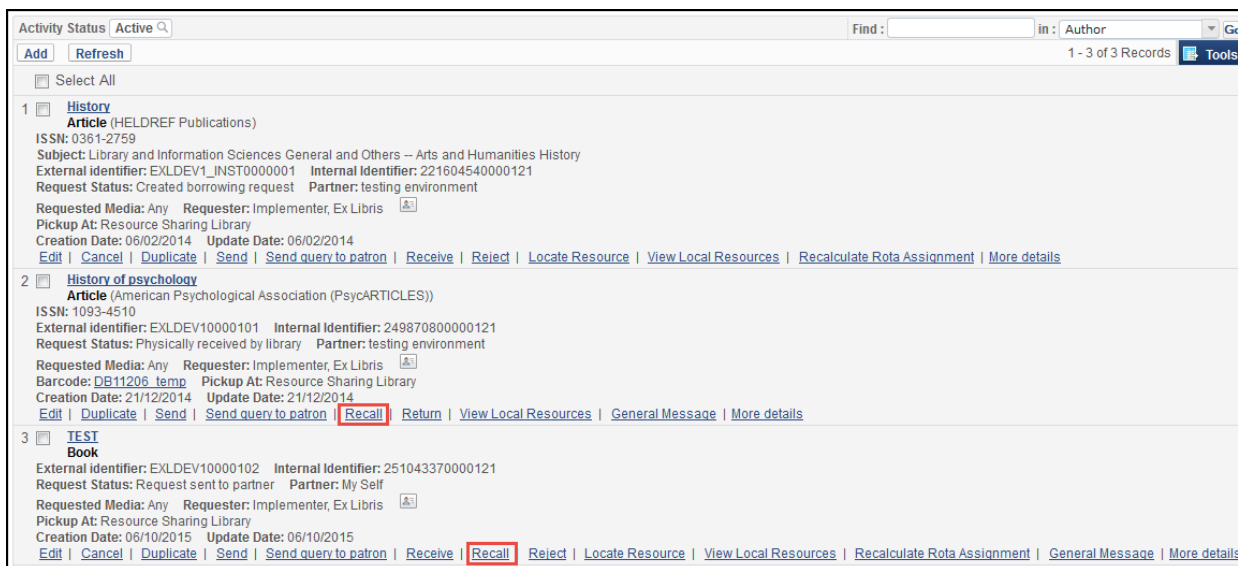
Sincerely  
Resource Sharing Library  
Shimoni  
Jerusalem

**QA - Provisioning**

**Figure 58 – Recall Email**

## To recall a request:

If the partner is an ISO partner, the borrower side status is automatically updated to **Recalled** by the ISO protocol. If not, a manual change is required. Click the **Recall** link for a resource sharing request and enter a new due date.



Activity Status: Active  Find:  in: Author  Go

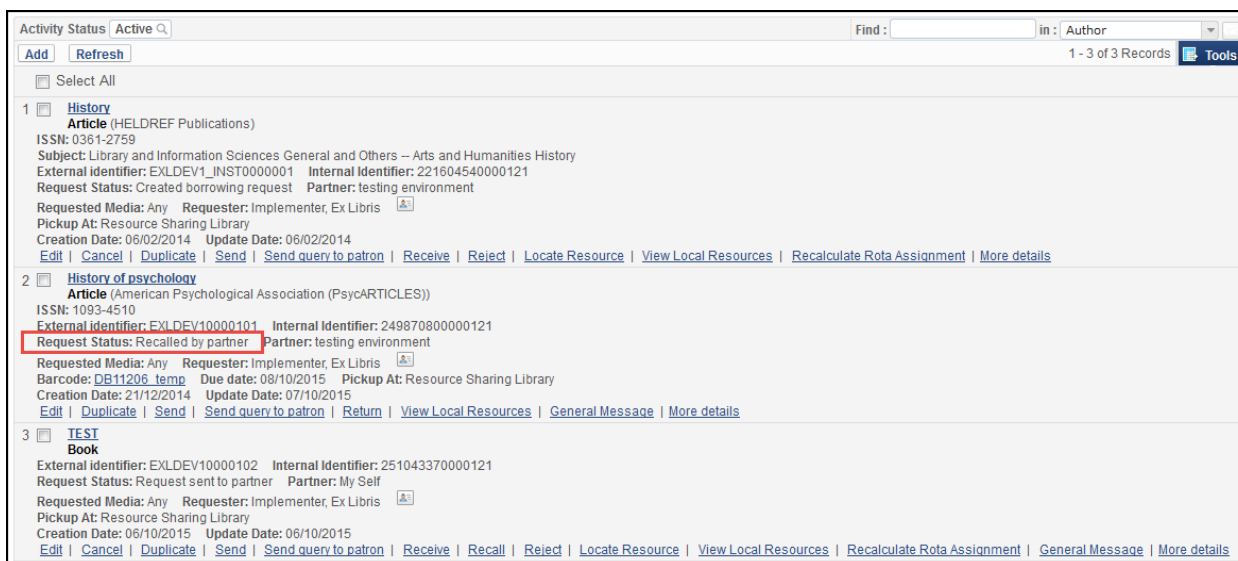
1 - 3 of 3 Records

Select All

- [History](#)  
**Article** (HELDREF Publications)  
ISSN: 0361-2759  
Subject: Library and Information Sciences General and Others -- Arts and Humanities History  
External identifier: EXLDEV1\_INST0000001 Internal Identifier: 221604540000121  
Request Status: Created borrowing request Partner: testing environment  
Requested Media: Any Requester: Implementer, Ex Libris   
Pickup At: Resource Sharing Library  
Creation Date: 06/02/2014 Update Date: 06/02/2014  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Reject](#) | [Locate Resource](#) | [View Local Resources](#) | [Recalculate Rota Assignment](#) | [More details](#)
- [History of psychology](#)  
**Article** (American Psychological Association (PsycARTICLES))  
ISSN: 1093-4510  
External identifier: EXLDEV10000101 Internal Identifier: 249870800000121  
Request Status: Physically received by library Partner: testing environment  
Requested Media: Any Requester: Implementer, Ex Libris   
Barcode: [DB11206\\_temp](#) Pickup At: Resource Sharing Library  
Creation Date: 21/12/2014 Update Date: 21/12/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Recall](#) | [Return](#) | [View Local Resources](#) | [General Message](#) | [More details](#)
- [TEST](#)  
**Book**  
External identifier: EXLDEV10000102 Internal Identifier: 251043370000121  
Request Status: Request sent to partner Partner: My Self  
Requested Media: Any Requester: Implementer, Ex Libris   
Pickup At: Resource Sharing Library  
Creation Date: 06/10/2015 Update Date: 06/10/2015  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Recall](#) | [Reject](#) | [Locate Resource](#) | [View Local Resources](#) | [Recalculate Rota Assignment](#) | [General Message](#) | [More details](#)

Figure 59 – Recall a Request

The status of the request is now set to **Recalled by Partner**.



Activity Status: Active  Find:  in: Author  Go

1 - 3 of 3 Records

Select All

- [History](#)  
**Article** (HELDREF Publications)  
ISSN: 0361-2759  
Subject: Library and Information Sciences General and Others -- Arts and Humanities History  
External identifier: EXLDEV1\_INST0000001 Internal Identifier: 221604540000121  
Request Status: Created borrowing request Partner: testing environment  
Requested Media: Any Requester: Implementer, Ex Libris   
Pickup At: Resource Sharing Library  
Creation Date: 06/02/2014 Update Date: 06/02/2014  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Reject](#) | [Locate Resource](#) | [View Local Resources](#) | [Recalculate Rota Assignment](#) | [More details](#)
- [History of psychology](#)  
**Article** (American Psychological Association (PsycARTICLES))  
ISSN: 1093-4510  
External identifier: [EXLDEV10000101](#) Internal Identifier: 249870800000121  
Request Status: [Recalled by partner](#) Partner: testing environment  
Requested Media: Any Requester: Implementer, Ex Libris   
Barcode: [DB11206\\_temp](#) Due date: 08/10/2015 Pickup At: Resource Sharing Library  
Creation Date: 21/12/2014 Update Date: 07/10/2015  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Return](#) | [View Local Resources](#) | [General Message](#) | [More details](#)
- [TEST](#)  
**Book**  
External identifier: EXLDEV10000102 Internal Identifier: 251043370000121  
Request Status: Request sent to partner Partner: My Self  
Requested Media: Any Requester: Implementer, Ex Libris   
Pickup At: Resource Sharing Library  
Creation Date: 06/10/2015 Update Date: 06/10/2015  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Recall](#) | [Reject](#) | [Locate Resource](#) | [View Local Resources](#) | [Recalculate Rota Assignment](#) | [General Message](#) | [More details](#)

Figure 60 – Recall Status

# Borrower-side Copyright Blocks

## Description

You can now configure copyright approval for resource sharing borrowing requests. If the copyright management rule was applied and the copyright was not approved, a request is not sent. If the copyright management rule was applied and the copyright was approved or there are no copyright restrictions, the request continues processing.

The determination of the copyright status is based on the digitization profile rules that were applied.

A new customer parameter, **rs\_borrower\_copyright\_management**, was added to the Fulfillment Configuration Other Settings to enable this function. The parameter defaults to **False**. The new workflow is triggered when the parameter is set to **True** and a borrowing request is created for an item with digital format.

## Step-by-Step Instructions

The following roles can configure the parameter:

- General System Administrator
- Fulfillment Administrator

The following role can submit or view borrowing requests:

- Fulfillment Services Operator

## To configure a copyright block:

- 1 Access the Customer Parameters mapping table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**).
- 2 Locate the parameter labeled **rs\_borrower\_copyright\_management**.
- 3 Click **Customize** and type **True** in the **parameter value** field.

Mapping Table

You are configuring: QA - Provisioning

**Table Information**

Sub System: INFRA      Table Name: Customer Parameters  
 Updated By: -      Last Updated: -  
 Table Description: Customer Parameters

**Mapping Table Rows**

	parameter key	parameter module	parameter value	free text description	
1	auto_renew_loan_days	fulfillment	2	The days period to auto renew item_loans	Customize
2	check_self_ownership_serial	fulfillment	true	Should self ownership be checked for ser	Customize
3	demerit_enable	fulfillment	false	Whether the customer uses demerits	Restore
4	demerit_history_days	fulfillment	0	How many days back loan history is chec	Customize
5	demerit_maximum_threshold	fulfillment	0	Number of demerits after which user will g	Customize
6	demerit_suspension_days	fulfillment	0	Period of days for suspension	Customize
7	distribute_fulfill_changes_last_run	fulfillment		Last run time of the job	Customize
8	email_partner_configurable_line1	fulfillment			Customize
9	email_partner_configurable_line2	fulfillment			Customize
10	enable_request_during_loan_for_different_policy	fulfillment	false	When user has an active loan, enable him	Customize
11	exclude_lost_and_claimed_returned_loans_from_c	fulfillment	false	Exclude lost and claimed returned loans f	Customize
12	fulfillment_network_shared_primo	fulfillment	false		Customize
13	generate_resource_sharing_temp_barcode	fulfillment	false		Customize
14	ignore_lender_due_date	fulfillment	false		Customize
15	ill_item_creation_lib_code	fulfillment	RES SHARE		Customize
16	ill_item_creation_loc_code	fulfillment	OUT_RS_REQ		Customize
17	missing_item_requestable	fulfillment	false	Should missing items be requestable	Customize
18	network_rota_assignment_rules_precedence	fulfillment	false	Network Rota Assignment rules preceden	Customize
19	network_sending_rules_precedence	fulfillment	false	Network sending rules precedence	Customize
20	overdue_at_claim_return_loan	fulfillment	false	Create overdue charges when item is clai	Customize
21	overdue_at_lost_loan	fulfillment	true	Create overdue charges when item is dec	Customize
22	patron_services_timeout_minutes	fulfillment	2	Timeout (in minutes) for the patron servic	Customize
23	prefer_doc_delivery_from_e-resources	fulfillment	true	when both P to D and E to D digitization	Restore
24	prefer_remote_storage	fulfillment	false		Customize
25	primo_loan_list_sorting	fulfillment	descending		Customize
26	remember_last_loan_display	fulfillment	false	Determine if the loan workbench should o	Customize
27	results_best_location_enable	fulfillment	false		Customize
28	return_lost_loan_from_self_check	fulfillment	true	Is returning a lost loan from self-check all	Customize
29	rs_auto_request_lending	fulfillment	false		Customize
30	rs_borrower_copyright_management	fulfillment	true		Restore
31	rs_default_digitization_department	fulfillment			Customize

Figure 61 – Borrower Copyright Blocks

4 Click **Save**.

### To invoke copyright management blocks:

- 1 Create a borrowing request with **Digital** selected as the **Requested Format**. **Copyrights Status** appears and is a required field. Select a copyright status or click **Calculate Copyrights Status** to the right of the drop-down list.

Clicking **Calculate Copyrights Status** automatically activates the Digitization Profile Rules (configured in the Digital Fulfillment section of the Fulfillment Configuration) and applies the calculated value to the request. The calculated value is overridden from this page.

Note that the same Digitization Profile Rules are also automatically applied when a digitally requested request is placed by Primo. In either case, if the rules determine that manual copyright approval is required, then the request cannot be sent to the lender.

The screenshot shows the 'Request Attribute' form. The 'Requested Format' dropdown is set to 'Digital' and is highlighted with a red box. Below it, the 'Copyrights Status' dropdown is empty and also highlighted with a red box. To the right of the 'Copyrights Status' dropdown is a button labeled 'Calculate Copyrights Status'. Other fields include 'Requester' (Implementer, Ex Libris - Staff - exl\_impl), 'Owner' (Resource Sharing Library), 'Request Status' (Created borrowing request), 'Requested Media' (Any), 'Delivery Location' (Deliver to library), 'Requested Pickup Location', 'Shipping Cost' (USD), 'Willing to Pay', 'Agree to Copyright terms', 'Needs patron information', and 'Request Note'. At the bottom, there are buttons for 'Add Partners', 'Add Rotas', 'Cancel', 'Activate Notes', 'Go', 'Save and Edit', 'Locate', and 'Save'.

Figure 62 - Invoke Copyright Management Blocks

The option to send the request only appears once the status of the request is set to **Copyright Approved**.

**Request Attribute**

Specific Edition Only

Requester \* Implementer, Ex Libris - Staff - exl\_impl  
exl\_impl

Owner \* Resource Sharing Library

Partner Auto\_Partner\_Default\_ISO

Request Status Created borrowing request

External identifier

Requested Format Digital

Requested Media Any

Allow Other Format

Preferred Send Method

Date Needed By

Delivery Location  Deliver to library  Alternative address

Requested Pickup Location \*

For Reading-Room Use Only

Copyrights Status \* Copyright approved Calculate Copyrights Status

Shipping Cost

Willing to Pay Copyright approved

Agree to Copyright terms Copyright not approved

Needs patron information No copyrights restriction

Request Note

Maximum Fee

Add Partners Add Rotas

Cancel Activate Notes Go Save and Edit Locate **Send** Save

Figure 63 – Request Once Copyright Is Approved

## Enhanced Search Options in Resource Sharing Task Lists

### Description

A number of new search criteria have been added to the find bar for borrowing and lending request lists. The new options in the borrowing request list are:

- Author
- DOI
- Journal Title
- LCCN
- OCLC Number

- PMID

The lending request list contains the same new criteria with also an option for **Item Barcode**.

## Step-by-Step Instructions

The following roles can perform a search on the resource sharing task lists:

- Fulfillment Services Operator
- Fulfillment Services Manager

### To perform a search:

- 1 Access the Borrowing or Lending Task List (**Fulfillment > Resource Sharing > Lending Requests** or **Fulfillment > Resource Sharing > Borrowing Requests**). Click the arrow on the drop-down list next to the **Find in** box.

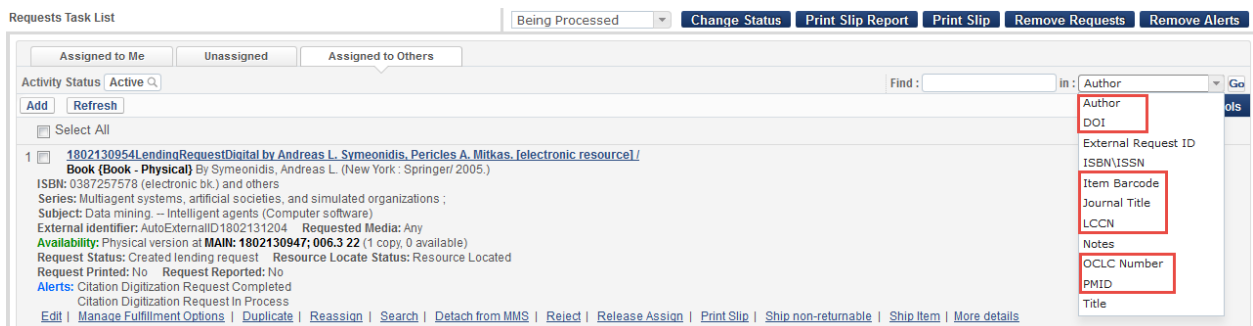


Figure 64 – Search Function

## Other Resource Sharing Enhancements

- In both the Pick Up Requested Resources task list and the Resource Sharing Lending Requests task list, the values for **Type** and **Format type** fields in the Print Slip report pop-up are now pre-filled with the last values selected by the user.
- The new query types code table was expanded to support up to 30 types of queries. See **Configuring Patron Queries** in the *Alma Fulfillment Guide* or the Alma Online Help for information about patron queries. The non XSL based option to send patron queries will become obsolete by the middle of next year.

- Two new tasks are available in the Tasks list (available from the persistent Tasks link or in the Tasks widget):
  - Lending Requests Failed Locate – Assigned to You** – Lending requests assigned to you for which the item could not be located
  - Lending Requests Failed Locate – Unassigned** – The same, for unassigned requests.
- The creation and update date were added to the pages on which you can view or edit a resource sharing request.

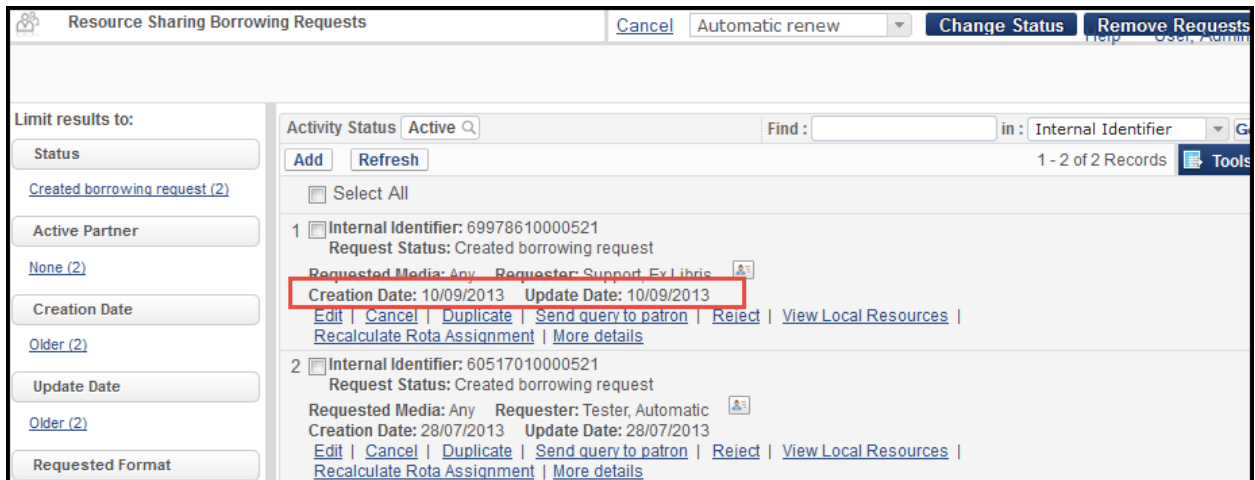


Figure 65: Resource3 Sharing Borrowing Requests Page

- The option **All** was added to the **Activity Status** filter when viewing a list of resource sharing requests. If **All** is selected, all requests matching the text in the **Find** field appear in the list. If **All** is selected but no text is entered in the **Find** field, the list remains empty.
- Vendor tests with SBN have been successful. A peer to peer workflow has been tested with the SBN system using Alma’s ISO integration.

For detailed information on peer to peer based resource sharing between Alma and various systems, see [https://developers.exlibrisgroup.com/alma/integrations/resource\\_sharing/p2p](https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/p2p).

# Administration

The following enhancements have been made to the HealthCheck Tool:

- A new HealthCheck Tool test has been added to the Resource Management area:

Able to import new records?

The test performs the following checks:

- FTP is configured for import profiles and operates properly
- Import profiles from job history successfully ran in the last month
- The user is assigned the following roles:
  - ADMINISTRATION
  - REPOSIT\_ADMIN
  - CATALOGING\_CONFIGURATION
- The titles of the HealthCheck Tool tests were changed for greater clarity.

## **Fulfillment**

- Physical locations have fulfillment units
- Fulfillment units have no request policy conflicts
- Libraries have standard opening hours
- Physical locations are associated with circulation desks
- Library relationships are mutual
- Self-Check circulation desks have an SC profile
- Libraries have a primary circulation desk
- Circulation desks have a request/circulation operator
- Item policies are configured in the Item Policy code table

## **Acquisitions**

- Vendor EDI profiles have valid FTP connection details
- Reporting codes for funds and invoices/orders match
- Active vendors have addresses and email addresses

- PO line currencies are configured
- PO Line – New orders have been created in the last month (EOD or manually)
- Sufficient permissions to create an invoice (manually and/or batch)
- History of the exporting an invoice for payment job found
- ACQ work order department definitions exist and operator roles are assigned.
- Global e-resources are activated
- An active fiscal period and active funds for active fiscal period exist

#### **User Management**

- User Groups that are configured
- The list of user groups has patron limits
- Users have patron roles
- User block definitions defined properly
- Staff users are defined and users have been updated manually in the last month
- The SIS FTP connection is working and users have been updated manually in last month

For a description of these tests, see the *Alma Administration Guide* or the Alma Online Help.

# Collaborative Networks and Multicampus Institutions

The following sections describe new or changed collaborative network and multicampus features in this release of Alma.

## Improved Visualization of Shared Electronic Resources

When member institutions do an **All titles** search in the Community Zone Alma now identifies Community Zone resources that are available to them via the Network Zone.

When searching the Community tab, Alma places a Network icon next to the Community Zone resource indicating that it is available to the member institution from its Network Zone (see below).

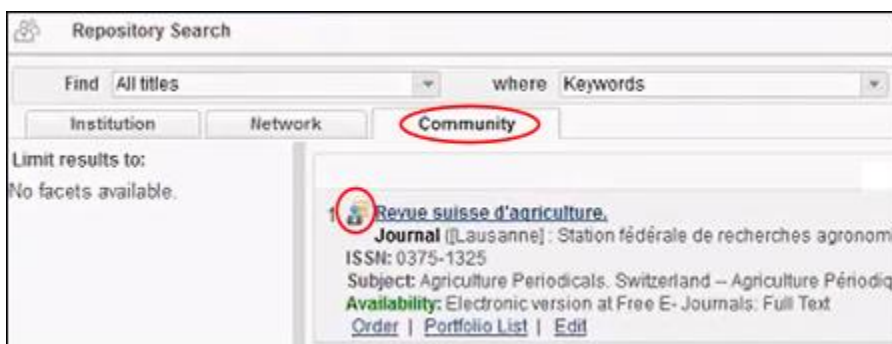


Figure 66 - Community Zone Resource Identified as Available in the Network Zone from the Community Tab

Also, when searching from the Community tab, if a resource is available to the member in both the Institution Zone and the Network Zone, the Institution icon appears next to the resource on the Community tab (the local resource always takes precedence).

When doing an **Electronic Portfolio** or **Electronic Collection** search from the Community tab, if you don't have the resource at the Institution Zone and you do have it at the Network Zone, you see the Network icon next to the electronic portfolio or the electronic collection resource with the following exceptions:

- If the resource is identified as **Available For** your institution, the Institution icon appears next to the resource in the Community tab.

- If the resource is identified in an **Available For Group** that contains your institution, the Institution icon appears next to the resource in the Community tab.

## Enhanced Support for Network Institution Search Results with SRU

### Description

Alma now retrieves holdings availability for each member of the network when the network institution uses the SRU protocol to complete a search. This capability is implemented with the new **Enrich with Members Availability** parameter in the external system integration profile for the SRU server.

Alma supports MARCXML for the SRU format. The holdings availability indication is handled using the following MARCXML format:

- MARC 852 field
- \$a Location – Institution code
- \$6 Linkage – MMS ID
- \$9 Local field – P (print) / E (electronic) / D (digital)

When more than one material type is available for one institution such as print and electronic, the 852 field contains multiple \$9 entries.

### Step-by-Step Instructions

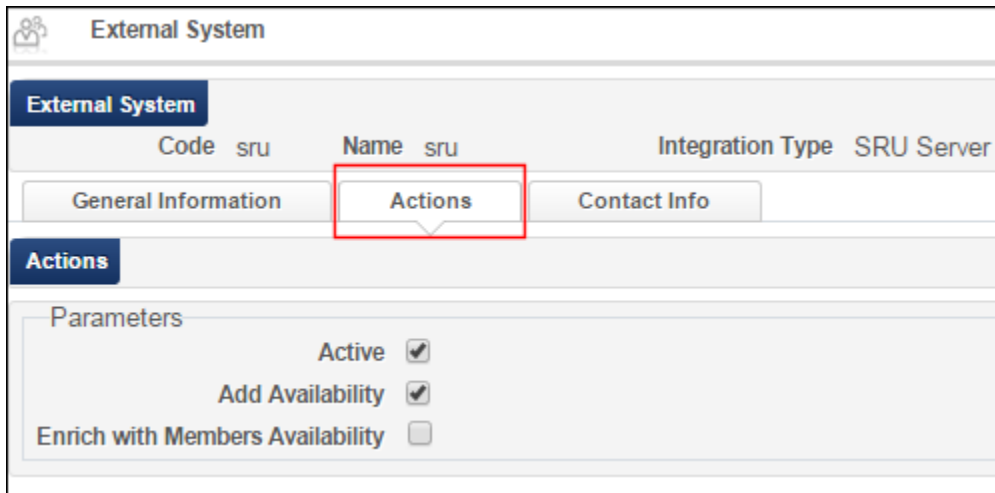
The following role can configure the SRU external system integration profile:

- General System Administrator

#### To configure the SRU integration profile for retrieving member holdings availability:

- 1 Click **Integration Profiles** from the General Configuration page (**Administration > General Configuration > Configuration Menu > External Systems section**). The Integration Profile List page appears.
- 2 Select **Actions > Edit** for the SRU profile located in the profile list. The profile configuration opens to the **General Information** tab.

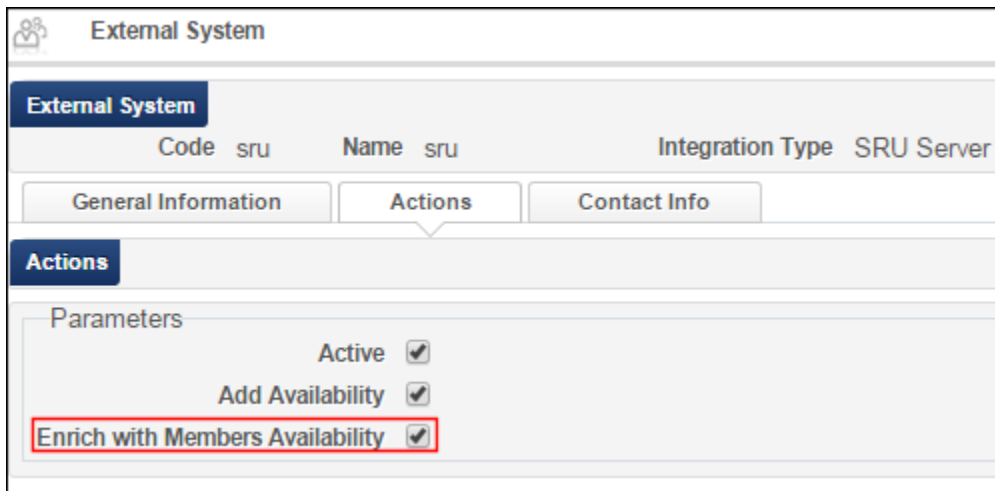
3 Select the **Actions** tab.



The screenshot shows a web interface for an 'External System'. At the top, there is a header with a logo and the text 'External System'. Below this is a navigation bar with three tabs: 'General Information', 'Actions', and 'Contact Info'. The 'Actions' tab is highlighted with a red box. Below the navigation bar, there is a section titled 'Parameters' with three checkboxes: 'Active' (checked), 'Add Availability' (checked), and 'Enrich with Members Availability' (unchecked).

Figure 67 - SRU Integration Profile Actions Tab

4 Select the **Enrich with Members Availability** check box.



The screenshot shows the same web interface as Figure 67, but with the 'Enrich with Members Availability' checkbox selected. The 'Enrich with Members Availability' checkbox is now checked and highlighted with a red box.

Figure 68 - SRU Integration Profile Actions Tab with Enrich with Members Availability Selected

5 Click Save.

# Enhanced Patron Search in Fulfillment Network

## Description

Registering a linked patron for a walk in service is now available based on patron attributes, such as name and email, in addition to patron identifier. This enables walk-in services in a fulfillment network for patrons that don't happen to have an ID available. See **Linking Users in Collaborative Networks** in the *Alma Administration Guide* or the Alma Online Help for information about patron queries.

A new customer parameter **Fulfillment\_network\_search\_by\_all** was added to the user management module to enable this. All existing institutions have this value set to **False**, as that is the default for this parameter. The new parameter must be enabled at the institution where the patron is already registered in order for this feature to work.

## Step-by-Step Instructions

The following roles can configure the search:

- User Administrator
- General System Administrator

The following roles can perform a user search in Find and Manage Services:

- User Manager
- User Administrator

The following roles can perform a user search in Manage Patron Services:

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

### To configure a search:

- 1 Open the Customer Parameters mapping table (**Administration > User Management Configuration > Configuration Menu > General > Other Settings**) and locate the parameter labeled **Fulfillment\_network\_search\_by\_all**.
- 2 Click **Customize** and enter `True` in the parameter value field.

Mapping Table Cancel Save

You are configuring: QA - Provisioning

**Table Information**

Sub System: INFRA Table Name: Customer Parameters  
 Updated By: - Last Updated: -  
 Table Description: Customer Parameters

← Mapping Table Rows Tools

	parameter key	parameter module	parameter value	free text description	
1	address_line1_regex	user_management			Customize
2	address_line2_regex	user_management			Customize
3	address_line3_regex	user_management			Customize
4	address_line4_regex	user_management			Customize
5	address_line5_regex	user_management			Customize
6	days_password_change	user_management	90	Number of days from last password chan	Customize
7	email_regex	user_management	^*(([0-9a-zA-Z]([-.w]*[0-9a-zA-Z])*)@([0-9a-	must have a valid form	Customize
8	email_regex_display	user_management	must have a valid form		Customize
9	email_updating_new_user	user_management	true		Customize
10	from_address	user_management		specifies the 'from address' when sendin	Customize
11	fulfillment_network_search_by_all	user_management	true		Restore
12	password_regex	user_management	^(?=.*d)(?=.*[a-z])(?=.*[A-Z]).{8,}\$	must be at least 8 characters, and must in	Customize
13	password_regex_display	user_management	must be at least 8 characters, and must in		Customize
14	phone_regex	user_management	(((\s)*?d(\s)*?)*(\d))?(s)*	must be numeric	Customize
15	phone_regex_display	user_management	must be numeric		Customize
16	photo_identifier_type	user_management	BARCODE		Restore
17	photo_server_url	user_management			Restore
18	photo_suffix	user_management			Customize
19	pin_number_method	user_management	fourDigit	method for generating a pin number (from	Restore
20	postal_code_regex	user_management	[A-Z0-9-]{0,16}	must be between 0 to 16 characters, and	Customize
21	postal_code_regex_display	user_management	must be between 0 to 16 characters, and		Customize
22	preferred_identifier	user_management			Customize
23	primary_identifier_regex	user_management			Customize
24	url_regex	user_management	^http[s]?://[a-zA-Z0-9-]+\.[a-zA-Z]{2,3}/	must have a leading protocol, a good loc	Customize
25	use_pincode_for_selfcheck_machine	user_management	false	Indicates if pincode is used for selfcheck	Customize

Tools Cancel Save

Figure 69 – New Search Parameter

3 Click Save.

**To perform a search:**

- 1 Search for a user from either **Fulfillment > Checkout/Checkin > Manage Patron Services** or while adding a user in **Administration > User Management > Find and Manage Users**.
- 2 In either of these locations, select **Find User in Other Institution** and select an institution name.

**Patron Identification**

**Enter patron's ID**

Find user in other institution

Institution

Scan patron's ID or search for patron \*  **Find User**

Use proxy

**Go to Return Items** **Register New User**

**Figure 70 – Search from Manage Patron Services**

**Quick User Management** Cancel **Save and continue** **Save**

**Not local**

Find user in other institution

Institution  Scan patron's ID or search for patron  **Find User**

**User Details**

User Information

First name \*  Middle name

Last name \*  Primary identifier \*

Title

PIN number  **Generate**

Job category  Job description

Gender  User group

Campus  Preferred language

Birth date  Expiration date

Purge date

Resource sharing library

User Management Information

Type \*  Internal - Refers to a user type whereby the user information is managed wholly within Alma.  
 Internal with external authentication - The same as internal with the exception that the authentication is managed externally.

Password \*

Verify password \*

Force password change on next login

Email Addresses

Email types \*  Alternative  Personal  School  Work

Email address

Addresses

Address types \*  Alternative  Home  School  Work

Street address

City

State/Province  Postal code

Country

Phone Numbers

Phone types  Home  Mobile  Office  Office fax

Phone number

Cancel **Save and continue** **Save**

**Figure 71 – Search from Find and Manage Users**

- 3 Enter patron search criteria. Valid search criteria include first name, last name, or email address. The search must be an exact match. If the search yields more than one result, an error is returned. If the search is successful, the available fields are populated.

The screenshot displays the 'Quick User Management' interface. At the top, there are 'Cancel' and 'Update User' buttons. Below this is a 'Not local' section with a 'Find user in other institution' checkbox checked. The 'Institution' dropdown is set to 'University of Washington', and the 'Scan patron's ID or search for patron' field contains 'Aaf'. A 'Find User' button is located to the right.

The 'User Details' section is expanded, showing 'User Information'. Fields include:
 

- First name: Ahmad
- Last name: Aaf
- Middle name: Javid
- Primary identifier: 1004985335060001842
- Job category: Please select a value
- Job description: (empty)
- User group: Default
- Preferred language: English
- Expiration date: 01/11/2016
- Purge date: 01/18/2016
- Resource sharing library: (empty)

Below 'User Information' are sections for 'Email Addresses', 'Addresses', and 'Phone Numbers'.
 

- Email Addresses:** Email types: Alternative (unchecked), Personal (unchecked), School (checked), Work (unchecked). Email address: nosuchmail@no.such.mail.com
- Addresses:** Address types: Alternative (unchecked), Home (unchecked), School (checked), Work (unchecked). Street address: 16943 MAPLEWILD AVE, BURRIEN, WA. State/Province: 98166. Country: (empty). City: (empty). Postal code: (empty).
- Phone Numbers:** Phone types: Home (unchecked), Mobile (unchecked), Office (checked), Office fax (unchecked). Phone number: 206-953-9030

At the bottom right of the form, there are 'Cancel' and 'Update User' buttons.

Figure 72 – Patron Information Copied from Network Institution

## Other Collaborative Network Enhancements

- The match mechanism for the Network Zone was enhanced for import processing. Previously, when a member import (see the Match Profile tab settings below) found a match in the Network Zone and the bibliographic record in the Network Zone was linked to the Community Zone, the Network Zone record attached to the Community Zone was skipped and was not presented to the member in the Institution Zone.

Now import processing presents the Community Zone linked record in the Institution Zone (identified in the member's Repository Search results with the Community Zone icon on the Institution tab), enabling the member to create inventory/PO lines. If you prefer the older method for handling matches, contact Ex Libris Support to disable the parameter for this new capability.

This feature also assumes that the customer parameter (`ignore_cz_records`) in the mapping table for ignore Community Zone records is set to **false**.

🏠 **Import Profile Details**

Profile Type
Repository

Profile Details
Normalization & Validation
Match Profile
Set Management Tags

Match Profile

Serial match method Unique OCLC Identifier Match Method

Non Serial match method Unique OCLC Identifier Match Method

Match Actions

Handling method  Automatic  Manual

Upon match  Merge  Overlay  Do Not Import  Use NZ Record

Merge/Overlay

Merge method Overlay all fields but local

Allow bibliographic record deletion

Do not override/merge a non-brief record with a brief version

Unlink bibliographic records from community zone

Do not override/ merge record with an older version  Disabled  Consider Originating System  Ignore Originating System

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  Add To NZ  Do Not Import  Import To IZ

Figure 73 - Import Profile Match Profile Tab for Member Import

# Analytics

The following sections describe new or changed Analytics features in this release of Alma.

## User Title Field Added to User Details Dimension

The User Title field was added to the shared User Details dimension (for example, **Users > User Details**). The field contains the title of the user, such as Mr., Dr., and so forth.

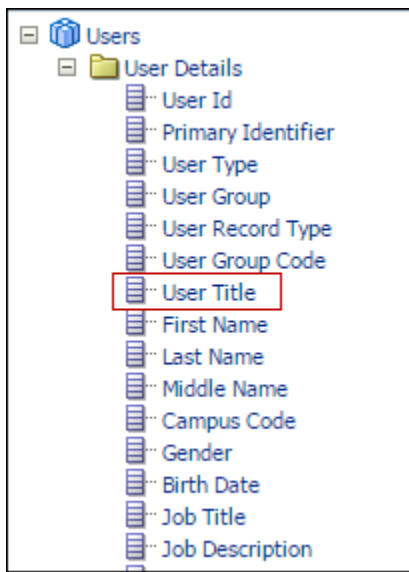


Figure 74 –User Title

# Alma APIs

For this release, the following API was **added**:

- A Lending Requests API, which retrieves full information about lending requests. For details, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.

The following APIs were **changed**:

- GET /bibs can now fetch multiple of bibliographic records using mms\_id. For example, GET /bibs?mms\_id~1234,5678  
Expand parameters, such as p\_avail, are also supported.
- Corrections were added to the Linked Data API. For details, see [https://developers.exlibrisgroup.com/alma/integrations/linked\\_data](https://developers.exlibrisgroup.com/alma/integrations/linked_data).
- The Loans API now returns the **loan\_fine** value (the amount of fines for this loan).
- The Create PO Line API can now generate a barcode and add an expected delivery date. For details, see <https://developers.exlibrisgroup.com/alma/apis/acq>.
- APIs that retrieve lists of objects and allow setting a limit to the number of retrieved records can now be defined with a limit of 0, which retrieves the total number of records in the list, without retrieving the list itself.
- The Retrieve Representation API was enhanced. For details, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.

# Alma Interface Updates

The following sections describe new or changed interface features in this release of Alma.

## Importing Tables

### Description

The **Import** button that appears on many code tables is now functional. For tables that can be edited, click **Import** to upload the table from an Excel file. The file format must match exactly the Excel file that you receive when you export the table using **Tools > Excel**, except that the sheet must be named **CodeTable**. It is recommended that you export the file, make your changes, and then import the changes, as described below.

### Step-by-Step Instructions

Any role that is able to configure the code table can import table information.

#### To import table information:

- 1 Export the file using **Tools > Excel**.
- 2 Open the Excel file and rename the Excel sheet **CodeTable**.
- 3 Make your changes and save the file.
- 4 Click **Import** on the relevant page. The Import Tables page appears.
- 5 Click **Browse** to locate your file.
- 6 Click **Import** to upload the file. The contents of the file appear on the page.
- 7 Review your changes and click **Import** to import the changes to Alma.

## Other Interface Enhancements

- Autocomplete was added to additional drop-down lists in Alma. Select the list and then type in a few letters of the option you are searching for to limit the items in the list to those

that contain the letters you typed. This change includes all list pages with filter drop-down lists, pages with **Find** category lists, and the **Sort By** list on the repository search page.



Figure 75 - Autocomplete Example

- Exporting code or mapping tables that have an **Enabled** column, such as **User Statistical Categories** or **FTP Include List** (and not list pages that have enabled columns, such as **Role Assignment Rules** and **Linked Account Rules**), now include the **Enabled** column in the exported Excel file. The values for this column are **Yes** or **No**.

Note that code and mapping tables have the page name **Code Table** or **Mapping Table** and a **Table Information** section at the top, for example:

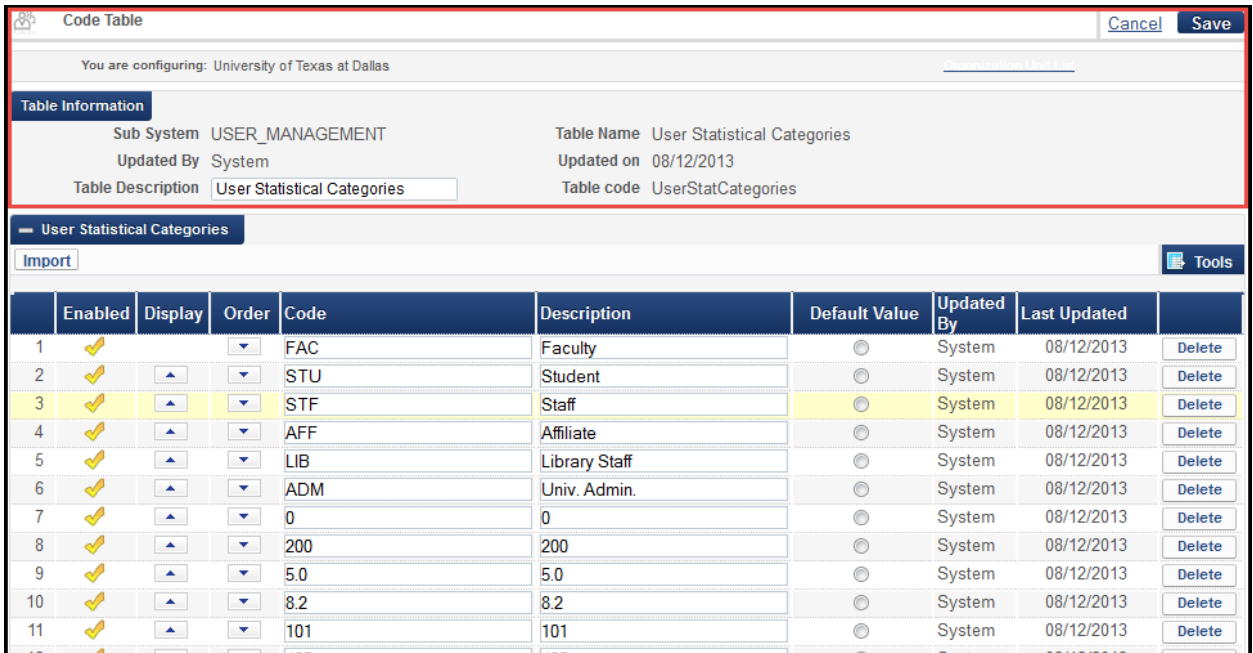


Figure 76 - User Statistical Categories Code Table

Mapping Table Cancel Save

You are configuring: Main Campus [Organization Unit List](#)

**Table Information**

Sub System: USER\_MANAGEMENT      Table Name: DisplayUserName  
 Updated By: -      Last Updated: -  
 Table Description:

**Mapping Table Rows** Tools

Enabled	Record Type	First Displayed Name	Second Displayed Name	Third Displayed Name	Separator	Updated By	Last Updated	
✓	ALL	lastName	firstName		,	-	-	<a href="#">Customize</a>
✓	CONTACT	lastName	firstName		,	-	-	<a href="#">Customize</a>
✓	ORGANIZATION	firstName				-	-	<a href="#">Customize</a>
✓	PUBLIC	lastName	firstName		,	-	-	<a href="#">Customize</a>
✓	STAFF	lastName	firstName		,	-	-	<a href="#">Customize</a>
✓	USER	lastName	firstName		,	-	-	<a href="#">Customize</a>

Figure 77 - Display User Name Mapping Table

## Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count appears for requests only when it is greater than 0 (zero). The count should also appear as 0 (zero) requests when they occur.
- Fixed position fields cannot be modified using the extension loader (extension packs) at this time.
- MARC extensions cannot currently be loaded into authority profiles.
- Regarding the autocomplete/pop-up assistance being provided for several UNIMARC fields in the MD Editor, there is a known issue related to UNIMARC 327 \$a and 327 \$b. These subfields are based on the same functionality and as a result, the pop-up suggestions in the MD Editor suggests both subfields' values when entering content in either the 327 \$a or the 327 \$b.
- When doing an external search using Z39.50 and SRU and retrieving 10,000 or more records, Alma responds with an error message when it retrieves the next bulk of records exceeding the 10,000 limit. Z39.50 integration is intended for integrating Alma search with other automated systems for the purposes of interlibrary loan, copy cataloging, or selection. Using Z39.50 integration for other workflows, such as performing bulk exports of records, is not supported.

## Fixed Issues

The following previously known issues have been fixed:

- The **Import** button in various code tables in Alma is currently not functional.
- When a member runs an import profile with the option of **Use Network Zone** and chooses to use the new functionality of **Do not override/ merge record with an older version**, the import will not create purchase order lines or inventory.

# Data Services

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

## New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period of 11-October-2015 through 25-October-2015:

- EBSCOhost Philosopher's Index with Full Text
- EDUSERV Bentham Science Chemistry Collection 2015-2017
- EDUSERV Bentham Science CMedical PubMed Collection 2015-2017
- EDUSERV Bentham Science Complete Collection 2015-2017
- EDUSERV Bentham Science Drug Design and Discovery Collection 2015-2017
- EDUSERV Bentham Science High Impact Collection 2015-2017
- EDUSERV Bentham Science Patents Collection 2015-2017
- EDUSERV Bentham Science Pharmacy Collection 2015-2017
- IngentaConnect National Institute for Career Education and Counselling
- JISC Collections Annual Reviews Biomedical Life Sciences 2015-2017 Post 2008
- JISC Collections Annual Reviews Biomedical Life Sciences 2015-2017 Pre 2008
- JISC Collections Annual Reviews Economics 2015-2017 Post 2008
- JISC Collections Annual Reviews Economics 2015-2017 Pre 2008
- JISC Collections Annual Reviews Physical Sciences 2015-2017 Post 2008
- JISC Collections Annual Reviews Physical Sciences 2015-2017 Pre 2008
- JISC Collections Annual Reviews Sciences 2015-2017 Post 2008
- JISC Collections Annual Reviews Sciences 2015-2017 Pre 2008

- JISC Collections Annual Reviews Social Sciences 2015-2017 Post 2008
- JISC Collections Annual Reviews Social Sciences 2015-2017 Pre 2008
- NSTL 购买电子全文期刊

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**Note:** No new external resources were added for this release.

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