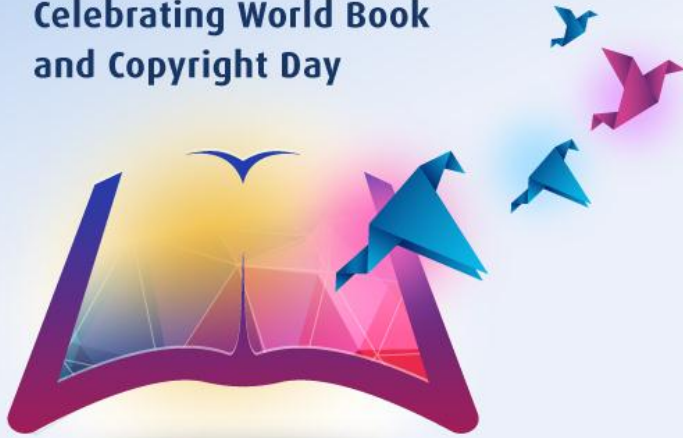


Alma April 2014 release:  
**Celebrating World Book  
and Copyright Day**



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# About the Alma Release Notes

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

These release notes include:

- [Alma April 2014 Release Highlights](#)
- [Data Services](#)
- [Alma Show Me How and Videos](#)
- [Documentation Highlights](#)
- [Particular Issues to Note](#)
- Feature/enhancement descriptions for the respective Alma components and functional areas
  - [Acquisitions](#)
  - [Resource Management](#)
  - [Fulfillment](#)
  - [Resource Sharing](#)
  - [Administration and User Management](#)
  - [Analytics](#)
  - [Alma APIs](#)
  - [Collaborative Networks](#)
  - [Alma Interface Updates](#)
- [Known Issues](#)

# Alma April 2014 Release Highlights

## General

- Combining Databases and Packages into Electronic Collections

Until now, Alma had two electronic collection entities, each with its own mutually exclusive features. The distinction between the two was sometimes confusing and problematic, and they have now been merged into one larger and more flexible entity called “electronic collection.” In addition to other advantages detailed in the release notes, libraries can now expose end users to electronic collections via Primo.

## Acquisitions

- Configure Default Acquisition Method for PO Lines

Many of you will be glad to hear that it is now possible to configure the default acquisition method for PO lines.

- Import Profiles for Multiple Vendors

This new feature allows for configuring New Order import profiles for multiple vendors. This is necessary for cases in which an order is fulfilled by a third party that sends the order to multiple vendors.

## Resource Management

- Linking Local Electronic Collections to Community Zone Electronic Collections

With the April release of Alma, it is possible to link local electronic collections (including services and portfolios) to the Community Zone (CZ). This provides the benefits of CZ updates to the electronic collections/portfolios that you link to the CZ.

- Associating a License on the Portfolio Level

This great new feature allows for associating license information with individual portfolios that are part of an electronic collection. In addition to making changes to the Electronic Portfolio Editor to support this new feature, the following related options have been enhanced/added: More info/View License Information; View It/Alma Resolver Show license link; Acquisitions license details Inventory tab.

- Enhancements to List Pages with Multiple Select Option

Several enhancements have been made to the display of list pages that allow you to make multiple selections (for example, the Portfolio List page when adding portfolios to the CZ for electronic collections). The number of rows selected is displayed at the top of the list, the selected row is highlighted, and the highlighted rows remain after a search is performed.

## Fulfillment

- Specific Fine Payment for Patrons

This feature enables selecting specific patron fines/fees to pay. Previously, it was possible only to pay an amount of money which would then be applied to the patron's total balance, without regard to specific fines/fees. Specific fines can also be paid using self-check machines and API.

- Additional Notices Sent Using SMS

In addition to the option to send hold shelf notifications using SMS, it is now possible to send two new types of notices using SMS: courtesy letters (indicating that the due date for the loan is approaching) and overdue notice letters (indicating that the loan is overdue).

## Resource Sharing

- Anonymize Resource Sharing Borrowing Requests

This feature enables hiding user information in non-active resource sharing borrowing requests.

## Administration and User Management

- Creating and Updating User Sets

This great new feature enables creating, managing, and updating sets of users. User sets can be either logical or itemized. Management activities can then be performed on the users in the set.

## Analytics

- New Requests Subject Area

A new Requests Subject Area has been added to Alma Analytics.

## Alma APIs

- Alma RESTful APIs

With the April release, a new, lightweight user API is available. This API is essentially a parameter of the standard Get User API that enables you to retrieve a user's core information only.

## Collaborative Networks

- Improvements to Deleting Bibliographic Records in the Network Zone (NZ)

Improvements have been made to the deletion of records in a collaborative network environment. If an NZ record has no inventory or PO line associated with it and none of the NZ record's linked Institution Zone (IZ) records has associated inventory or PO lines, the NZ record and all the linked IZ records can be deleted. The IZ records are deleted first and if this deletion completes successfully, the associated NZ record is then deleted.

## Alma Interface Updates

- Time Added to Attachments

When viewing attachments, the time at which the attachment is created is now included in the new 'Attached On' column.

- Jump to Page Feature

You can now jump to a specific page in search results.

# Data Services

The Alma March Central KnowledgeBase and Community Zone package has been applied to the Alma production environment.

## New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 24-February 2014 through 30-March-2014:

- Wiley Online Library 2014 Full Collection
- Wiley Online Library SSH 2014
- Wiley Online Library STM 2014
- Wiley Online Library Open Access 2014
- Wiley Online Library Free 2014
- GNL EIU Country Reports Archive
- IEEE Xplore All Inclusive Standards
- Maney Online
- Oxford Bibliographies
- VLeBooks
- Oxford Biblical Studies Online
- Emerald Management eJournals Collection

## New External Resources That Are Open for Searching

This section highlights the new external resource names. The following external resources were added for this release:

- Universiteit Gent
- SUDOC (Brief Records USMARC)
- Open Vlacc (Vlaamse Centrale Catalogus)
- Catalog of U.S. Government Publications (CGP Z39.50)
- BDZ (BDS)

# Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the April 2014 release of Alma.

## Alma Show Me How – April

### Description

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

### Technical Instructions

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

#### To access Show Me How:

- 1 From the Alma home page, click the **Show Me How** button.  
The How Can We Assist You? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.  
For the April release, the following Show Me How scenarios are available:
  - Assign a Process to an Item
  - Link a Local E-Collection to a CZ E-Collection
  - View License Info of an Electronic Portfolio
  - Add an Electronic Collection of Database Type

## Alma Videos – April

The following new videos are available when you select **Help > What's New Videos** in Alma:

- Add an Electronic Collection
- Link a Local Electronic Collection to a CZ Collection
- Manage License of an Electronic Portfolio

- Multiple Vendors in EOD Import File
- Assign a Process to an Item
- Pay Specific Fines and Fees
- Create a Set of Users Using an Input File
- Bulk Actions on a Set of Users

# Documentation Highlights

In addition to handling fixes to the documentation based on feedback we received, we have added documentation, or improved upon the existing documentation, in the following key areas since the March 2014 release:

- **Electronic Resources – Decision Tree and Workflow** – This new section presents a decision tree for working with electronic resources and explains the workflows to follow based on the various scenarios that the decision tree presents. The section can be found in the main Alma table of contents.
- **Match Methods** – The difference between the 035 (Other System Identifier) Unique OCLC Identifier match methods has been further enhanced with examples that compare the results of the two methods (under Managing Profiles for Record Imports > Configuring New Import Profiles > Creating the Profile Using the Wizard > Explanation of Import Match Methods).
- **Links to Alma PDFs and Release Notes** – Links to all the Alma guides in PDF format as well as the monthly release notes have been added to the online help (under Additional Resources > List of Alma User Guides and Release Notes).
- **Links to Ask the Expert Sessions** – Links to the Ask the Expert Sessions that have been held over the past few months are now available from the online help as well (under Additional Resources > List of Ask the Expert Sessions).

The above will be available with the update of the documentation on the 6<sup>th</sup> of April.

# Particular Issues to Note

The following feature in the April 2014 impacts Alma workflows and functionality and should be carefully reviewed:

- Combining Databases and Packages into Electronic Collections

The following are additional issues to note:

- The re-indexing that was scheduled for April is now planned for May. The enhancements from February and March that were dependent on re-indexing will now be available in May instead of April.
- If you discover a lack of synchronization between Alma and Primo (such as suppressed records being published as non-deleted records), it is recommended that you create a set of problematic records and republish the set to Primo using the Primo republish set of titles job. This ensures that the data is properly synchronized in Primo.
- LDAP users who log in to Alma must do so using a secure LDAP connection. You must therefore select the **Use secure connection** check box when configuring your LDAP profile in Alma. An insecure connection is no longer supported. Note that the connection should be secured with a certificate issued by a recognized certificate authority (such as Comodo, Verisign, or Thawte). Self-signed certificates are not supported.
- An option for IDP-initiated single-sign-on (SSO) to Alma has been made available. Now, instead of a user initiating communication with Alma and Alma communicating with SAML, users can initiate communication with SAML that then initiates communication with Alma. For information on configuring this new option, contact your Ex Libris representative.

All April features are automatically visible to all users with the appropriate user roles/permissions and do not require specific setup or activation.

# Combining Databases and Packages into Electronic Collections – Terminology and Workflow Changes

## Description

Until now, Alma had two electronic collection entities, each with its own mutually exclusive features:

- A package could have services and portfolios attached.
- A database could link to bibliographic records or URLs.

The distinction between a package and a database was problematic mainly due to the following:

- There is no clear difference in the industry between databases and packages (with terminology used differently), and both packages and databases are considered “packages” in the knowledge base.
- Packages did not support the ability to add a bibliographic record on the package level, nor a link to the native interface. Because of this limitation, customers who wanted to publish a package to Primo had to create an additional local database to describe their existing knowledge base package.

For the above reasons, Ex Libris merged the two entities into one larger and more flexible entity called an “electronic collection.” This new entity can include any or all of the following:

- Bibliographic records that describe the electronic collection
- A URL to the native interface of the electronic collection
- Portfolios that are included as part of the electronic collection

Using this functionality, libraries can now display electronic collections through the Primo interface.

---

**Note:** There are a number of known issues regarding this new feature. For details, see the **Known Issues** section at the end of this document.

---

## Scope

Changes to the concept and functionality of the now-termed “electronic collections” impact every area of electronic resource inventory and ordering but, because the changes streamline two previous entities, the interface and flows will be similar to what they have been in the past. Because procedures allow for options from both previous entities, workflows allow for more choices in different combinations than were previously available.

---

**Note:** These changes will not impact existing packages or databases, nor PO lines for packages and databases that have been created up to this point.

---

## User Interface

Changes to the user interface are wide-ranging. Some of the more germane instances are described in this section. Changes that primarily impact behavior and workflow appear in separate sections.

The first change, on the Resource Management section of the Alma menu, combines the **Add Local Package** and **Add Local DB** items into one **Add Local Electronic Collection**. (Figure 1 - New Electronic Collection on the Alma Menu). The new option links to an Electronic Collection Editor page that combines package and DB elements from the previous separate electronic resource editor pages.

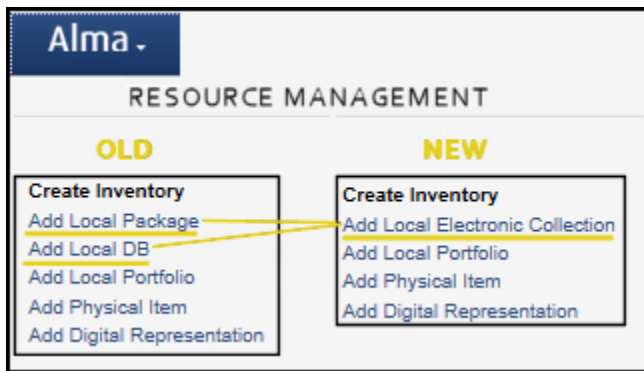


Figure 1 - New Electronic Collection on the Alma Menu

The collection type now contains the former package-database distinction (see figure below). These types will remain in the Alma user interface for transitional purposes, with a plan to phase out many of them as they become obsolete. Ultimately, only the Database (the only new type) and the two package types will remain.

The screenshot shows the 'Electronic Collection Editor' interface. At the top, there is a header with a logo and the title 'Electronic Collection Editor'. Below the header, there are four text input fields: 'Public name' (with a red asterisk indicating it is required), 'Public name (override)', 'Description', and 'Internal description' (which has a scroll bar). Below these fields, there are two columns of collection type options, labeled 'OLD' and 'NEW' in yellow text.

**OLD**

Collection type	Selective package
	Aggregator package

Collection type	A&I database
	Full text database
	Partial full text database
	Other

**NEW**

Collection type	Selective package
	Aggregator package
	Database <b>NEW</b>
	A&I database (to be deprecated)
	Full text database (to be deprecated)
	Partial full text database (to be deprecated)
	Other (to be deprecated)

Figure 2 - Collection Type Transition

Many of the interface changes involve labels for fields. Some of the changes, however, impact the behavior of collections as the system accommodates the increased capabilities of electronic resources.

It is now possible to associate a bibliographic record with any electronic collection using the **Additional descriptive information** field in the Electronic Collection Editor, Additional Information tab. Once the association has been made, a link to the bibliographic record is available through the Resource description link at the top of the page (see figure below).

Electronic Collection Editor Save

Resource description [Bird conservation international Bird conservation international \(Online\) Cambridge University Press \[Cambridge, England\] : Print began with vol. 1, no. 1 \(Mar. 1991\). \[0959-2709\]](#)

Electronic Collection Ornithological Agg  
name

Electronic Collection Description    General Information    **Additional Information**    Notes

**Electronic Collection Information**

Source     Source ID

Creator

Alternative Title

Electronic Collection

Level URL

Select bib record to associate with electronic collection

Electronic Collection  Not Free  Free  
is free?

Electronic Collection  No  Yes  
Proxy Enable

Language

Electronic Collection   
Proxy Selected

Category

Additional descriptive information

Figure 3 - Link Selection to Resource Title Link

Changes to the collection editor include terminology changes and, as shown in Figure 4 - Improvements to the Additional Information Tab, some new fields that are now available to all electronic collections where they had been limited to package or database before.

For example, it is now possible to add a URL to the native interface of any electronic collection. The URL will be accessible through the Primo View It tab. This URL can also be proxied.

Electronic Collection Editor Cancel    Save

Electronic Ornithological Agg  
Collection name

Electronic Collection Description    General Information    **Additional Information**    Notes    Group

**Electronic Collection Information**

Source     Source ID

Creator

Alternative Title

Electronic Collection

Level URL

Electronic Collection is free?  Not Free  Free

Electronic Collection Proxy  No  Yes  
Enable

Electronic Collection   
Proxy Selected

Language

Category

Additional descriptive information

Character set - NEW

Figure 4 - Improvements to the Additional Information Tab

Changes at the PO line level (Figure 5 – Search Results to PO Line Purchase Type for Electronic Collection (Database)) for electronic resources correspond to the new and to-be deprecated fields on the Electronic Collection Editor page.

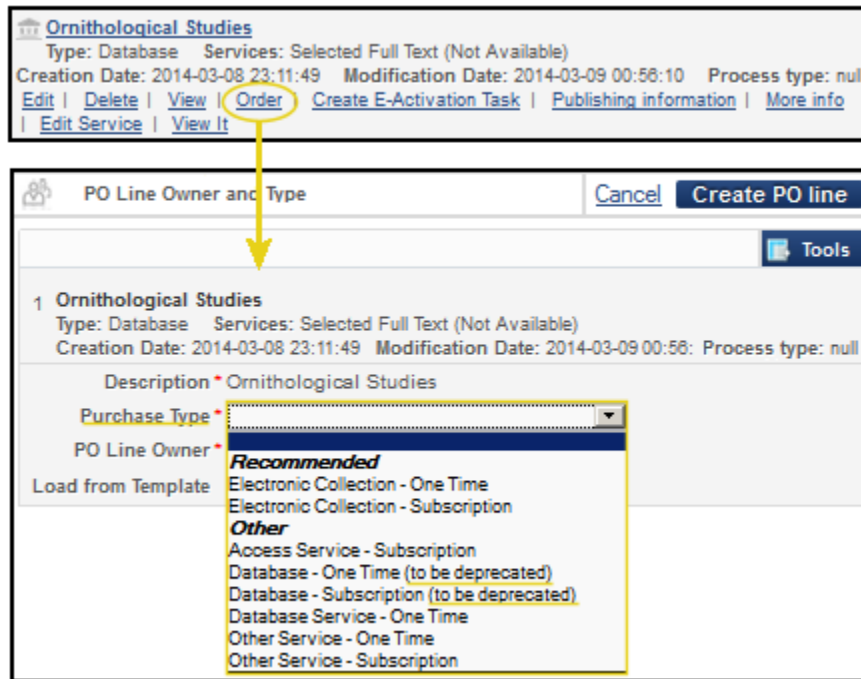


Figure 5 – Search Results to PO Line Purchase Type for Electronic Collection (Database)

Occasionally, you will see new actions or options spanning both of the former entity types on the tabs and wizards of the new interface.

## Publishing

Bibliographic records associated with an electronic collection are published to Primo (unless they are suppressed). When a Primo user locates such a record, he or she receives a link to the native interface of the electronic collection (as defined in the electronic collection resource editor) from the Primo View It tab.

## View It

View It actions in repository search results are now available for all electronic collection types (previously they were only available for database types). Clicking **View It** launches a service linking the user to the native interface of the electronic collection (according to the URL specified in the electronic collection resource editor).

The **View It** link should now appear for both package and database types, in repository search results, as demonstrated in the figure below.

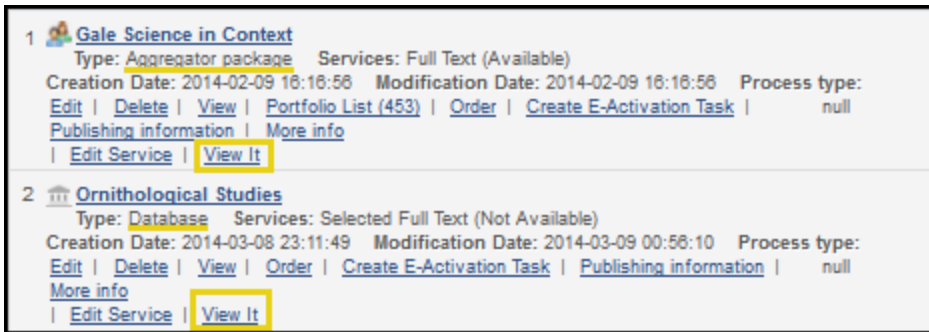


Figure 6 – View It in Search Results for Both Types

## Electronic Resource Activation

The following actions have been modified for tasks relating to the activation of electronic collections (see Actions menu in Figure 7 - Activation Task List below).

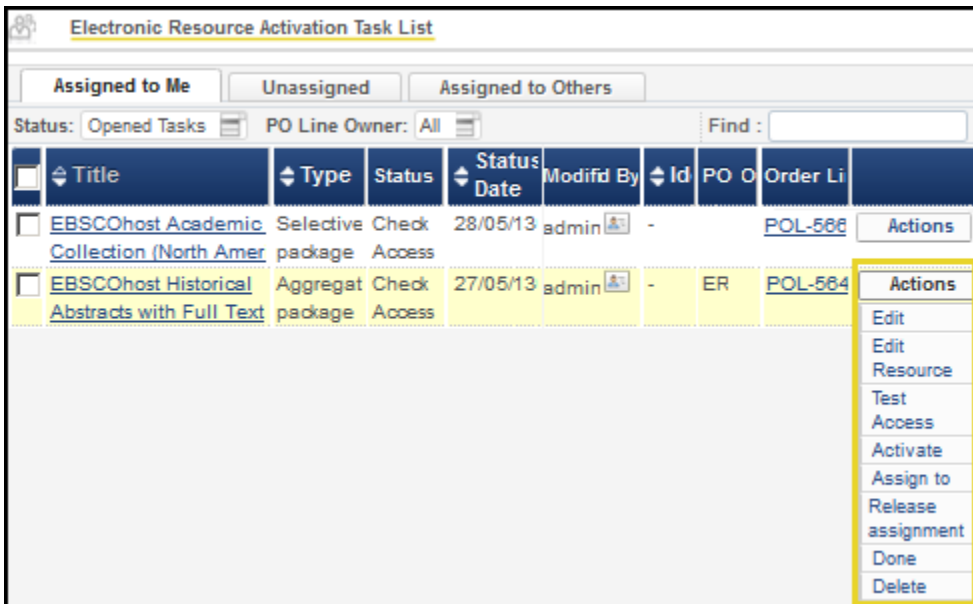


Figure 7 - Activation Task List

The **Test Access** action now appears in the list of Actions if the electronic collection has either of the following:

- A bibliographic record and URL associated with it
- Services associated with it

The following conditions determine the behavior of the Test Access action. If the electronic collection has:

- A BIB/URL with no services, selecting Test Access opens the View It page (as was previously done for databases).

- Services associated with it and no BIB/URL, selecting Test Access opens the Portfolio List (as was previously done for packages).
- Both services and BIB/URL, selecting Test Access opens the Portfolio List (as was previously done for packages).

The **Activate** option appears in the list if the electronic collection is not active. Clicking it will:

- For a local collection, activate the linked services and portfolios (if such entities exist) and open the collection editor with a message "Using the electronic collection editor you can optionally add Service, Portfolios, collection level URL."
- For a global collection, open the activation wizard.

A new item (not shown above), **Suppress/Unsuppress**, appears if the electronic collection has an unsuppressed or suppressed bibliographic record linked to it and a URL. Clicking it will change the value to its opposite, suppressing or unsuppressing the bibliographic record from being published to Primo.

Before selecting **Done**, if the electronic collection has a bibliographic record linked to it, confirm that it is not suppressed. If the electronic collection has services, confirm that they are all active.

### **Activation Wizard**

The activation wizard provides a three-step procedure for activating electronic resources that are linked to the Community Zone. Changes to the wizard include terminology changes that align with the merged collection types as well as added fields.

Figure 8 - Activation Wizard for Electronic Collection, Step 1, Collection and Services Setup

### Active and Inactive Electronic Collections

In repository search results, active and inactive electronic collections are designated by full hue or grayed out icons.




1	 <a href="#">Ornithology of the Southern Hemisphere</a> Type: Selective package Services: Selected Full Text (Available from: 03/24/2014 until: 03/24/2014) Creation Date: 2014-03-25 02:21:40 Modification Date: 2014-03-25 18:37:26 Process type: Full Text <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View</a>   <a href="#">Portfolio List (1)</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Publishing information</a>   <a href="#">Edit Service</a>   <a href="#">View It</a>
2	 <a href="#">Gale Science in Context</a> Type: Aggregator package Services: Full Text (Available) Creation Date: 2014-02-09 16:16:56 Modification Date: 2014-02-09 16:16:56 Process type: Full Text <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View</a>   <a href="#">Portfolio List (453)</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Publishing information</a>   <a href="#">Edit Service</a>
3	 <a href="#">Ornithology Collection</a> Type: Database Services: Selected Full Text (Not Available) Creation Date: 2014-03-09 18:13:25 Modification Date: 2014-03-09 18:13:25 Process type: Full Text <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Publishing information</a>   <a href="#">More information</a>   <a href="#">Edit Service</a>

Figure 9 - Indicators of Active and Inactive Electronic Collections

Electronic collections are active if one of the following conditions is met:

- The electronic collection has at least one available service, and that service has at least one available portfolio.
- The electronic collection contains a URL and is linked to an unsuppressed bibliographic record.

If none of the above applies, the icon will be grayed out.

# Acquisitions

The following section describes the features provided for the Acquisitions component in the April 2014 release of Alma.

## Configure Default Acquisition Method for PO Lines

### Description

It is now possible to configure the default acquisition method for PO lines.

### Technical Instructions

The following roles can access this enhancement:

- Acquisitions Administrator
- General System Administrator

#### To configure the default acquisition method for PO lines:

- 1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**) select **Acquisition Method** under **Purchase Orders**. The following is displayed:

The screenshot shows the Alma configuration interface for the 'Acquisition Method' table. The page title is 'Code Table' and it indicates 'You are configuring: Main Campus'. The 'Table Information' section shows the following details:

- Sub System: ACQUISITION
- Table Name: Acquisition Method
- Updated By: -
- Updated on: -
- Patron Facing: No
- Table Description: Acquisition Method

The 'Acquisition Method' section includes a filter set to 'English' and a table of methods. The table has the following columns: Enabled, Display, Order, Code, Description, Translation, Default Value, Updated By, and Last Updated.

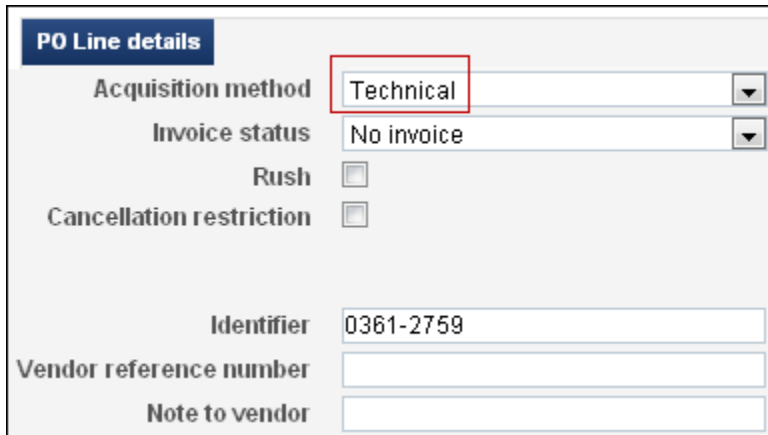
Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated
✓		▼	PURCHASE	Purchase	Purchase	<input checked="" type="radio"/>	-	-
✓	▲	▼	APPROVAL	Approval Plan	Approval Plan	<input type="radio"/>	-	-
✓	▲	▼	GIFT	Gift	Gift	<input type="radio"/>	-	-
✓	▲	▼	TECHNICAL	Technical	Technical	<input type="radio"/>	-	-
✓	▲	▼	DEPOSITORY	Depository	Depository	<input type="radio"/>	-	-
✓	▲	▼	EXCHANGE	Exchange	Exchange	<input type="radio"/>	-	-
✓	▲	▼	VENDOR_SYSTEM	Purchase at Vendor System	Purchase at Vendor System	<input type="radio"/>	-	-

Figure 10 – Configure Default Acquisition Method

- 2 Select the **Default Value** radio button for the acquisitions method that you want to be the default.
- 3 Click **Customize**.

The selected acquisitions method is now the default acquisitions method when creating a new PO line. Existing PO lines are not affected by this configuration.

For example, if you select **Technical** as the default, **Technical** is the default acquisitions method:



The screenshot shows a form titled "PO Line details" with several fields. The "Acquisition method" dropdown menu is highlighted with a red box and contains the text "Technical". Other fields include "Invoice status" (No invoice), "Rush" (checkbox), "Cancellation restriction" (checkbox), "Identifier" (0361-2759), "Vendor reference number", and "Note to vendor".

Figure 11 – Default Acquisition Method

## Import Profiles for Multiple Vendors

### Description

It is now possible to configure New Order import profiles for multiple vendors. This is necessary for cases in which an order is fulfilled by a third party that sends the order to multiple vendors. Configuring New Order import profiles for multiple vendors allows Alma to read EOD files that contain data from multiple vendors.

### Technical Instructions

The following roles can access this enhancement:

- Repository Administrator
- Acquisitions Administrator
- Catalog Administrator
- General System Administrator

## To configure import profiles for multiple vendors:

- 1 On the Run Import page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**), click **Add New Profile**.
- 2 Select **New Order** and click **Next**.
- 3 Fill in the information until page 7 of the wizard as described in the *Alma Resource Management Guide* or Alma online help.
- 4 Select the **Multiple vendors** check box to configure the import profile for multiple vendors. The **Map vendors** check box, **Vendor field** and **subfield**, and **Vendor account field** and **subfield** fields appear.

The screenshot shows the 'Import Profile Details' page in the Alma QA system. The profile type is 'New Order' and the profile name is 'Standard Profile'. The 'EOD General Parameters' section is highlighted with a red box and contains the following fields:

- Physical POLine type: [dropdown]
- Multiple vendors:
- Map Vendors:
- Vendor field: [text input]
- subfield: [text input]
- Vendor account field: [text input]
- subfield: [text input]

Below the red box, there are additional fields:

- Vendor: [dropdown]
- Vendor account: [dropdown]
- PO Line currency: [dropdown, US Dollar]
- Decimal point location: [dropdown, 0]
- Acquisition Method: [dropdown, Purchase]

Figure 12 – Import Profiles for Multiple Vendors

- 5 Enter the vendor field and subfield numbers to indicate where in the EOD file the vendor names are located.
- 6 Enter the vendor account field and subfield numbers to indicate where in the EOD file the vendor account is located.
- 7 Click **Save**.

The import profile is configured for multiple vendors.

## To map the vendor name as it appears in Alma with the vendor name as it appears in the EOD file:

- 1 Before saving the import profile, select **Map vendors**.
- 2 Click **Save**.

- 3 From the Import Profile List, select **Actions > Edit** for the import profile for which you want to map the vendors.
- 4 Click the **Mapping** tab. The Mapping tab with the Vendor Mapping section is displayed.

**Figure 13 – Vendor Mapping**

- 5 In the **Source value** field, enter the vendor name as it appears in the EOD file.
- 6 From the **Vendor** field, select the vendor that exists in Alma.
- 7 From the **Vendor account** field, select the Alma vendor account.
- 8 Click **Save**.

The vendor name in Alma is mapped to the vendor name in the EOD file.

## Alternative Call Number

### Description

You can now add an item level alternative call number to New Order, Update Inventory, and Repository import profiles. This is useful to keep track of a group of items that are placed in a special location, for example. Note that the alternative call number type is taken from the call number type defined for the location.

### Technical Instructions

The following roles can access this enhancement:

- Repository Administrator
- Acquisitions Administrator
- Catalog Administrator
- General System Administrator

#### To add an alternative call number to an import profile:

- 1 On the Run Import page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**) select **Actions > Edit** for an Update Inventory profile (for example).

2 Click the **Inventory Information** profile tab. The following is displayed:

The screenshot shows a 'Physical Item Mapping' form with the following fields and values:

Field	Value	Subfield	Value
Material type	book		
Library field		subfield	
Location field	949	subfield	t
Default library	Main Library		
Map library/location	<input type="checkbox"/>		
Number of items field	949	subfield	0
Barcode field	949	subfield	7
Item policy field		subfield	
Alternative Call Number		subfield	

The 'Alternative Call Number' row is highlighted with a red border.

Figure 14 – Alternative Call Number

- 3 Enter the alternative call number field and subfield numbers to indicate where in the EOD file the alternative call number is located.
- 4 Click **Save**.

The alternate call number mapping is saved to the profile.

## Enumeration/Chronology Information Added to Receiving Slip Notification Letter

### Description

Enumeration and chronology information has been added to the Receiving Slip Notification letter. This letter is a slip that is printed out by library staff with item information that is put in a new item when it arrives at the library. Until now, the Receiving Slip Notification letter did not contain enumeration and chronology information, such as the volume number for serials. Now this information has been added.

The addition of enumeration and chronology information to the Receiving Slip Notification letter does not occur automatically for customers who have customized the letter. Customers who have customized the letter must configure the letter manually for the enumeration and chronology information to appear in the letter.

### Technical Instructions

The following roles can access this enhancement:

- Letter Administrator
- General System Administrator

**To configure the Receiving Slip Notification letter to display enumeration and chronology information:**

- 1 On the Configuration Files page (**Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**) click **Customize** for the Receiving Slip Notification letter. The Configuration File page opens
- 2 Add the following to the content of the letter:

```
<tr>
  <td>
    <b>@@enumeration_a@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_a"/></td>
</tr>
<tr>
  <td>
    <b>@@enumeration_b@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_b"/></td>
</tr>
<tr>
  <td>
    <b>@@enumeration_c@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_c"/></td>
</tr>
<tr>
  <td>
    <b>@@enumeration_d@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_d"/></td>
</tr>
<tr>
  <td>
    <b>@@enumeration_e@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_e"/></td>
</tr>
<tr>
  <td>
    <b>@@enumeration_f@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_f"/></td>
</tr>
<tr>
  <td>
    <b>@@enumeration_g@@: </b>
    <xsl:value-of
select="notification_data/physical_item_info/enumeration_g"/></td>
</tr>
<tr>
```

```

        <td>
            <b>@@enumeration_h@@: </b>
            <xsl:value-of
select="notification_data/physical_item_info/enumeration_h"/></td>
        </tr>
        <tr>
            <td>
                <b>@@chronology_i@@: </b>
                <xsl:value-of
select="notification_data/physical_item_info/chronology_i"/></td>
            </tr>
            <tr>
                <td>
                    <b>@@chronology_j@@: </b>
                    <xsl:value-of
select="notification_data/physical_item_info/chronology_j"/></td>
                </tr>
                <tr>
                    <td>
                        <b>@@chronology_k@@: </b>
                        <xsl:value-of
select="notification_data/physical_item_info/chronology_k"/></td>
                    </tr>
                    <tr>
                        <td>
                            <b>@@chronology_l@@: </b>
                            <xsl:value-of
select="notification_data/physical_item_info/chronology_l"/></td>
                        </tr>
                        <tr>
                            <td>
                                <b>@@chronology_m@@: </b>
                                <xsl:value-of
select="notification_data/physical_item_info/chronology_m"/></td>
                            </tr>

```

- 3 Click **Customize**. The letter is customized to display enumeration and chronology information.

## Other Acquisitions Enhancements

- A link, **Generate Export XML**, is now visible to Invoice Operators for invoices with the following statuses: Ready to Be Paid, Sent to ERP, and Closed. This link generates an XML file for the invoice, which can then be sent by email to the vendor (for example, if the vendor claims not to have received the invoice).

# Resource Management

The following sections describe the functions provided for the Resource Management component in the April 2014 release of Alma.

## Linking Local Electronic Collections to Community Zone Electronic Collections

### Description

With the April release of Alma, you can now link local electronic collections (including services and portfolios) to the Community Zone (CZ). This provides the benefits of CZ updates to the electronic collections/portfolios that you link to the CZ.

This enhancement is implemented in the following manner:

- Initial – When you initially link an electronic collection to the CZ, it will provide the options to attempt to link the electronic collection, the service, and all the local portfolios.
- Ongoing – Once a collection is linked to the CZ, you have the option to attempt to link any local portfolios that are part of the collection to CZ portfolios that are part of the collection.

This capability is implemented with the new **Link to Community** action that is the first step in the process of linking resources to the CZ. As part of this implementation, the system automatically executes a job to process your linking request to the CZ and provides a report of the results through **Monitor Jobs (Administration > Manage Jobs)**, a familiar facility that is currently available in Alma.

The new linking job called **Link local electronic resources to the Community Zone job** provides the following report information when the job has completed running:

- Total number of local portfolios processed
- Number of local portfolios linked to the CZ
- Number of local portfolios with no match
- Number of multiple bibliographic records with matches (with a link to a set containing MMS IDs)
- Number of multiple portfolio matches (with a link to a set containing MMS IDs)
- Number of bibliographic records linked to the Network Zone for collaborative networks (with a link to a set containing MMS IDs)
- Number of duplicate portfolios

The following local package, service, and portfolio information is kept when the linking job is run:

- Group settings
- PO line and license
- Public name (electronic collection)
- Description
- Notes
- Library
- PDA ID (portfolios)

There are related user interface changes to previously existing options that are a part of this enhancement. For example, the **Locate and link** (see Figure 15) action previously available as an action for standalone electronic portfolios in the search results is now labeled **Link to Community** (see Figure 16) for consistency with the new feature.

---

**Note:** Only (local) portfolios that are not already linked to the CZ display the **Link to Community** action in the search results.

---

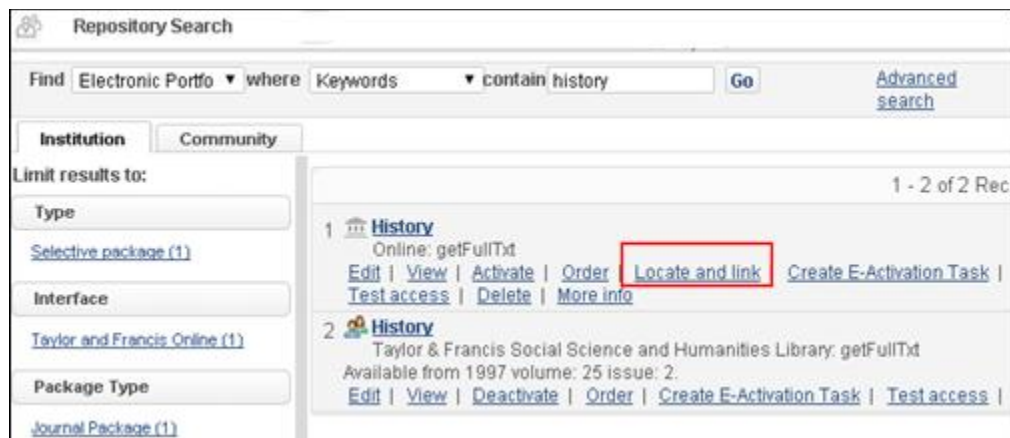


Figure 15 - Previously Locate and Link

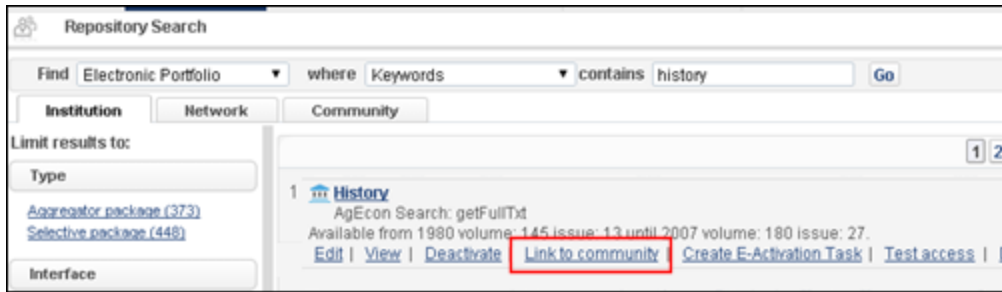


Figure 16 - Link to Community for Standalone Electronic Portfolios

## Technical Instructions

The Electronic Inventory Operator role can link local electronic collections to the Community Zone.

### To link a local electronic collection to the Community Zone:

- 1 Search for a local electronic collection that you want to link to the CZ. Your search results display the **Link to Community** action.

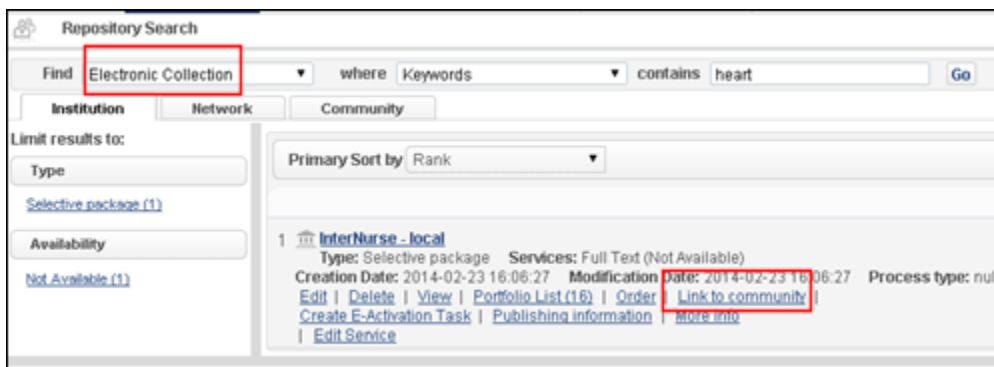


Figure 17 - Electronic Collection Link to Community Action

- 2 Click **Link to Community**. The Link Electronic Resources to Community page opens. The page contains the following sections:
  - Local Information. Within this section, the following information is provided:
    - Electronic collection name – This is the local electronic collection name that displayed in your search results
    - Type – This is the collection type (Selective package, Aggregator package, or Database)
    - Interface name
    - Service type (Full text, Select full text, or None)
    - Total number of portfolios

- Number of local portfolios
- Community Information. Use this section to identify the name of the electronic collection to which you want to link in the CZ. Once you have specified this information, the **Type**, **Interface name**, and **Service type** information is updated based on the information provided by the CZ link.
- Bibliographic Records Configuration. Use this section to identify how you want the system to utilize bibliographic record information available in the CZ. If you select **Yes** and a portfolio match is found in the CZ, the bibliographic record associated with the linked portfolio is the CZ bibliographic record. If you select **No** and a portfolio match is found in the CZ, the portfolio that is linked to the CZ portfolio will use the local bibliographic record. The match routine for this process uses either the ISSN or the ISBN identifier to confirm a match between the local portfolios in the electronic collection being linked with portfolios in the CZ.

Figure 18 - Link Electronic Resources to Community Page

- 3 Using the browse capability of the **Electronic collection name** option, locate the electronic collection in the CZ to which you want to link.

Figure 19 - Browse CZ for Electronic Collection to Link To

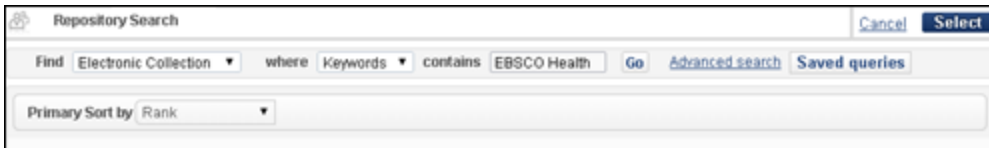


Figure 20 - Enter Browse Criteria

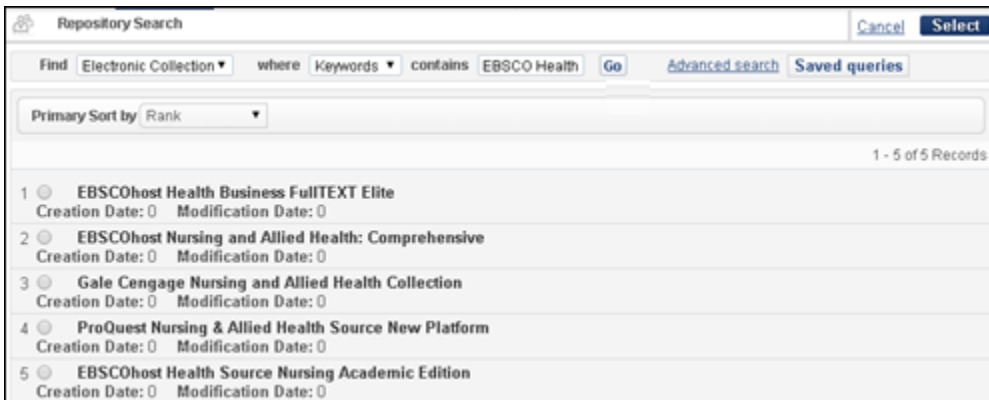


Figure 21 - Browse Results

- 4 Select an electronic collection (radio button) from the list of results and click the **Select** button.

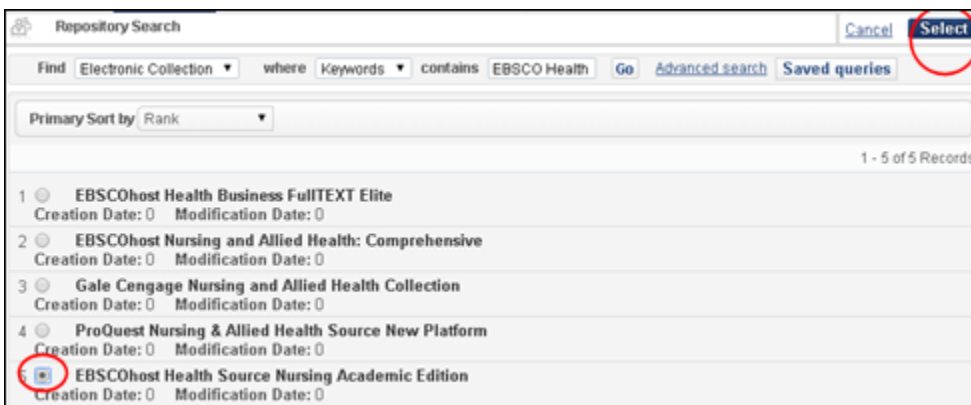


Figure 22 - Select from the Results List

Alma displays your selection and related information on the Link Electronic Resources to Community page.

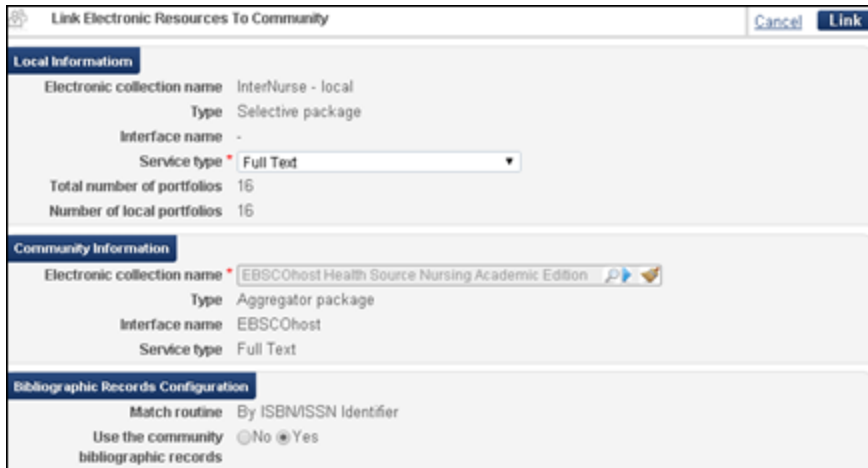


Figure 23 - Electronic Collection Name Selected from the CZ

**Note:** The fields in the Community Information section and the Bibliographic Records Configuration sections are dynamically updated once you have selected/entered the electronic collection name from the CZ

- 5 Select **Yes** or **No** for the **Use the community bibliographic records** option and click **Link**. A pop-up dialog box opens with a summary/warnings regarding the linking selections that you have made.

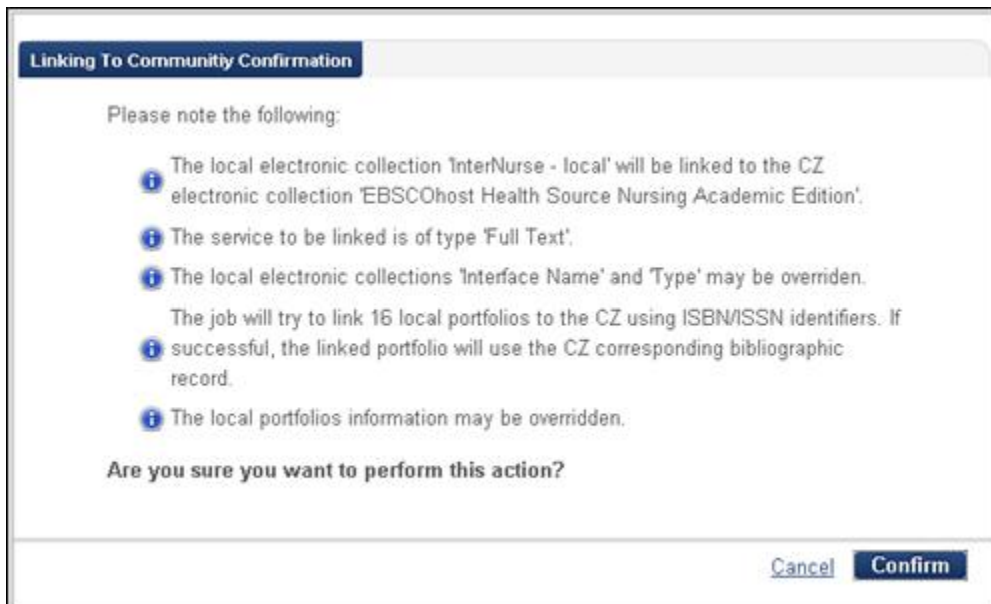


Figure 24 - Linking Summary/Warnings

- 6 Review the information in the pop-up dialog box and, if everything is in order, click **Confirm**. The system displays a successful confirmation message that the linking job (your request) has been submitted. (This is the linking job that Alma automatically runs when you process a CZ link request as described in the previous steps.)

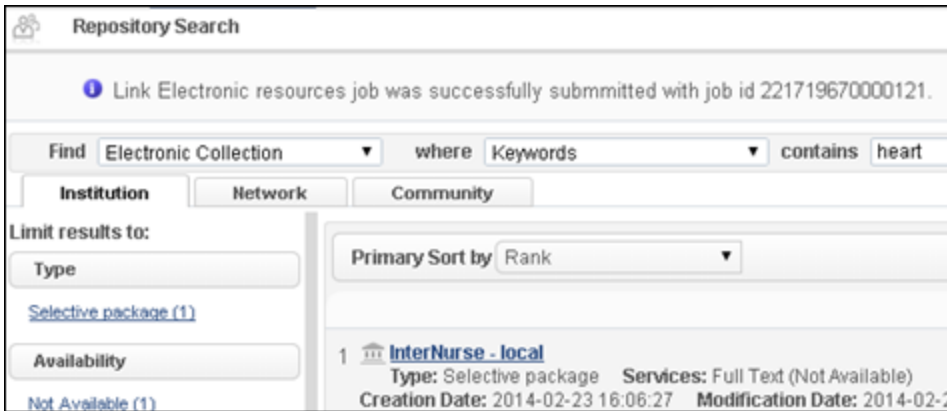


Figure 25 - Job Submitted Successfully Message

- 7 Check the Job Monitor to review the status of your CZ linking job.
  - a Open the **Monitor Jobs** page (**Administration > Manage Jobs**).

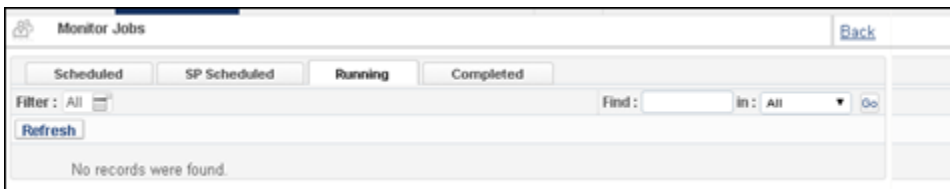


Figure 26 - Monitor Jobs Page

- b Select the **Completed** tab.

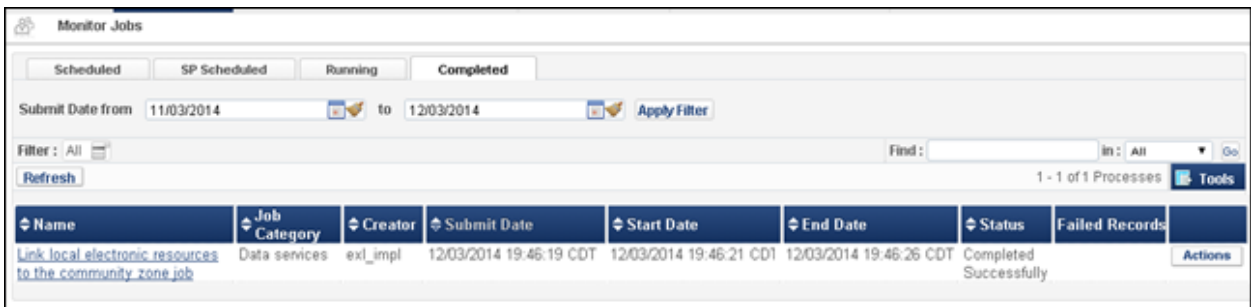


Figure 27 - Monitor Jobs Completed Tab

- c Locate the **Link local electronic resources to the Community Zone job** to display your job results.
      - d Select **Actions > Report** (or click the **Link local electronic resources to the Community Zone job** link in the Name column). The Job Report page opens.

Job Report		<a href="#">Back</a>	
Process ID	22171967000121	Name	Link local electronic resources to the community zone job
Started on	12/03/2014 19:46:21 CDT	Finished on	12/03/2014 19:46:26 CDT
Total run time	5 Seconds	Created by	exl_impl
Status	Completed Successfully	Status date	12/03/2014 19:46:26 CDT
Records processed	16	Records with exceptions	-
<b>Counters</b>			
Total local portfolios processed:	16		
Number of portfolios linked to CZ:	16		
Number of portfolios with no match:	0		
Multiple bibliographic records matches:	0		
Multiple portfolios matches:	0		
Number of bibliographic records linked to the NZ:	0		
Number of duplicate portfolios:	0		

Figure 28 - CZ Linking Job Report

To link a local portfolio to the CZ from the Electronic Service Editor page when the portfolio is part of a CZ-linked service/electronic collection:

- 1 Locate the CZ-linked electronic collection that contains the local portfolio you want to link to the CZ.

Repository Search	
Find	Electronic Collection where Keywords contains SpringerLink Books Medicine : <a href="#">Go</a>
Institution	Network Community
Limit results to:	Primary Sort by Rank
Type	
<a href="#">Aggregator package (1)</a>	
Interface	
<a href="#">Springer Link (1)</a>	
Electronic Collection Type	
<a href="#">Book Package (1)</a>	
	<p>1  <b>SpringerLink Books Medicine 2012</b></p> <p>Type: Aggregator package Services: Full Text (Available)</p> <p>Creation Date: 2014-03-13 03:36:25 Modification Date: 2014-03-13 03:36:25 Process type: null</p> <p><a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View</a>   <a href="#">Portfolio List (2)</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Publishing information</a>   <a href="#">More info</a>   <a href="#">Edit Service</a></p>

Figure 29 - Electronic Collection Search Results

---

**Note:** There is no **Link to Community** action option for this electronic collection search result since it is already linked to the CZ.

---

- 2 Click **Edit Service** for the electronic collection containing the local portfolio that you want to link to the CZ. The Electronic Service Editor page opens.
- 3 Select the **Portfolios** tab.



Figure 30 - Portfolios Tab

- 4 Select the check box for the local portfolio that you want to link to the CZ and click **Link Local Portfolios to Community**.

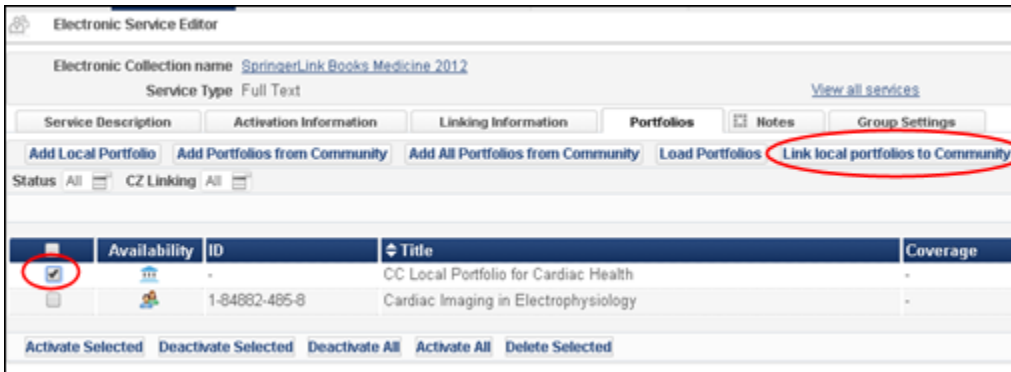


Figure 31 - Select Local Portfolio and Link to CZ

The Link Electronic Resources to Community page opens.



Figure 32 - Link Electronic Resources to Community Page

- 5 In the Bibliographic Records Configuration section, select **Yes** or **No** for the **Use the community bibliographic records** option and click **Link**. The system displays a pop-up dialog box with a summary/warning of the linking actions.

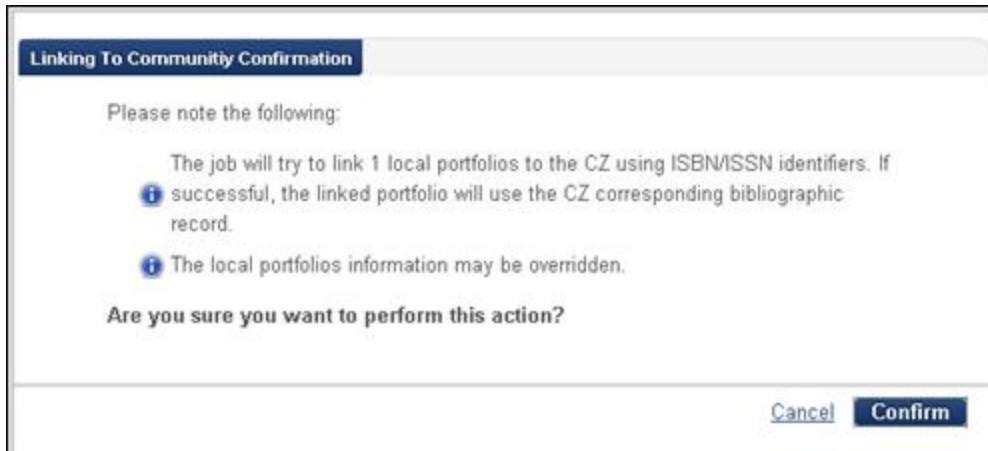


Figure 33 - Linking Summary/Warning

- 6 Review the information that is provided and if everything is acceptable, click **Confirm**. The link electronic resources job successfully submitted message displays on the Electronic Service Editor page.

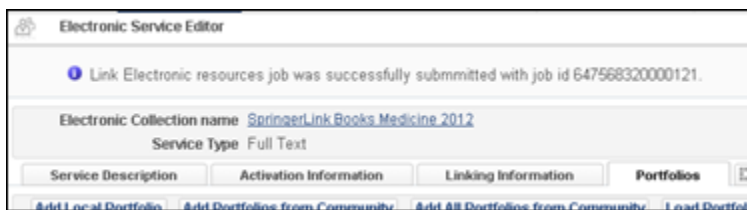


Figure 34 - Successfully Submitted Message

- 7 Check the Job Monitor to review the status of your linking job.
  - a Open the **Monitor Jobs** page (**Administration > Manage Jobs**).
  - b Select the **Completed** tab.
  - c Locate the **Link local electronic resources to the Community Zone job**.

Monitor Jobs

Scheduled | SP Scheduled | Running | **Completed**

Submit Date from 12/03/2014 to 13/03/2014 Apply Filter

Filter: All Refresh

Name	Job Category	Creator	Submit Date	Start Date	End Date
<a href="#">Link local electronic resources to the community zone job</a>	Data services	exl_impl	13/03/2014 04:10:54 AM IST	13/03/2014 04:10:54 AM IST	13/03/2014 04:10:54 AM IST
<a href="#">Users - Sync/Refresh/Cancel using profile Student Information System</a>	Users	System	13/03/2014 04:00:01 AM IST	13/03/2014 04:00:23 AM IST	13/03/2014 04:00:23 AM IST
<a href="#">Users - Remove Dements Blocks</a>	Fulfillment	System	13/03/2014 04:00:01 AM IST	13/03/2014 04:00:22 AM IST	13/03/2014 04:00:22 AM IST
<a href="#">Activate/Deactivate Courses</a>	Fulfillment	System	13/03/2014 04:00:01 AM IST	13/03/2014 04:00:01 AM IST	13/03/2014 04:00:01 AM IST
<a href="#">SaaS - Generate and Distribute Analytic Reports and Dashboards</a>	SAAS operator	System	13/03/2014 03:00:01 AM IST	13/03/2014 03:00:35 AM IST	13/03/2014 03:00:35 AM IST
<a href="#">Notifications - Send Courtesy Notices and Handle Loan Renewals</a>	Fulfillment	System	13/03/2014 03:00:00 AM IST	13/03/2014 03:01:44 AM IST	13/03/2014 03:01:44 AM IST
<a href="#">Authorities - Preferred Term Correction</a>	Repository	System	13/03/2014 03:00:00 AM IST	13/03/2014 03:03:13 AM IST	13/03/2014 03:03:13 AM IST

Figure 35 - Linking Job on the Completed Tab

- d Select **Actions > Report** or click the **Link local electronic resources to the Community Zone job** link in the Name column to display the job report.

Job Report Back

Process ID 647578870000121 Name Link local electronic resources to the community zone job

Started on 13/03/2014 04:43:23 AM IST Finished on 13/03/2014 04:43:45 AM IST

Total run time 22 Seconds Created by exl\_impl

Status Completed Successfully Status date 13/03/2014 04:43:45 AM IST

Records processed 1 Records with exceptions -

**Counters**

Total local portfolios processed: 1

Number of portfolios linked to CZ: 1

Number of portfolios with no match: 0

Multiple bibliographic records matches: 0

Multiple portfolios matches: 0

Number of bibliographic records linked to the NZ: 0

Number of duplicate portfolios: 0

Figure 36 - Linking Job Report

- 8 Confirm your linking results.
  - a Search for the electronic collection containing the portfolio that you linked to the CZ and click **Edit Service** for that collection.
  - b Select the **Portfolios** tab.



Figure 37 - Confirm CZ Link

---

**Note:** The icon has changed to indicate that the portfolio is now linked to the CZ.

---

## Associating a License on the Portfolio Level

### Description

With this release, Alma has been enabled to associate license information with individual portfolios that are part of an electronic collection. With the appropriate role, you can access the options to specify a license for an individual portfolio; or when one is not specified at the portfolio level, the system associates the electronic collection license (when one has been identified for the electronic collection) with the portfolio. In addition to making changes to the Electronic Portfolio Editor to support this new feature, the following related options have been enhanced/added:

- More info/View License Information
- View It/Alma Resolver Show license link
- Acquisitions license details Inventory tab

### **More Info/View License Information**

On the Repository Search page, the **View License Information** link that previously displayed with the **All titles** search results (see Figure 38) has now been replaced with a **Licenses** link in the **More info** pop-up dialog box (see Figure 39). In the **More info** dialog box, click the number (hyperlink) to display the details of the license information. For an electronic collection, the **More info Licenses** number represents the number of different licenses related to the electronic collection. This includes the license associated with the electronic collection and the different licenses that may be associated with the portfolios within the collection. The **More info** dialog box has been updated throughout the search facility for all portfolio/electronic collection search results to include the **Licenses** link/information.

1 **History**  
**Journal** (Washington, DC : HELDREF Publications Print began with v. 1, no. 1 (Oct. 1972).)  
 ISSN: 0361-2759  
 Subject: History Book reviews Periodicals.  
 Language: English **Medium Type:** [electronic resource]. **Record number:** (CONSER) 2006212199  
**Availability:** [Electronic version](#) at Taylor & Francis Social Science and Humanities Library: Full Text  
[View It](#) | [Edit](#) | [Request](#) | [Document Delivery](#) | [Portfolio List](#) | [View License Information](#) | [More info](#)

Figure 38 - Previous View License Information Link

1 **SpringerLink Books Biomedical and Life Sciences**  
 Type: Selective package **Services:** Full Text (Available)  
 Creation Date: 2012-12-10 19:00:00 **Modification Date:** 2014-03-13 16:26:24 **Process type:** null  
[Edit](#) | [Delete](#) | [View](#) | [Portfolio List \(9806\)](#) | [Order](#) | [Create E-Activation Task](#) |  
[Publishing information](#) | [More info](#)

2 **Title** SpringerLink  
 Books  
 Biomedical  
 and Life  
 Sciences

3 **Related** No Related  
**Records** Records  
**Orders** No Orders  
**Licenses** 1

Figure 39 - More Info Dialog Box with the Licenses Link

### View It/Alma Resolver Show License Link

When you use the **View It** link to display a resource's information using Alma Resolver, the **Show (Hide) license** link on the Alma Resolver page now displays the license information defined at the portfolio level. Previously, the **Show license** link only displayed license information defined at the collection level.

[Display in a new window](#)  
Source: History [0361-2759]

Full text available at: [test load](#) [Show license](#)  
Available from 1972 volume: 1 issue: 1 until 1996 volume: 25 issue: 1.  
Full text available at: [EBSCOhost World History Collection](#)  
Available from 1996. Most recent 1 year(s) 6 month(s) not available  
Full text available at: [Gale U.S. History in Context](#) [Hide license](#)  
Available from 1997 until 2009.

**License Terms**  
Digitally copy: PERMITTED

Full text available at: [SHEDL Cambridge University Press Journals](#) [Show license](#)  
Available from 1888.  
Full text available at: [local package](#)  
Available from 2008 volume: 41.  
Full text available at: [view full text](#)  
DB available at: [History - test db](#) [Show license](#)

**Additional services**  
[test](#)

Figure 40 - Alma Resolver Show (Hide) License Link

### ***Acquisitions License Details Inventory Tab***

In Acquisitions, the Inventory tab for license details has been enhanced for working with portfolio license information.

In the Active Resources section, the Filter has been enhanced to filter on both Electronic Collection and Portfolios.

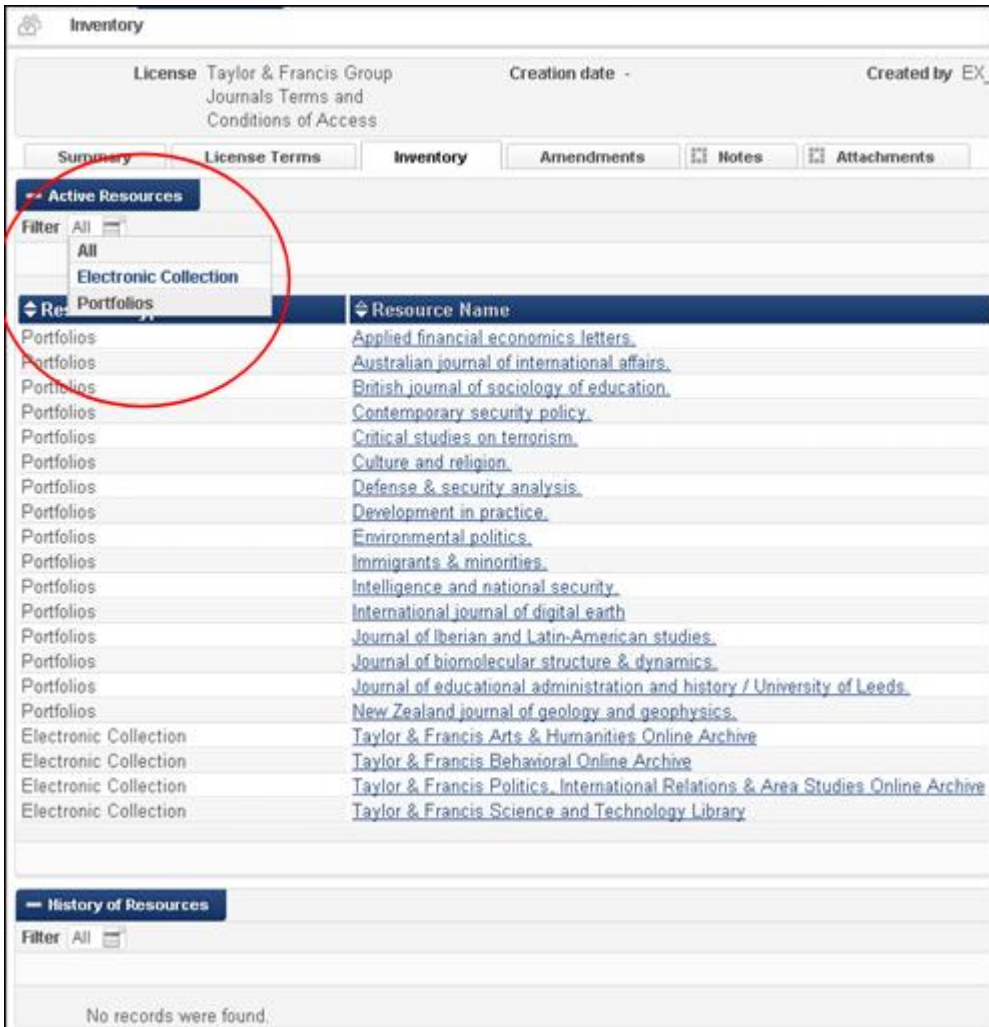


Figure 41 - Active Resources Section Filter

In the History of Resources section, the Filter has been enhanced to filter on both Electronic Collection and Portfolios.



Figure 42 - History of Resources Section Filter

The Resource Type column has been added to the Inventory tab.

Resource Type	Resource Name
Electronic Collection	<a href="#">Taylor &amp; Francis Arts &amp; Humanities Online Archive</a>
Electronic Collection	<a href="#">Taylor &amp; Francis Behavioral Online Archive</a>
Electronic Collection	<a href="#">Taylor &amp; Francis Politics, International Relations &amp; Area Studies Online Archive</a>
Electronic Collection	<a href="#">Taylor &amp; Francis Science and Technology Library</a>
Electronic Collection	<a href="#">Taylor &amp; Francis Social Science and Humanities Library</a>

Figure 43 - Resource Type Column

## Technical Instructions

The Electronic Inventory Operator role can associate licenses to individual portfolios that are part of an electronic collection.

**To associate a license to an individual portfolio that is part of an electronic collection:**

- 1 Locate the electronic collection that contains the portfolio to which you want to add license information. For this example, note the number of **Licenses** identified in the More info pop-up dialog box, and click **Edit** to view the license information for the SpringerLink Books Biomedical and Life Sciences electronic collection (that displays in the General Information tab).

1	<b>SpringerLink Books Biomedical and Life Sciences</b> Type: Selective package Services: Full Text (Available) Creation Date: 2012-12-10 19:00:00 Modification Date: 2014-03-13 16:26:24 Process type: null <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View</a>   <a href="#">Portfolio List (9806)</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Publishing information</a>   <a href="#">More info</a>
2	<b>Title</b> SpringerLink Books Biomedical and Life Sciences Services: Full Text (Available) Modification Date: 2013-01-30 09:40:09 Process type: null (2603)   <a href="#">Create E-Activation Task</a>
3	<b>Related Records</b> No Related Records <b>Orders</b> No Orders <b>Licenses</b> 1

Figure 44 - Note Licenses for the Example

Electronic Collection Editor

Electronic Collection name SpringerLink Books Biomedical and Life Sciences

Electronic Collection Description | **General Information** | Additional Information | Notes

**Summary and Inventory Information**

Electronic Collection type Selective package

Interface Name Springer Link

Process type -

Created by SFX (12/10/2012)

Services Full Text

Updated by exl\_impl (03/13/2014)

**Acquisitions and License Information**

PO Line

Activation date

License Consortium License Agreement E

PO line details -

Expected activation date

View license details Consortium License Agreement SpringerLink Information System

Authentication note

Public note

Figure 45 - General Information Tab

- From your search results, click the **Portfolio List <number of portfolios>** link (for this example, the SpringerLink Books Biomedical and Life Sciences electronic collection). The list of portfolios displays for the SpringerLink Books Biomedical and Life Sciences electronic collection.

Portfolio List for SpringerLink Books Biomedical and Life Sciences

Select All

1	<b>Developments in Sustainable Chemical and Bioprocess Technology</b> SpringerLink Books Biomedical and Life Sciences: getFullTxt <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">More info</a>
2	<b>Fundamentals of Pharmaceutical Nanoscience</b> SpringerLink Books Biomedical and Life Sciences: getFullTxt <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">More info</a>
3	<b>Dynamic Models of Infectious Diseases</b> SpringerLink Books Biomedical and Life Sciences: getFullTxt <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">More info</a>
4	<b>Encyclopedia of Pain</b> SpringerLink Books Biomedical and Life Sciences: getFullTxt <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">More info</a>
5	<b>One Health: The Human-Animal-Environment Interfaces in Emerging Infectious Diseases</b> SpringerLink Books Biomedical and Life Sciences: getFullTxt <a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Deactivate</a>   <a href="#">Order</a>   <a href="#">Create E-Activation Task</a>   <a href="#">Test access</a>   <a href="#">More info</a>

Figure 46 - Portfolio List Example

- Click **Edit** for the portfolio to which you want to assign a different license. The Coverage Information tab on the Electronic Portfolio Editor page opens.
- Select the **Portfolio Information** tab.
- Browse (from the License field) to locate the license that you want to assign to this portfolio (different from the license for the electronic collection in which this portfolio is a member).

Electronic Portfolio Editor

Resource description [Developments in Sustainable Chemical and Bioprocess Technology Springer US 2013 \[1-4614-6207-X\]](#)

Electronic Collection name [SpringerLink Books Biomedical and Life Sciences](#)

Service Type Full Text

Portfolio Information    Linking Information    Coverage Information    Notes

Portfolio availability  Not Available  Available    Electronic material type Book

Activation date 12/30/2013    Expected activation date -

Library

Electronic Collection PO Line -    PO line details -

PO Line

Electronic collection license [Consortium License Agreement](#)    View license details -

[SpringerLink Information System](#)    PDA name -

License    PDA ID -

Created by electronic inventory creator (12/29/2013)    Updated by electronic inventory creator (12/29/2013)

Authentication note

Public note

Internal description

Figure 47 - Browse for License

Licenses and Amendments

Filter: All    Find:    In: Name    Go

Name	License code	License type	Licensor Code	Status	Start date	End date
13th Amendment to 1-89Z7PO	381960	License	-	Active	01/01/2012	12/31/2012
19th Century Parliamentary Papers Addendum	104866	License	-	Active	11/01/2006	10/31/2007
2008 Emerald Publishing Group Ltd./Palinet Consortium Member Agreement	L-UKEMERALD	License	UKEMERALD	Active	01/01/2008	12/31/2010
2008 Incisive Media PLC Academic Site License Agreement	158587	License	-	Active	05/14/2008	05/13/2009
2011 SAGE Reference Online Amendment	365850	License	-	Active	07/12/2011	-

Figure 48 - Licenses and Amendments Page/Options

**Note:** Use the Find option to narrow the list of licenses displayed.

- Select the radio button next to the license to be assigned to the portfolio and click **Select**.

Licenses and Amendments

Filter: All    Find: medical    In: Name    Go    Advanced Search

1 - 1 of 1 Records

Name	License code	License type	Licensor Code	Status	Start date	End date	Signed on
<input checked="" type="radio"/> American Medical Association Publications Backfiles Agreement	249920	License	ILUAMA	Active	01/28/2010	12/31/2050	-

Cancel    Select

Figure 49 - Select License

The new license information displays in the license field in the Portfolio Information tab on the Electronic Portfolio Editor page.

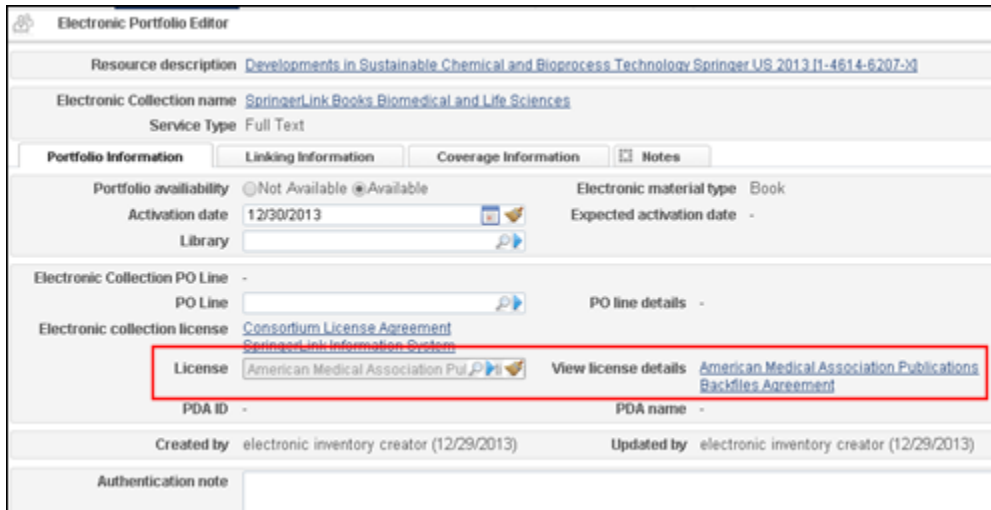


Figure 50 - Portfolio License Information Selected

- Click **Save**. The system returns you to the list of portfolios page for the SpringerLink Books Biomedical and Life Sciences electronic collection with a confirmation message indicating that the portfolio record was successfully updated (with the new license information).

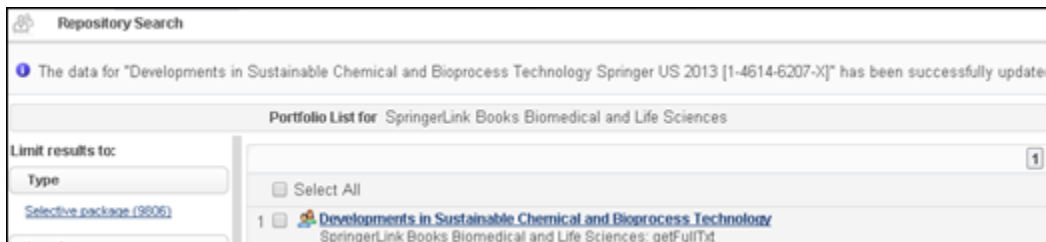


Figure 51 - Successfully Updated Message for Portfolio License Selected

- Click the **More info** link. It now displays 2 for Licenses instead of 1.

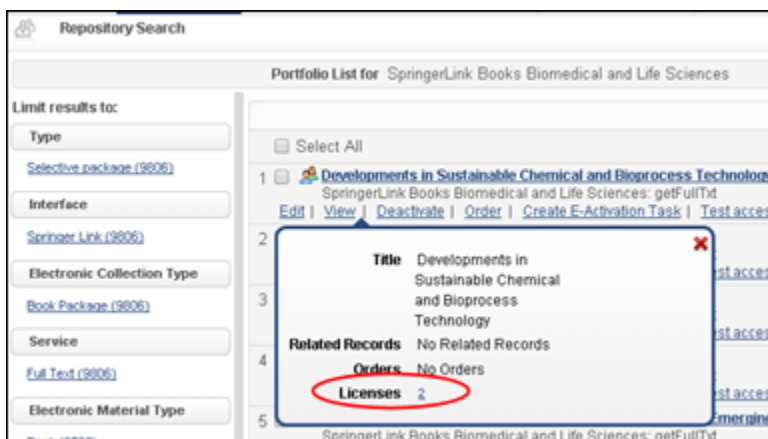


Figure 52 - Licenses Updated to 2

# New Import Processing Options for Electronic Portfolios and Linked Bibliographic Records

## Description

The metadata import capability has been expanded to include deleting electronic portfolios attached to bibliographic records and bibliographic records that have no inventory in instances where deleting the electronic portfolios leaves the bibliographic records without any inventory. This has been implemented with the following additional options provided in the Alma Repository and Update Inventory import profiles:

- **Allow bibliographic record deletion** (in the Match Profile tab) for records that are identified for deletion, that is, *d* is in position 5 of the leader (see Figure 53)
- **Delete/deactivate portfolios when bibliographic record marked for delete** (in the Inventory Information tab)

When the system tries to delete a portfolio and there is a PO line connected, it deactivates the portfolio instead.

---

**Note:** A bibliographic record can be deleted only when there is no PO line or inventory connected to it, and a portfolio can be deleted only when there is no PO line connected to it.

---

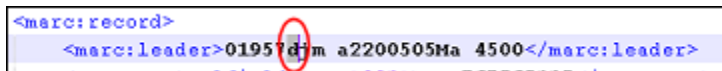
A screenshot of a MARC record's leader field. The text is: <marc:record> <marc:leader>01957djm a2200505Ma 4500</marc:leader>. The character 'd' at the 5th position of the leader field is circled in red.

Figure 53 - d in Position 5 of the Leader

For New Order import profiles, the **Allow bibliographic record deletion** and **Delete/deactivate portfolios when bibliographic record marked for delete** options display but are inactive.

In some cases when the record is not imported, the following inventory actions may still be taken:

- When the record is locked by another user or process, the record is skipped and nothing is done to the inventory (similar to the existing process in this situation).
- When the record is duplicated by another record in the process, the record is skipped and nothing is done to the inventory.

With these changes, import reporting has also been updated to provide information regarding electronic portfolios deactivated during the import process.

## Technical Instructions

The following roles can create or edit the import profiles to utilize the new import capabilities provided:

- Catalog Administrator
- Cataloger

To use the new portfolio delete options provided:

- 1 Access the **Match Profile** tab for a Repository or Update Inventory import profile (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**) for creating or editing an import profile.
- 2 Select the **Allow bibliographic record deletion** option.

The screenshot shows the 'Import Profile Details' interface for a 'Repository' profile named 'Marc XML records'. The 'Match Profile' tab is selected and circled in red. Under 'Match Profile', the 'Serial match method' is 'Fuzzy Serial Match Method' and the 'Non Serial match method' is 'ISBN Match Method'. Under 'Match Actions', the 'Allow bibliographic record deletion' checkbox is checked and circled in red. Other options include 'Unlink records from community zone', 'Handling method' (Automatic), and 'Merge method' (Overlay all fields but local). Under 'Automatic Multi matches Handling', 'Disregard matches for CZ linked records' is unchecked. Under 'Unresolved Records', 'Skip and do not import' is unchecked. At the bottom, under 'No Match', 'Upon no match' is set to 'Import'.

Figure 54 - Allow Bibliographic Record Deletion Option

- 3 Select the **Inventory Information** tab.
- 4 Select the **Delete/deactivate portfolios when bibliographic record marked for delete** option.

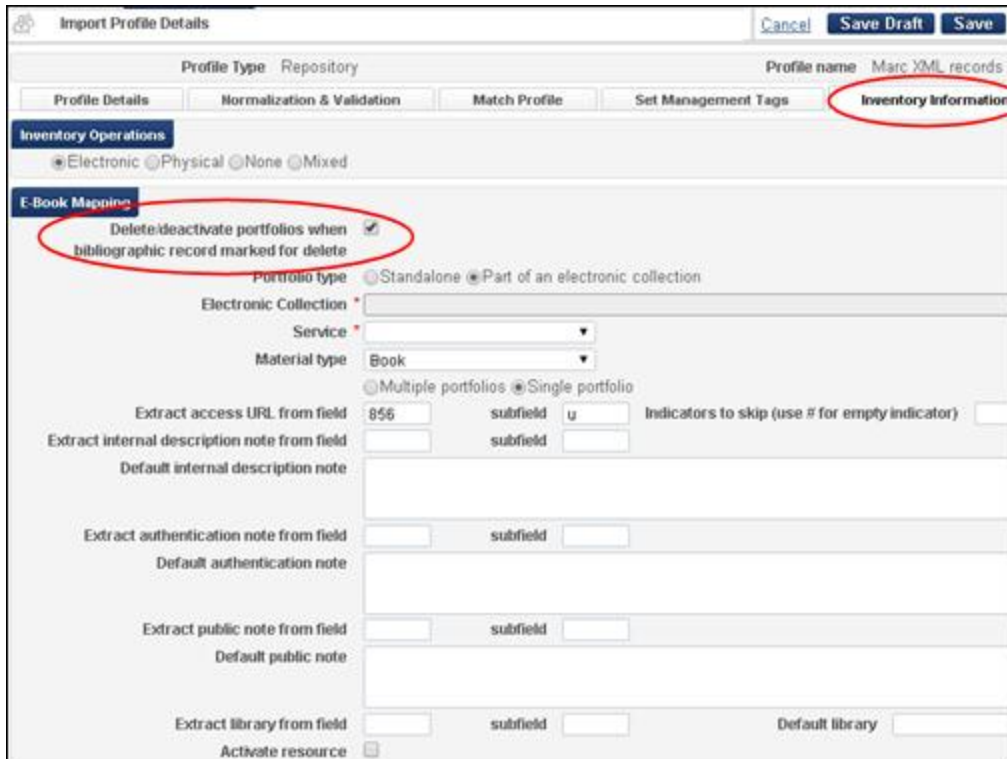


Figure 55 - Delete/Deactivate Portfolios When Bibliographic Record Marked for Delete Option

**Note:** This option is available to select only when you have selected the **Allow bibliographic record deletion** option in the Match Profile tab and when you choose the **Part of an electronic collection** portfolio type in the Inventory Information tab.

- 5 Click **Save** when you are finished.

## Improved Scheduling Display for Recurring Schedules

### Description

In several places in Alma, a scheduling feature is available where an activity can be scheduled to recur at a set time period—for example, every six hours. Now the option additionally displays the start time of the activity—for example, every six hours starting at 1:00 AM.

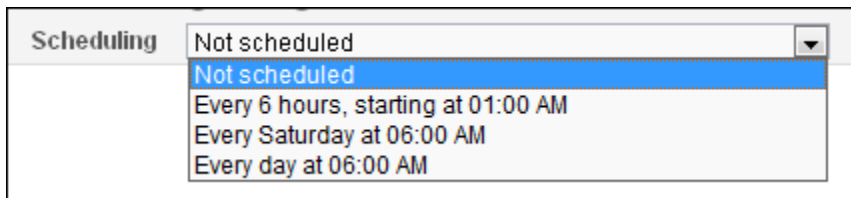


Figure 56 – Recurring Schedules

# Scheduling Options Added to Primo Publishing

## Description

When creating a publishing profile to publish bibliographic records to Primo, you now have three options for the occurrence of the every six hours scheduling. Additionally, the option now displays the start time of the activity—for example, every six hours starting at 1:00 AM.

## Technical Instructions

The following roles can access this enhancement:

- Cataloging Administrator
- General System Administrator

**To view the improved scheduling display for recurring schedules:**

- 1 Open the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**).
- 2 From the **Record Export** section, select **Publishing Profiles**.
- 3 Select **Actions > Edit** for the Publish bibliographic records to Primo profile.

The scheduling drop-down list displays the three options for the occurrence of the every six hours scheduling with the start time of the activity:

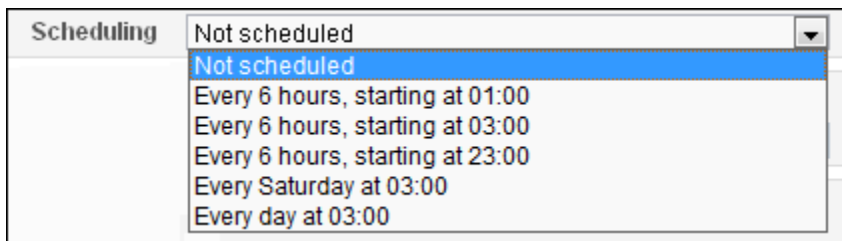


Figure 57 –Scheduling for Publishing to Primo

# Enhancements to List Pages with Multiple Select Option

## Description

Several enhancements have been made to the display of list pages that allow you to make multiple selections—for example, the Portfolio List page when adding portfolios to the CZ for electronic collections.

- The number of rows selected is displayed at the top of the list.
- The selected row is highlighted.
- The highlighted rows remain after a search is performed.

## Technical Details

The following roles can access this enhancement:

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

### To view the enhancements to the Portfolio List page:

- 1 From the Electronic Service Editor (**Repository Search for Electronic Collection > Edit Service > Portfolios Tab**), click **Add Portfolios from Community**. The Portfolios List is displayed:

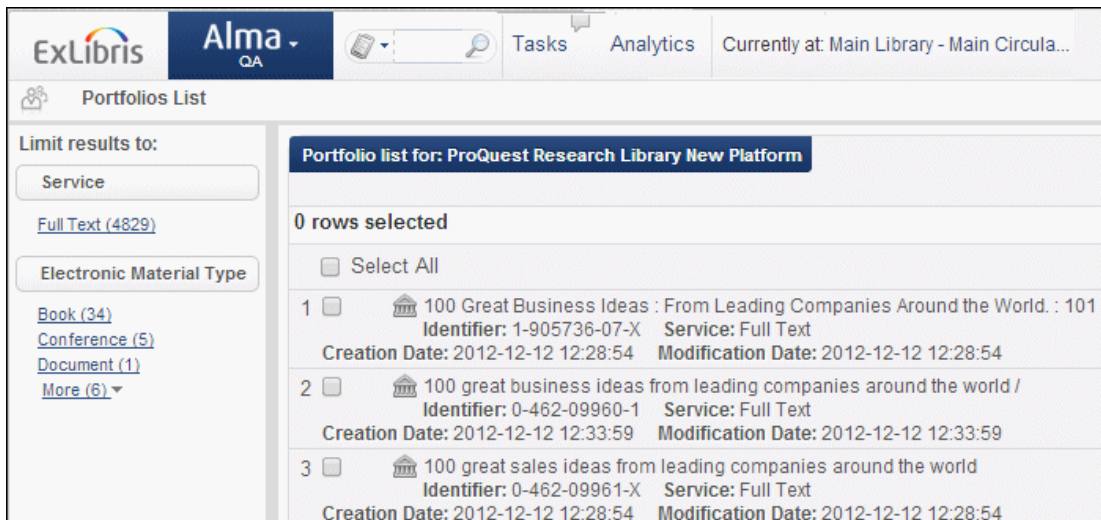


Figure 58 – Portfolios List

- 2 Select portfolios. The selected row is highlighted and the number of rows selected is updated.

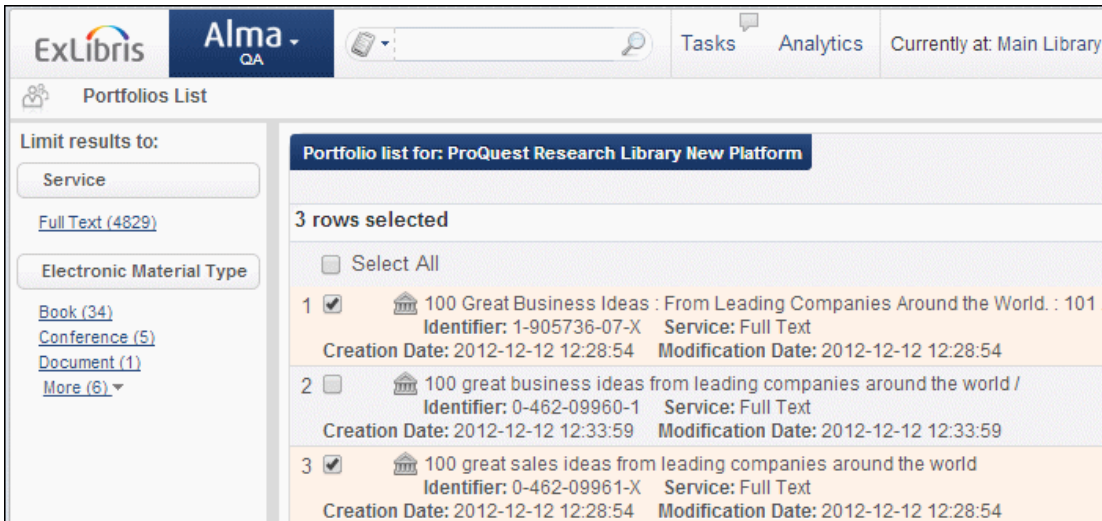


Figure 59 –Selected Portfolios

- 3 Enter a search term in the **Find** field and click **Go**. The highlighted rows are displayed in the results:

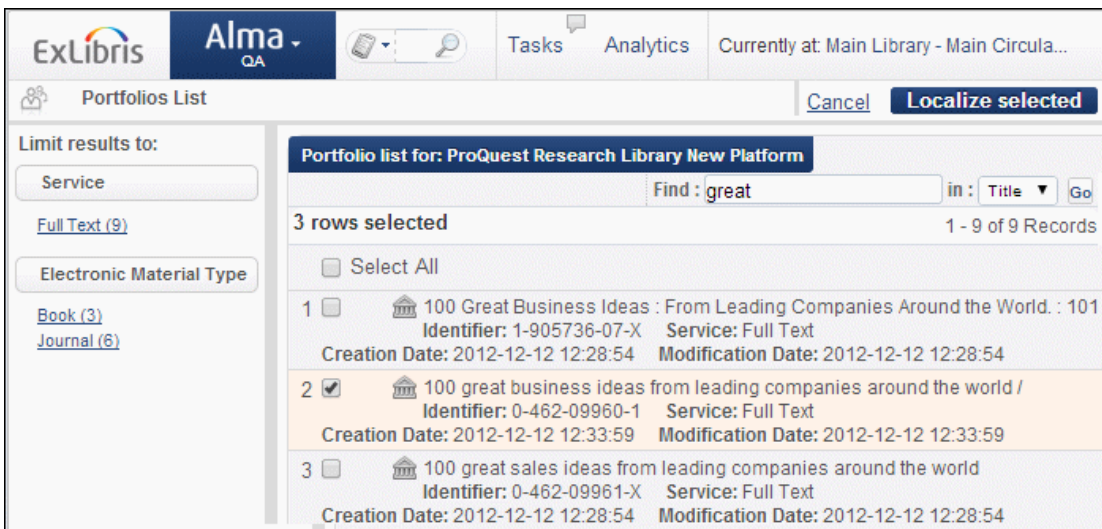


Figure 60 –Highlighting in Search Results

## Other Resource Management Enhancements

- The following links in the Alma main menu, located under **Resource Management > Import**, have been deprecated:
  - Handle Issue in Digital Deposit
  - Handle Issue in Digital File Upload

- A new report for import jobs is planned for the Alma June release. Until then, a **View Alternative Report** link to a draft of the new report is available on the import Job Report page (**Resource Management > Import > Monitor and View Imports**, and select **Actions > Report** for a specific import job).
- Previously, in certain cases, the algorithm for creating the OpenURL changed the **rft.genre=unknown** to **rft.genre=bookitem**, which resulted in no match being found for full text services with certain resource sharing partners that require the **rft.genre=unknown** as part of the OpenURL. This has been corrected to save/maintain the original genre (unknown) so that it can be used for general electronic services.
- On the Resolve Import Issues page (**Resource Management > Import > Resolve Import Issues > Matching**) or the Resolve Import Validation Errors page (**Resource Management > Import > Resolve Import Issues > Validation**), the buttons were changed to **Reject Records** with a tooltip of **Do not import records with issues in selected files**, and **Reject Entire File** with a tooltip of **Reject all records in selected files**.

# Fulfillment

The following sections describe the functions provided for the Fulfillment component in the April 2014 release of Alma.

## Specific Fine Payment for Patrons

### Description

This feature enables selecting specific patron fines/fees to pay. Previously, it was possible only to pay an amount of money which would then be applied to the patron's total balance, without regard to specific fines/fees.

Specific fines can also be paid using self-check machines and API.

### Technical Instructions

The following roles can select specific fines/fees for payment:

- Circulation Desk Manager
- Circulation Desk Operator

#### To select specific patron fines/fees for payment:

- 1 On the Patron Identification page (**Fulfillment > Checkout/Checkin > Manage Patron Services**), search for a patron in the **Scan patron's ID or search for patron** field and click **Go**. The Patron Services page opens for the specified patron.

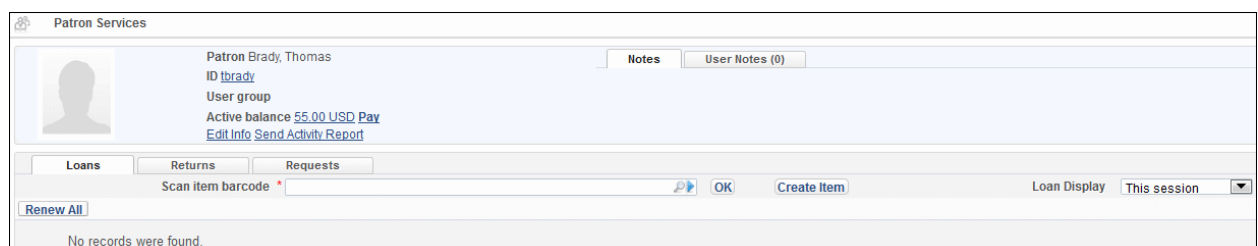


Figure 61 – Patron Services Page

- 2 Click **Pay** next to **Active balance**. The Payment Details dialog box opens.

Figure 62 – Patron Details Dialog Box

- 3 Underneath the Operator name, select **Specific fines**.
- 4 In the **Fines to pay** field, click the **Browse** icon to search for the fines you want to pay. The **User Fines and Fees** page opens.

	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Barcode	Original Amount	Remaining Balance
<input type="checkbox"/>	10/03/2014	Damaged item fine	Active	10/03/2014	-	Main Campus	-	-	20.00 USD	20.00 USD
<input type="checkbox"/>	10/03/2014	Card renewal	Active	10/03/2014	-	Main Campus	-	-	5.00 USD	5.00 USD
<input type="checkbox"/>	10/03/2014	Lost item replacement fee	Active	10/03/2014	-	Main Campus	-	-	30.00 USD	30.00 USD

Figure 63 – User Fines and Fees Page

- 5 Select the check boxes of the fines and fees that you want to pay and click **Select**. The Payment Details dialog box displays the balance of the selected items in the **User balance** field.

Figure 64 – Patron Details Dialog Box

- 6 In the **Payment method** field, select a payment method – **Cash**, **Credit Card**, or **Online**.

- 7 Select **Add change to balance** to indicate that when paying an amount greater than the balance, a credit is to be generated for the extra payment.
- 8 In the **Payment amount** field, enter the amount that you want to pay. By default, the entire balance of the selected fines displays in this field.
- 9 Optionally, enter a **Transaction ID** and a **Comment** in the relevant fields.
- 10 Click **Send** and then click **Confirm** in the Confirmation Message dialog box to pay for the selected fines. The Patron Services page opens, with the patron's active balance updated accordingly.

The screenshot shows the 'Patron Services' interface for a patron named Thomas Brady. The patron's active balance is highlighted in red and reads 'Active balance 20.00 USD Pay'. Below the balance, there are links for 'Edit Info' and 'Send Activity Report'. The interface also includes tabs for 'Loans', 'Returns', and 'Requests', a search bar for scanning item barcodes, and buttons for 'OK', 'Create Item', and 'Loan Display'. A 'Renew All' button is also visible. At the bottom, a message states 'No records were found.'

Figure 65 – Patron Services Page — Updated Active Balance

### To pay specific fines/fees using self-check machines:

If the self-check integration profile has been set up with the **Extended Fines and Fees** Extension Type, the **SIP2 Fee Paid** action can receive the following field pairs:

- **BZ** — Payment transaction number to attach to the payment action
- **EK** — Fee to be paid

### To pay specific fines/fees using a web service:

The **Pay User Fine/Fee Web Service** can be used to pay a user's specific fines/fees. Invoke the **Specific Fines/Fees to Pay** input parameter to list the fines/fees IDs, separated by commas, to indicate the specific fines and fees for payment.

## Manage Work Orders on the Item Edit Page

### Description

This feature enables managing work orders when editing an item. You can add and remove work orders when editing an item located in the repository.

## To manage work orders when editing an item:

- 1 Search for a physical item in the Repository (**Resource Management > Search and Sets > Repository Search**, select **Physical Items** in the **Find** box).
- 2 Click **Edit** for an item. The Physical Item Editor page's **General Information** tab opens.

The screenshot shows the 'Physical Item Editor' interface with the 'General Information' tab selected. The page title is 'Physical Item Editor'. Below the title, there is a 'Resource description' field containing '100 Years of American Folklore Studies: A Conceptual History Clements, William American Folklore Society 1988'. Below this, there are fields for 'Holding' (Main Library: 2203120535), 'Barcode' (000236676510000121), and 'Process type' (Acquisition). There are links for 'View all holdings' and 'View all items'. Below these fields are tabs for 'Summary', 'General Information', 'ENUM/CHRON information', 'Notes', and 'History'. The 'General Information' tab is active and contains several input fields: 'Barcode' (000236676510000121), 'Material type' (book), 'Inventory date', 'PO line' (POL-20122), 'Receiving date', 'Enumeration A', 'Chronology I', 'Description', 'Replacement cost', 'Process type', 'Copy ID', 'Item policy', 'Provenance' (Winter Display), 'Is Magnetic', 'Expected receiving date', 'Enumeration B', 'Chronology J', and 'Receiving operator'. There are 'Generate' and 'Clear' buttons. Below this is a section for 'Location Information' with fields for 'Permanent library' (Main Library), 'Permanent location' (2203120535), 'Alternative call number type', 'Inventory number', 'Pages', 'Alternative call number', 'Storage Location ID', and 'Pieces'. Below that is a section for 'Additional Information' with fields for 'Temporary Location Information', 'Item is in temporary location' (radio buttons for No and Yes), 'Temporary Library', 'Temporary call number type', 'Temporary item policy', 'Temporary location', 'Temporary call number', and 'Due Back Date'.

Figure 66 – Physical Item Editor Page — General Information Tab

- 3 In the **Process type** field, select a work order. The **At** field displays, where you select a work order department.

**Physical Item Editor**

Resource description [100 Years of American Folklore Studies: A Conceptual History Clements, William American Folklore Society 1988](#)

Holding [Main Library: 2203120535](#) [View all holdings](#)

Barcode 000236676510000121 [View all items](#)

Process type Acquisition

Summary General Information ENUM/CHRON information Notes History

Barcode 000236676510000121 Copy ID

Material type book Item policy

Inventory date PO line POL-20122 Provenance Winter Display

Receiving date Expected receiving date

Enumeration A Enumeration B

Chronology I Chronology J

Description

Replacement cost Receiving operator

Process type Binding At \* Main Bindery

**Location Information**

Permanent Location Information:

Permanent library \* Main Library Permanent location \* 2203120535

Alternative call number type Alternative call number

Inventory number Storage Location ID

Pages Pieces

**Additional Information**

Temporary Location Information:

Item is in temporary location  No  Yes

Temporary Library Temporary location

Temporary call number type Temporary call number

Temporary item policy Due Back Date

Figure 67 – Physical Item Editor Page — Process Type Field

- 4 Modify any other fields on the page as needed, and click **Save**. The item displays on the Repository Search page with an updated status of **Item not in place**, and the **Process type** and location (**At**) values are indicated accordingly.

Repository Search

The data for "100 Years of American Folklore Studies: A Conceptual History Clements, William American Folklore Society 1988" has been successfully updated

Find **Physical items** where **Keywords** contains **american history** **Go**

Institution Network Community

Limit results to:

Item Material Type

- book (3)
- journal (1)

Library

- COMP (1)
- Main Library (3)
- Resource Sharing Library (1)

Process Type

- Acquisition (1)
- In Process (1)
- Resource Sharing Request (1)
- Transit (1)

Primary Sort by Rank Secondary Sort by Rank

- 100 Years of American Folklore Studies: A Conceptual History**

Book By Clements, William (American Folklore Society 1988)

Update Date: 07/05/2012

Library: Main Library Permanent Location: General

Call Number Type: Library of Congress classification

Status: Item in place Barcode: 00023642496000121 Material Type: book

[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)
- 100 Years of American Folklore Studies: A Conceptual History**

Book By Clements, William (American Folklore Society 1988)

Update Date: 09/05/2012

Library: Main Library **Process type: Binding At: Main Bindery** Until: 13/03/2014 Permanent Location: 2203120535

Call Number Type: Library of Congress classification

Status: Item not in place Item Policy: Null Barcode: 000236676510000121 Material Type: book

[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)
- How the Beatles destroyed rock 'n' roll: an alternative history of American popular music / Elijah Wald.**

Book

Update Date: 16/01/2014

Library: Resource Sharing Library Process type: [Resource Sharing Request](#) Permanent Location: Borrowing Resource Sharing Requests

Call Number Type: Library of Congress classification

Status: Item not in place Barcode: [DB31701](#) Material Type: book

[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

Figure 68 – Repository Search Page — Work Order Type Displayed

5 Click **More info** to open the More Info pop-up window.

<b>Title</b>	100 Years of American Folklore Studies: A Conceptual History
<b>Related Records</b>	No Related Records
<b>Orders</b>	<a href="#">1</a>
<b>Requests/Work orders</b>	<a href="#">1</a>
<b>Number of loans</b>	0
<b>Last Loan Date</b>	-
<b>Number of in-house uses</b>	0
<b>Last In house use date</b>	-
<b>Courses</b>	No Courses

Figure 69 – Repository Search Page — Work Order Type Displayed

6 Click the **Requests/Work Orders** link. The Resource Request Monitoring page opens, displaying the item with its work order information.

Resource Request Monitoring

Limit results to:

Type

- In Process (1)

Material Type

- book (1)
- book (1)

Workflow Step

- In Process (1)

- 100 Years of American Folklore Studies: A Conceptual History**

ID: 646067960000121 Queue: [1](#)

Material Type: book Pickup Location: Main Bindery Request Date: 11/03/2014

Barcode: 000236676510000121

**Managed By Department: Main Bindery**

Workflow Step: In Process Process Status: In Process Process Date: 11/03/2014 Expiration Date: 13/03/2014

Request Type: Binding

[View Audit Trail](#) | [Edit](#) | [Cancel](#) | [Update Expiry](#) | [Mark as Missing](#) | [Print Slip](#) | [View title in search](#)

Figure 70 – Resource Request Monitoring Page — Work Order Information

## To remove a work order from a physical item:

- 1 Search for a physical item in the Repository (**Resource Management > Search and Sets > Repository Search**, select **Physical Items** in the **Find** box).
- 2 Click **Edit** for an item in a Work Order department. The Physical Item Editor page's **General Information** tab opens.

Physical Item Editor

Resource description [100 Years of American Folklore Studies: A Conceptual History Clements, William American Folklore Society 1988](#)

Holding [Main Library: 2203120535](#) [View all holdings](#)  
Barcode 000236676510000121 [View all items](#)

Process type Acquisition

Summary General Information ENUM/CHRON information Notes History

Barcode 000236676510000121 Copy ID  
Material type book Item policy  
Inventory date PO line POL-20122 Provenance Winter Display  
Receiving date Expected receiving date  
Enumeration A Enumeration B  
Chronology I Chronology J  
Description [Generate](#) [Clear](#)  
Replacement cost Receiving operator  
**Process type** Binding **At** \* Main Bindery

Location Information

Permanent Location Information:  
Permanent library \* Main Library Permanent location \* 2203120535  
Alternative call number type Alternative call number  
Inventory number Storage Location ID  
Pages Pieces

Additional Information

Temporary Location Information:  
Item is in temporary location  No  Yes  
Temporary Library Temporary location  
Temporary call number type Temporary call number  
Temporary item policy Due Back Date

Figure 71 – Physical Item Editor Page

- 3 Clear the value in the **Process type** field so that the field is empty.
- 4 Click **Save**. The item displays on the Repository Search page with the status **Item in place**.

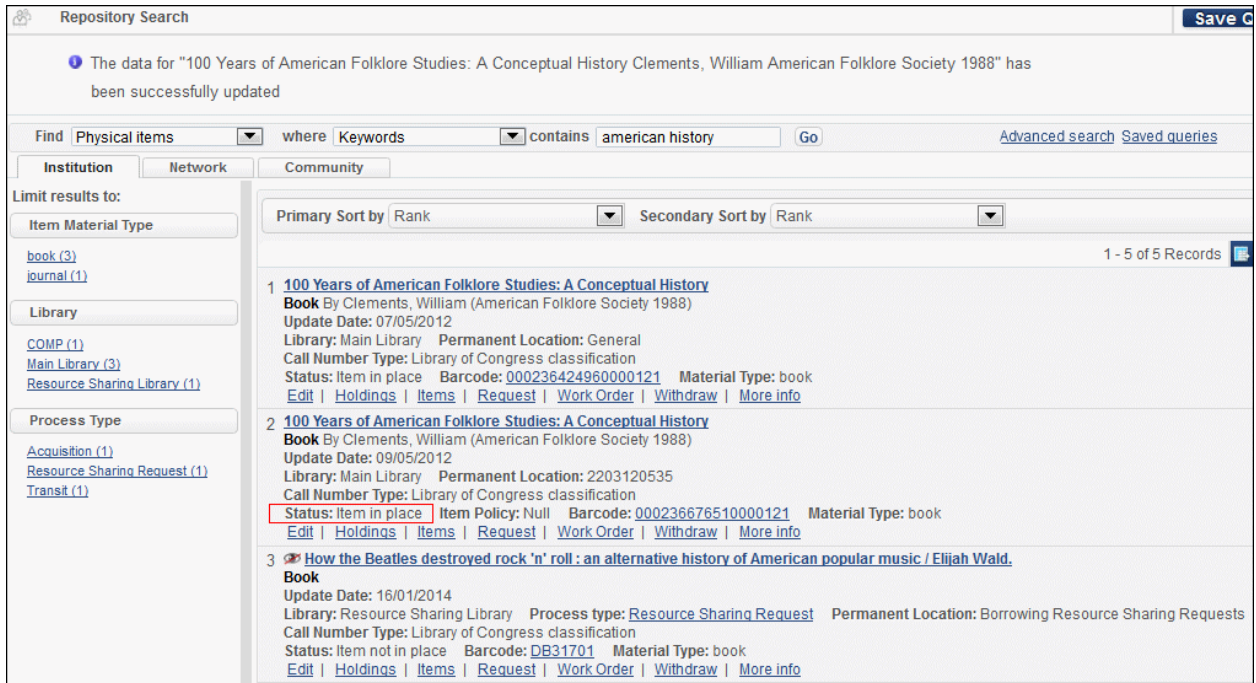


Figure 72 – Repository Search Page — Item in Place

## Additional Notices Sent Using SMS

### Description

This feature enables sending the following two new types of courtesy notices using SMS:

- Courtesy Letter – Indicates that the due date for the loan is approaching
- Overdue Notice Letter – Indicates that the loan is overdue

These are in addition to the existing option of sending hold shelf notifications via SMS.

SMS Courtesy Notices are sent as part of the following jobs:

- Notifications – Send Courtesy Notices and Handle Loan Renewals
- Notifications – Send Due Date Reminders

SMS courtesy notices are sent using an S/FTP connection. You must perform the following prerequisite tasks to enable sending SMS courtesy notices:

- Create an S/FTP connection – See the **Configuring S/FTP Definitions** section in the *Alma Administration Guide* or online help.
- Configure an SMS communication integration profile to enable using the configured S/FTP connection – See the **Configuring Integration Profiles** section in the *Alma Administration Guide* or online help.

## Technical Instructions

Before sending an SMS message using an Alma process, you must enable the message types. You can also customize the content of SMS messages.

### To enable SMS letters to be included in an Alma process:

On the LetterActivity Mapping Table page (**Administration > General Configuration > Configuration Menu > General Configuration > Letter Activity**) click **Customize** and then click the check mark in the **Enabled** column. A yellow check mark indicates that the letter is enabled.

✓	SystemJobLetter	EMAIL	-	-	Customize
✓	TrialLetter	EMAIL	-	-	Customize
✓	UserDeletionLetter	EMAIL	-	-	Customize
✓	UserRegistrationLetter	EMAIL	-	-	Customize
✓	FulPlaceOnHoldShelfLetter	SMS	-	-	Customize
✓	FulUserLoansCourtesyLetter	SMS	-	-	Customize
✓	FulUserOverdueNoticeLetter	SMS	-	-	Customize
✓	InvoicePaymentLetter	SUBMISSION	-	-	Customize

Figure 73 – LetterActivity Mapping Table Page —Enabled SMS Messages

### To customize the content of an SMS message:

- 1 On the Configuration Files page (**Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**), locate the **SMS Fulfillment User Overdue Notice Letter** and **SMS Fulfillment Loans Courtesy Letter** entries.

Customized	Enabled	Filename	Description	Updated by	Update Date	Actions
✓	✓	./xsl/letters/sms/SmsFulUserOverdueNo...	Sms Ful User Overdue Notice Letter	-	-	Customize
✓	✓	./xsl/letters/sms/SmsFulUserLoansCour...	Sms Ful User Loans Courtesy Letter	-	-	Customize
✓	✓	./xsl/letters/sms/SmsFulPlaceOnHoldSh...	Sms Ful Place On Hold Shelf Letter	admin1	13/08/2013	Actions
✓	✓	./xsl/letters/call_template/style.xsl	Style Letter XSL	-	-	Customize
✓	✓	./xsl/letters/call_template/smsRecord...	sms record Title xsl	-	-	Customize
✓	✓	./xsl/letters/call_template/senderRec...	Sender Receiver Letter XSL	-	-	Customize
✓	✓	./xsl/letters/call_template/recordTit...	record Title xsl	-	-	Customize
✓	✓	./xsl/letters/call_template/mailReaso...	Mail Reason Letter XSL	-	-	Customize
✓	✓	./xsl/letters/call_template/header.xsl	header Letter XSL	exl_support	11/03/2014	Actions

Figure 74 – Configuration Files Page — SMS Messages

**Note:** The **SMS Fulfillment Place on Hold Shelf Letter** is a legacy SMS message which can also be customized.

- 2 Click **Customize** for the relevant letter. The Configuration File page displays the parameters and contents of the SMS message.

Configuration File

Filename:

File Key:

Description:

Updated by: -

Update Date: -

Enabled:

Content:

```

<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:include href="smsRecordTitle.xsl" />
<xsl:template match="/">

<xsl:value-of select="notification_data/receivers/receiver/user_phone/phone"/> : <xsl:value-of
select="notification_data/organization_unit/name"/>.
@@@hi@@@ <xsl:value-of select="notification_data/user_for_printing/name"/>,
@@@youHave@@@ <xsl:value-of select="count(notification_data/item_loans/item_loan)" /> @@@overdueltems@@@.
@@@pleaseReturn@@@ @@@login@@@.

</xsl:template>
</xsl:stylesheet>

```

Figure 75 – Configuration File Page — SMS Messages

**Note:** The XML used for generating the SMS messages is identical to that used for generating courtesy and overdue email notifications. Relate to their structure and content if configuring the XSL templates.

- 3 Enter any text you want included in the SMS message in the relevant place in the **Content** field.
- 4 You can modify the **Description** as needed, and ensure that **Yes** is selected in the **Enabled** field to enable the message to be sent when running the relevant process.
- 5 Click **Customize**. The Configuration Files page opens, and the check marks displayed in the **Customized** and **Enabled** columns indicate that the message has been customized and enabled.

Customized	Enabled	Filename	Description	Updated by	Update Date	Actions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	..\xsl\letters\sms\SmsFulUserOverdueNo...	Sms Ful User Overdue Notice Letter	exl_support	11/03/2014	Actions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	..\xsl\letters\sms\SmsFulUserLoansCour...	Sms Ful User Loans Courtesy Letter	-	-	Customize
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	..\xsl\letters\sms\SmsFulPlaceOnHoldSh...	Sms Ful Place On Hold Shelf Letter	admin1	13/08/2013	Actions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	..\xsl\letters\call_template\style.xsl	Style Letter XSL	-	-	Customize

Figure 76 – Configuration Files Page — Customized and Enabled SMS Message

The relevant SMS is sent with the job that runs, provided that the SMS message has been customized and enabled accordingly (see above). The messages are sent as follows:

- The **Notifications – Send Courtesy Notices and Handle Loan Renewals** job sends the **FullUserLoansCourtesyLetter** SMS.
- The **Notifications – Send Due Date Reminders** job sends the **FullUserOverdueNoticeLetter** SMS.

# Defining a Circulation Desk as a Work Order Department

## Description

The purpose of this enhancement is to enable defining a circulation desk as a work order department. The circulation desk serves as a work order department for the work orders you assign to the circulation desk.

You can also select a work order type when scanning an item into Alma to indicate that you want to invoke a work order on the item you are scanning.

## Technical Instructions

The following roles can define a circulation desk as a work order department:

- General System Administrator
- Fulfillment Administrator

### To define a circulation desk as a work order department:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration**), select a library in the **You are configuring:** filter to enable configuring a circulation desk.
- 2 On the Circulation Desks List page (**Fulfillment > Fulfillment Configuration > Library > Circulation Desks**), select **Actions > Edit** for a circulation desk and click the **Work order types** tab. The Circulation Desk — Work Order Types page opens.

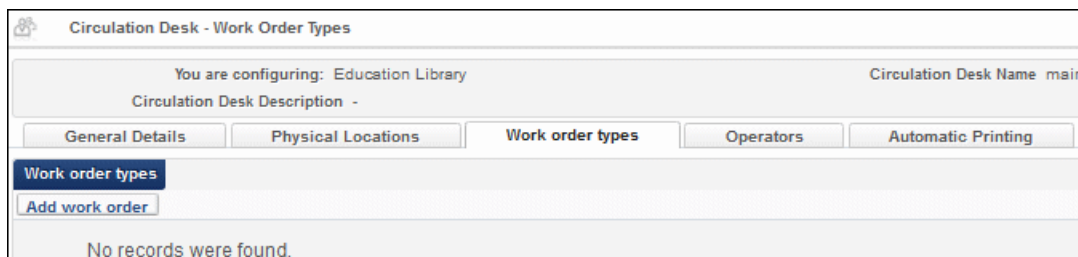


Figure 77 – Circulation Desk — Work Order Types Page

- 3 Click **Add Work Order**. The **Add Work Order** dialog box opens.

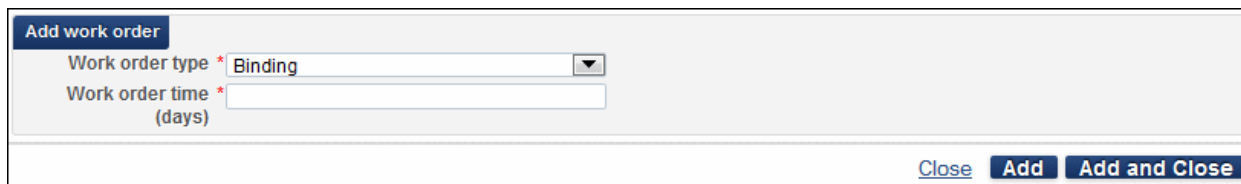


Figure 78 – Add Work Order Dialog Box

- 4 In the **Work order type** field, select a work order type which you want to be handled by the circulation desk.
- 5 In the **Work order time (days)** field, enter the number of days which you want the work order to be handled by the circulation desk.
- 6 Click **Add** to add the work order and enable adding another work order, or click **Add and Close** to add the work order and return to the Circulation Desk – Work Order Types page.

Figure 79 – Circulation Desk – Work Order Types Page

- 7 Click **Save**. The circulation desk serves as a work order department for the indicated work order types.

The circulation desk is also listed as a work order department on the Department List page, (**Administration > General Configuration > Configuration Menu > Work Orders and Departments > Work Order Departments**), with a yellow check mark in the **Owned by Circulation Desk** column:

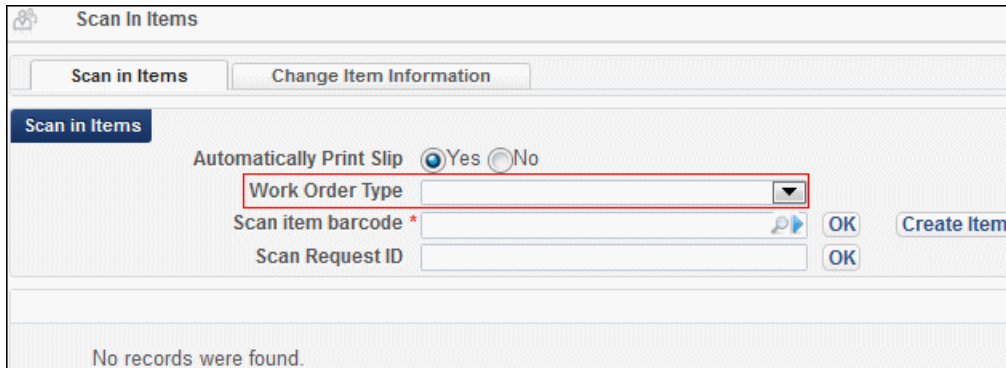
Code	Name	Description	Department Type	Owner	Owned by Circulation Desk
Digital	Digital	-	DIG	Main Campus	
main	main	-	0102120347	Education Library	✓
MainLibAcqDept	Main Library acquisitions	Main Library acquisitions Dept.	MainLibAcq	Main Campus	✓
natan	natan	-	natan	Institution	✓
123	new department	-	0102120347	Main Campus	✓
22345	new department	-	0102120347	Main Campus	✓
RR1	Reading Room 1	-	0102120347	Education Library	✓
test	test	test	E-ACTV	Main Campus	✓
1234	test	testttt	0102120347	Main Campus	✓
BIND1	Test Bindery	-	BIND	Main Campus	✓
AcqDeptUEDUC	UEDUC Receiving Department	-	AcqWorkOrder	110.121.5867240000121	✓
withd	Withdrawal	-	a100	Main Campus	✓
12345	x	-	0102120347	Main Campus	✓
xx	xx	-	0103120435	Main Campus	✓

Figure 80 – Department List Page

### To specify a work order type when scanning an item into Alma:

- 1 Ensure that you select a circulation desk that is associated with work orders in the **Currently at:** field at the top of the page.

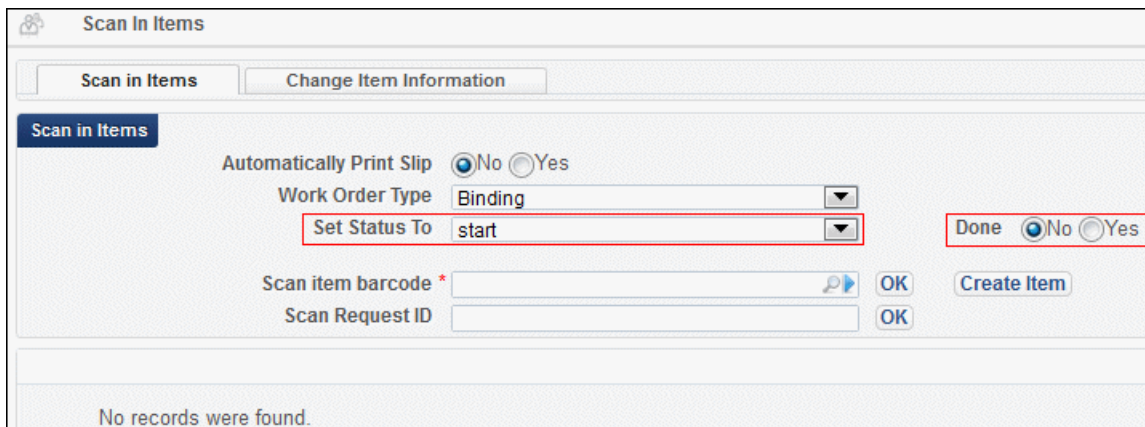
- 2 Open the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**). The **Work Order Type** field displays on the page.



The screenshot shows the 'Scan In Items' page with a navigation bar at the top containing 'Scan in Items' and 'Change Item Information' tabs. Below the navigation bar is a 'Scan in Items' button. The main form area includes a radio button for 'Automatically Print Slip' with 'Yes' selected. The 'Work Order Type' dropdown menu is highlighted with a red box. Below it are input fields for 'Scan item barcode \*' and 'Scan Request ID', each with an 'OK' button. A 'Create Item' button is also present. At the bottom of the page, it says 'No records were found.'

Figure 81 – Scan In Items Page — Work Order Type Field

- 3 Select a work order type in the **Work Order Type** field. The **Set Status To** and **Done** fields appear.



The screenshot shows the 'Scan In Items' page with the 'Work Order Type' dropdown menu set to 'Binding'. The 'Set Status To' dropdown menu is highlighted with a red box and set to 'start'. The 'Done' radio button is also highlighted with a red box and set to 'No'. The 'Automatically Print Slip' radio button is now set to 'No'. The 'Scan item barcode \*' and 'Scan Request ID' fields are empty. The 'Create Item' button is still present. At the bottom of the page, it says 'No records were found.'

Figure 82 – Scan In Items Page — Work Order Type Field

- 4 In the **Set Status To** field, select a status for the work order type.
- 5 In the **Done** field, select whether the work order is complete.
- 6 In the **Scan item barcode** field, scan the item's barcode and click **OK**. The item displays in the table at the bottom of the page, is assigned the requested work order type and labeled as managed by the circulation desk.

Scan In Items Exit Manage Items In Process

Scan In Items    Change Item Information

Scan In Items

Automatically Print Slip     No     Yes

Work Order Type    Binding

Set Status To    start

Done     No     Yes

Scan Item barcode \*        OK    Create Item

Scan Request ID        OK

Tools

Activated	Title	Destination	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In	Actions
<input checked="" type="checkbox"/>	<a href="#">100 Years of American Folklore Studies: A Conceptual History</a>	Manage Locally	Binding	-	-	1	<input checked="" type="checkbox"/>	Actions

Clear List

Figure 83 – Scan In Items Page

## Other Fulfillment Enhancements

- The Daily Report option (**Fulfillment > Checkout/Checkin > Daily Report**) is no longer available.

# Resource Sharing

The following sections describe the functions provided for Resource Sharing in the April 2014 release of Alma.

## Anonymize Resource Sharing Borrowing Requests

### Description

This feature enables hiding user information in non-active resource sharing borrowing requests. When you select the relevant Fulfillment Configuration setting and run the **Fulfillment – Handle Historical Archiving** job, the user information in non-active resource sharing borrowing requests is hidden.

---

**Note:** The **Fulfillment – Handle Historical Archiving** job was previously called **Loans – Handle Historical Archiving**. The job now includes anonymizing resource sharing borrowing requests, in addition to its original functionality of anonymizing item loans (when that functionality is selected in the configuration setting described below).

---

### Technical Instructions

The following roles can anonymize resource sharing borrowing requests:

- General System Administrator
- Fulfillment Administrator

**To configure the scheduling of anonymization of resource sharing borrowing requests:**

- 1 On the Fulfillment Jobs Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**), locate the **Anonymization Job** section and select **Anonymize Resource Sharing Requests**.

**Fulfillment Jobs Configuration**

**Borrowing Activity Report Job**  
 Status:  Active  Inactive  
 Schedule: Every day at 07:00 AM

**Send Courtesy Notices and Handle Loan Renewals Job**  
 Days before due date: 2  
 Loan renewal schedule: Every day at 03:00 AM

**Send Overdue Notices Job**  
 Overdue notice schedule: Every day at 02:00 AM

**Anonymization Job**  
 Anonymize item loans:   
 Anonymize resource sharing requests:   
 Schedule: Every day at 10:00 AM

**Figure 84 – Fulfillment Jobs Configuration Page – Anonymize Resource Sharing Requests Option**

2 Click **Save** to configure anonymization of resource sharing requests.

**To manually anonymize resource sharing borrowing requests:**

1 On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Scheduled** tab and select **Fulfillment** in the filter drop-down. The Fulfillment jobs display in the table.

**Monitor Jobs** De-Activate Selected

Scheduled

Filter: Fulfillment

Active	Name	Job Category	Creator	Schedule	Next Run	Actions
<input checked="" type="checkbox"/>	Requests - Handle Expiration Step	Fulfillment	-	Every day at 03:00 AM	03/19/2014 03:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Loans - Due Date Correction after Calendar Change	Fulfillment	-	-	-	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Notifications - Send Courtesy Notices and Handle Loan Renewals	Fulfillment	exl_support	Every day at 03:00 AM	03/19/2014 03:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Fulfillment - Handle Historical Archiving	Fulfillment	-	Every day at 10:00 AM	03/19/2014 10:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Notifications - Send Periodic Fulfillment Activity Report	Fulfillment	exl_support	Every day at 07:00 AM	03/19/2014 07:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Notifications - Send Due Date Reminders	Fulfillment	exl_support	Every day at 02:00 AM	03/19/2014 02:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Requests - Restore Temporarily Shelved Items	Fulfillment	saas_admin	-	-	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Requests - Recalculate after Inventory Update	Fulfillment	-	Every day at 12:00 PM	03/19/2014 12:00:00 PM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Loans - Change to Lost	Fulfillment	-	Every day at 07:00 PM	03/18/2014 07:00:00 PM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Activate/Deactivate Courses	Fulfillment	-	Every Saturday at 04:00 AM	03/22/2014 04:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Activate/Deactivate Courses	Fulfillment	-	Every day at 04:00 AM	03/19/2014 04:00:00 AM IST	<input type="button" value="Actions"/>
<input checked="" type="checkbox"/>	Users - Remove Demerits Blocks	Fulfillment	-	Every day at 04:00 AM	03/19/2014 04:00:00 AM IST	<input type="button" value="Actions"/>

**Figure 85 – Monitor Jobs Page – Fulfillment Jobs**

2 Locate the **Fulfillment – Handle Historical Archiving** job (ensure that it is active, indicated by a yellow check mark in the **Active** column) and select **Actions > Run Now**. A message displays at the top of the page, indicating that the job has been submitted.

**Monitor Jobs**

Scheduled

Filter: Fulfillment

**Figure 86 – Monitor Jobs Page – Job Submitted Successfully**

3 Click the **Completed** tab to verify that the job has completed successfully.

Name	Job Category	Creator	Submit Date	Start Date	End Date	Status	Failed Records	Actions
Fulfillment - Handle Historical Archiving	Fulfillment	exl_support	03/18/2014 03:53:05 PM IST	03/18/2014 03:53:05 PM IST	03/18/2014 03:53:05 PM IST	Completed Successfully		Actions
Metadata Import w/FTP-0104121212_auto	Import	System	03/18/2014 01:56:00 PM IST	03/18/2014 01:56:00 PM IST	03/18/2014 01:56:10 PM IST	Completed with Errors		Actions
Metadata Import w/FTP-0104121223_man	Import	System	03/18/2014 01:56:00 PM IST	03/18/2014 01:56:00 PM IST	03/18/2014 01:56:10 PM IST	Completed with Errors		Actions
Fulfillment - Handle Historical Archiving	Fulfillment	exl_support	03/18/2014 12:52:02 PM IST	03/18/2014 12:52:02 PM IST	03/18/2014 12:52:04 PM IST	Completed Successfully		Actions
Fulfillment - Handle Historical Archiving	Fulfillment	exl_support	03/18/2014 12:39:46 PM IST	03/18/2014 12:39:46 PM IST	03/18/2014 12:39:46 PM IST	Completed Successfully		Actions

Figure 87 – Monitor Jobs Page – Completed Tab

- Open the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**) and locate a non-active request (that is, a request with a status of Deleted, Rejected, Canceled, or Completed).

Resource Sharing Borrowing Requests

Limit results to:

- Active Partner
  - p (8)
  - partner1 name (16)
  - None (11)
- Creation Date
  - Older (33)
  - Today (1)
  - Up to a month ago (1)
- Update Date
  - Today (19)
- Requested Format
  - Physical (35)
- Supplied Format
  - Undefined (35)
- Due date
  - Undefined (35)
- Last Interest Date
  - Undefined (35)
- Need patron information
  - No (33)
  - Yes (2)

Search limited to: Status: Canceled by staff

1  [raisins](#)  
Book  
Request Status: Canceled by staff  
Pickup At: Resource Sharing Library  
Creation Date: 02/17/2014  
[Edit](#) | [Duplicate](#) | [Send query to patron](#)

2  3 Little Pigs  
Book By Mother Goose  
Request Status: Canceled by staff  
Pickup At: Main Library  
Creation Date: 02/25/2014  
[View](#) | [Remove](#) | [Duplicate](#) | [Send query to patron](#)

3  [Eilat](#)  
Book  
External Identifier: 57723540000121  
Partner: partner1 name  
Request Status: Canceled by staff  
Creation Date: 08/26/2012  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#)

4  [Japan & America.](#)  
Book  
Request Status: Canceled by staff  
Pickup At: Resource Sharing Library  
Creation Date: 04/04/2013  
[Edit](#) | [Duplicate](#) | [Send query to patron](#)

Figure 88 – Resource Sharing Borrowing Requests Page

- Click **Edit** for the request. The Resource Sharing Borrowing Request page opens, with the **Requester** field empty.

Resource Sharing Borrowing Request

General Information    Audit    Rota    Parameters    General Messages    Notes    Attachments

**Resource Information**

Title \* Japan & America.

Author

Author Initials

Edition

ISBN

Publisher

Publication Date

Place of Publication

Additional Person Name

Source

Series Title Number

Call Number

Note

Volume

Part

Chapter

Pages

---

**Request Attribute**

Title Japan & America.

Requester \*

Owner Resource Sharing Library

Request Status Cancelled by staff

Requested Format Physical

Allow Other Format

Preferred Send Method

Needed By

Delivery Location  Deliver to library  Alternative address

Pickup At \* Resource Sharing Library

Shipping Cost USD

Willing to Pay

Agree to Copyright terms \*

Needs patron information

Request Note

Figure 89 – Resource Sharing Borrowing Request Page — Empty Requester Field

## Configure a Resource Sharing Library for a Linked Account

### Description

This feature enables configuring the Resource Sharing Library to be referenced for an external user account that is linked with Alma.

## Technical Instructions

The following roles can configure a resource sharing library for a linked account:

- Circulation Desk Manager (logged into a circulation desk)
- Circulation Desk Operator (logged into a circulation desk)
- User or General Administrator (to configure walk-in patron account rules)

### To configure a resource sharing library for a linked account:

- 1 On the Linked Account Rules page (**Administration > User Management Configuration > Configuration Menu > Collaborative Networks > Linked Account Rules**, click **Add Rule**), select a rule to configure in the **Name** field.

The screenshot displays the 'Linked Account Rules' page. At the top, there is a 'Linked Account Rule Editor' section with fields for 'Name' (set to 'Linked Rule 1'), 'Description', 'Created By', and 'Updated By'. To the right, it shows 'Created On' and 'Updated On' as '03/18/2014'. Below this is the 'Input Parameters' section, which currently shows 'No records were found.' and includes dropdown menus for 'Name' and 'Operator', a 'Possible Values >' link, and an 'Add Parameter' button. The 'Output Parameters' section at the bottom contains several fields: 'User Group' (set to '03BC Master's'), 'Expiry Date', 'Expiry From Source', 'Purge Date', 'Purge After Expired', and 'Resource Sharing Library'.

Figure 90 – Linked Account Rules Page

- 2 Enter any other information in the fields in this section, as necessary.

In the **Resource Sharing Library** field, select a resource sharing library for the patron. The resource sharing library that is selected is automatically assigned to any new linked user that is created when a walk-in loan is performed.

- 3 Click **Save**. The rule displays on the Linked Account Rules page.

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Updated
			all	-	Implementor, Ex Libris	11/11/2014 10:00:00 AM
			Linked Rule 1	-	Support, Ex Libris	11/11/2014 10:00:00 AM

Default Rule  
[Default Linked Account rule](#)      Default rules for linked Account      [Edit](#)

Figure 91 – Linked Account Rules Page with Added Rule

## Other Resource Sharing Enhancements

- When viewing a patron’s fines and fees (**Administration > User Management > Find and Manage Users**, select **Actions > Edit** for a patron and click the **Fines/Fees** tab), the fines/fees display in descending order, with the most recently added fine/fee at the top of the table. Click the **Creation Date** column header to display the fines/fees in ascending order.
- When sending a resource sharing borrowing request whose **Profile Type=Email**, the email is sent in XSL format. The XSL used for formatting the email is **FulOutGoingEmailLetter.xsl** and is configurable on the Configuration Files page (**Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**).
- The option to configure resource sharing partners was moved from the Fulfillment Configuration menu to the Resource Sharing menu (**Fulfillment > Resource Sharing > Partners**).

The option to configure rota templates was moved from the Fulfillment Configuration menu to the Resource Sharing menu (**Fulfillment > Resource Sharing > Rota Templates**).

<a href="#">Back to Home Page</a>		
<b>ACQUISITIONS</b>	<b>RESOURCE MANAGEMENT</b>	<b>FULLFILLMENT</b>
<b>Purchase Order Lines</b>	<b>Search and Sets</b>	<b>Checkout/Checkin</b>
<a href="#">Search for PO Line</a>	<a href="#">Repository Search</a>	<a href="#">Manage Patron Services</a>
<a href="#">Order Without Inventory</a>	<a href="#">Manage Sets</a>	<a href="#">Return Items</a>
<a href="#">Review</a>	<a href="#">Manage Exports</a>	<b>Resource Requests</b>
<a href="#">Claim</a>	<a href="#">Top Level Collections</a>	<a href="#">Pick From Shelf</a>
<a href="#">Renew</a>	<b>Cataloging</b>	<a href="#">Scan In Items</a>
<a href="#">Review Deferred</a>	<a href="#">Search External Resources</a>	<a href="#">Expired Hold Shelf</a>
<a href="#">Manage Trials</a>	<a href="#">Browse Shelf Listing</a>	<a href="#">Active Hold Shelf</a>
<b>Purchase Order</b>	<a href="#">Open Metadata Editor</a>	<a href="#">Manage In Process Items</a>
<a href="#">Electronic Collection</a>	<b>Create Inventory</b>	<a href="#">Approve Digitization Requests</a>
<a href="#">Review</a>	<a href="#">Add Top Level Collection</a>	<a href="#">Monitor Requests &amp; Item Processes</a>
<a href="#">Approve</a>	<a href="#">Add Local Electronic Collection</a>	<b>Course Reserves</b>
<a href="#">Delete PO</a>	<a href="#">Add Local Portfolio</a>	<a href="#">Courses</a>
<b>Receiving and Invoicing</b>	<a href="#">Add Physical Item</a>	<a href="#">Reading Lists</a>
<a href="#">Search for Invoice</a>	<a href="#">Add Digital Representation</a>	<b>Resource Sharing</b>
<a href="#">Receive</a>	<b>Manage Inventory</b>	<a href="#">Lending Requests</a>
<a href="#">Create Invoice</a>	<a href="#">Community Zone Updates Task List</a>	<a href="#">Borrowing Requests</a>
<a href="#">Review</a>	<a href="#">Manage Electronic Resource Activation</a>	<a href="#">Partners</a>
<a href="#">Approve</a>	<a href="#">Network Harvesting Report List</a>	<a href="#">Rota Templates</a>
<a href="#">Waiting for Payment</a>		

Figure 92 – Resource Sharing Partners and Rota Templates Options

You must have the new Resource Sharing Partners Manager role to access these features. A Resource Sharing Partners Manager can configure these settings only in the institution/library in which they have their role (partners can be configured only on the institution level). Users who could previously access these features with the General System Administrator and Fulfillment Administrator roles have been automatically assigned the Resource Sharing Partners Manager role.

- The Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**) displays the following information for requests:
  - **Pickup at:** The library where the resource sharing item is to be picked up by the patron, configured in the **Pickup at** field on the Resource Sharing Borrowing Request page General Information tab.
  - **Notes:** Text entered in the **Request note** field on the Resource Sharing Borrowing Request page General Information tab.
  - **Creation date:** Date that the request was created.

# Administration and User Management

The following section describes the features provided for the Administration component in the April 2014 release of Alma.

## Creating User Sets

### Description

This feature enables creating and managing sets of users. User sets can be either logical or itemized. You can perform management activities on the users in the set.

User sets are managed on the Manage Sets page (**Administration > User Management > Manage Sets**), in the same way that PO line sets are managed in the Resource Management module (see **Managing Search Queries and Sets** section in the *Alma Resource Management Guide* or online help).

You can upload users to an itemized set by uploading a file that contains the user's identifiers. You can view the criteria by which can upload user lists into sets on the new User Identifier Types page. These codes are used when creating the file for upload.

### Technical Instructions

The following roles can create and manage user sets:

- User Manager
- User Administrator

#### To create user sets:

- 1 On the Manage Sets page (**Administration > User Management > Manage Sets**), select **Add Set > Itemized**. The Set Details page opens.

**Set Details**

Set name - Set type Itemized

**General Information**

Set name \*

Description

Note

Set content type \* User

Private  No  Yes

Status  Active  Inactive

Status date 03/24/2014 04:29:01 PM IST

Created by Ex Libris

Updated by Ex Libris

**Add Contents from File to Set**

File

**Figure 93 – Set Details Page**

- 2 Enter a **Set name** and **Description** in the relevant fields, as is done for all sets.
- 3 In the **Add Contents from File to Set** section, click the **Browse** icon to search for the file containing the user identifiers to be uploaded as a set.

**Note:** When uploading an Excel file, the **A1** cell must contain the type of identifier used in the file, and the ensuing cells of the **A** column must contain the user identifiers. Similarly, when uploading a .txt file, the first row must contain the type of identifier used in the file, and the ensuing rows must contain the user identifiers (each separated by a carriage return). For details on viewing the available user identifier types, see the following procedure.

- 4 Click **Upload and Validate File Content** to load the users in the file into your new set.

**Note:** If you want to upload a set of user names instead of user identifiers, enter the text **USER\_NAME** in the top row of your Excel/.txt file, and enter the actual user names in the ensuing cells/rows.

**To select the criteria by which to upload user sets:**

- 1 Open the User Identifier Type Code Table page (**Administration > User Management > User Identifier Types**). The table displays the User Identifier Codes.

**Code Table**

**Table Information**

Sub System USER\_MANAGEMENT Table Name User Identifier Type

Updated By ex\_support Updated on 31/07/2013

Patron Facing No

Table Description User Identifier Types

**User Identifier Types**

Filter: English

Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	01	Barcode	Barcode	<input type="radio"/>	ex_support	31/07/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	02	Student ID	Student ID	<input checked="" type="radio"/>	ex_impl	31/07/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	05	05	05	<input type="radio"/>	ex_support	31/07/2013

**Figure 94 – User Identifier Type Code Table Page**

- Note the **Code** value of the user identifier you want to use when uploading users. For example, in the above figure, if you want to list users by their **Student ID** in the file you are uploading, use **02** as the header in the upload file and list the users by their respective Student ID values.

## Updating User Sets

### Description

This feature enables updating parameters for a set of users. You select the parameters that you want to update for a user set, and run a process. The specified parameters are then updated for all users in the set.

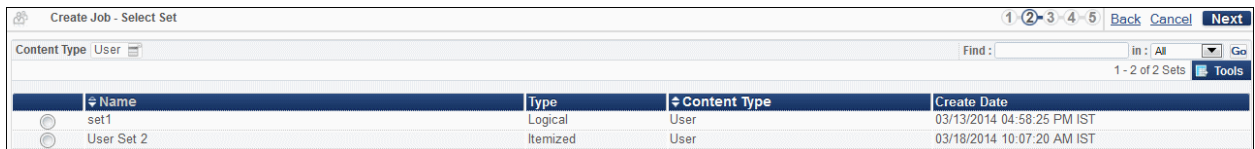
### Technical Instructions

The following roles can update user sets:

- User Manager
- User Administrator

#### To update user sets:

- On the Create Job — Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select the **Update User Information** job and click **Next**. The Create Job — Select Set page opens.



The screenshot shows a web interface titled "Create Job - Select Set". At the top, there are navigation buttons: "1", "2", "3", "4", "5", "Back", "Cancel", and "Next". Below this is a search bar with "Content Type: User" and a "Find:" field. A table lists two user sets:

Name	Type	Content Type	Create Date
set1	Logical	User	03/13/2014 04:58:25 PM IST
User Set 2	Itemized	User	03/18/2014 10:07:20 AM IST

**Figure 95 – Create Job – Select Set Page**

- Select the set that you want to update and click **Next**. The Create Job — Enter Task Parameters page opens.

Figure 96 – Create Job – Enter Task Parameters Page

- 3 Select the check boxes of the parameters you want to update, and enter the desired value and condition of each parameter, as necessary.
- 4 Click **Next**. The Create Job — Job Details and Schedule page opens.

Figure 97 – Create Job – Enter Task Parameters Page

- 5 Ensure that **As soon as possible** is selected (the only option on the page) to indicate that the job is to run as soon as possible. You can also modify the **Job name**, as needed.
- 6 Click **Next**. The Create Job — Review and Confirm page opens.

**Create Job - Review and Confirm**

**General Information**  
Job Name Update user information - set1 - 18/03/2014 10:32:50 AM IST

**Set Information**  
Set ID 97043670000521  
Name set1

**Scheduling**  
Schedule As soon as possible

**Task Parameters: Update user information**

Yes	Expiry date	31/03/2014	If field empty
No	Purge date	-	Unconditionally
No	Status	Active	Unconditionally
Yes	User group	Staff	Unconditionally
No	Campus		Unconditionally
No	Add block type	User is suspended	
No	Disable block type	User is suspended	
No	Add statistics (category)	-	
No	Remove statistics	-	
No	Add role	API Analytics Read	-
No	Remove role	API Analytics Read	-
No	Add note	-	Unconditionally
No	Job description	-	Unconditionally
Yes	Resource sharing library	Resource Sharing Library	Unconditionally
No	Set to external account		
No	Disable SMS		

Figure 98 – Create Job – Review and Confirm Page

**Note:** Activated parameters are indicated on this page by a **Yes** notation. Non-activated parameters are indicated by a **No** notation.

- Confirm your settings for the job. Click **Back** to go back to the previous pages and modify your settings, or click **Submit** to submit your settings and run the job. After clicking **Submit**, the Monitor Jobs page’s **Running** tab displays the job.

**Monitor Jobs**

Scheduled | SP Scheduled | **Running** | Completed

Filter : All | Find : | in : All

Refresh | 1 - 1 of 1 Processes

Name	Job Category	Creator	Submit Date	Start Date	Progress	Status
Update user information - set1 - 18/03/2014 10:32:50 AM IST	Users	ext_support	18/03/2014 11:03:00 AM IST	18/03/2014 11:03:00 AM IST	N/A	Initializing

Figure 99 – Monitor Jobs Page – Running Tab

- Click **Refresh**. When the job completes, it displays on the **Completed** tab.

Monitor Jobs							
Scheduled		SP Scheduled		Running		Completed	
Submit Date from		17/03/2014	to	18/03/2014	Apply Filter		
Filter : All				Find :		in : All	
Refresh		1 - 1 of 1 Processes					
Name	Job Category	Creator	Submit Date	Start Date	End Date	Status	Failed Record
<a href="#">Update user information - set1</a> - 18/03/2014 10:32:50 AM IST	Users	exl_support	18/03/2014 11:03:00 AM IST	18/03/2014 11:03:00 AM IST	18/03/2014 11:03:01 AM IST	Completed Successfully	

Figure 100 – Monitor Jobs Page – Completed Tab

## Removed Allowed Emails and Allowed S/FTP Connection Links

### Description

The **Allowed Emails** and **Allowed S/FTP Connections** links have been removed from the General Configuration menu (**Administration > General Configuration > Configuration Menu > External Systems**) for the production environment. The configuration remains available and active in the sandbox environment and on the Alma production environment (as of the May release) for customers who are still in the implementation/testing phase and are not yet configuration certified.

The purpose of these settings is to restrict the sending of emails and the sending of information via FTP connections to a limited group of allowed emails and FTP connections. This is necessary during testing to prevent the unintentional sending of emails and other information. After go-live, all emails and FTP connections are opened. The allowed emails and FTP connections settings are no longer necessary or relevant on the production environment and are therefore removed from view.

# Analytics

The following section describes the function provided for Analytics in the April 2014 release of Alma

## New Requests Subject Area

### Description

The new Requests subject area has been added to Alma Analytics. A resource request enters the Alma system by the requesting patron from a discovery interface, by the librarian on behalf of the requesting patron, or manually as a result of a staff-initiated request.

The following are examples of business questions that can be answered from the Requests subject area:

- How many items were requested per patron type?
- How many items were requested per material type?
- What is the fill rate for requests per material/patron type?
- How long does it take from the time that the request is placed until it is fulfilled?
- Which titles have the highest demand? (based on open requests)

---

#### Note:

Saving requests to history was deployed in the April release in Alma; therefore, the history of fulfilled requests is not yet available in Alma Analytics. It will be added to Alma Analytics for the May release (with data on historical requests starting from the April release date). The implication is that analyses such as Fill Rate and Average Request Time will be possible only from the May release.

---

### Technical Details

The Design Analytics role can access this enhancement.

#### To access the Requests subject area in Alma Analytics:

- 1 Access Alma Analytics (**Administration > Analytics > Design Analytics**).
- 2 Select **New > Analysis**.

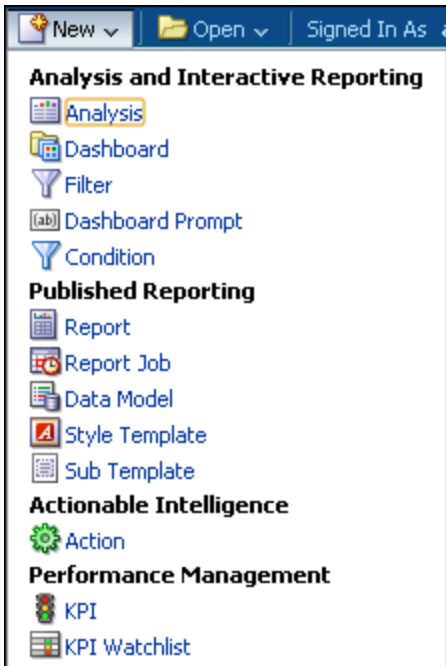


Figure 101 – New > Analysis Option

The Select Subject Area options are displayed.

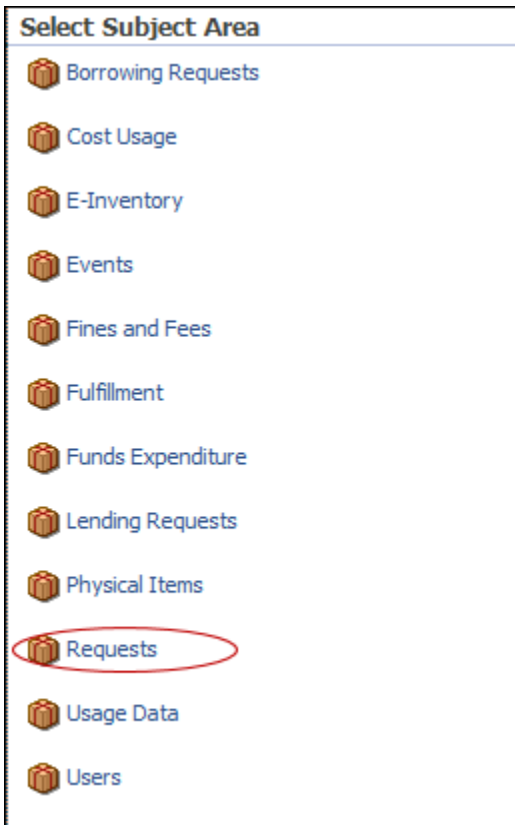
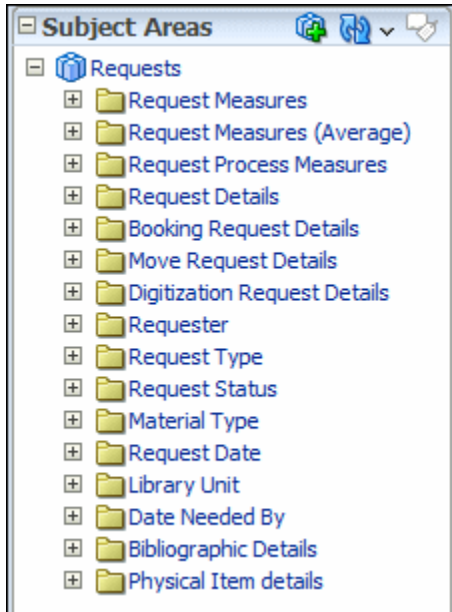


Figure 102 – Select Subject Area

### 3 Select **Requests**.

The following dimensions are available:



**Figure 103 – Requests Subject Area**

The requests measures are divided into the following folders:

- **Request Measures** – includes all measures that analyze request total times (for example, the time between the request being placed and the item becoming available)
- **Request Measures (average)** – includes an average calculation for all request measures (for example, the average time between the request being placed and the item becoming available.)
- **Request Process Measures** – includes all measures that analyze total duration for a specific request step (for example, Await Approval Time.)

The following measurement fields are available. (Each measure is available in both days and hours.):

Measurement Field	Description
Time to Available	The time between the request being placed and its becoming active.
Time to Process (library)	The time between the request becoming active and its being placed on the shelf for pickup.

Measurement Field	Description
Time to Patron Collection (patron)	<p>The time between the request being placed on the shelf for pickup and its being fulfilled.</p> <hr/> <p><b>Note:</b> Until the May release, no data will be calculated in this measure, since fulfilled requests are not currently available in Alma Analytics.</p> <hr/>
Total Request Time (Total)	<p>The total amount of time between the request being placed and its being fulfilled.</p> <hr/> <p><b>Note:</b> For open requests, Alma Analytics will calculate the total time until this date.</p> <hr/>
Await Approval Time	The total amount of time that the request was in the Await Approval step.
Deposit Item Time	The total amount of time that the request was in the Deposit Item step.
Digitize Item Time	The total amount of time that the request was in the Digitize Item step.
Document Delivery Time	The total amount of time that the request was in the Document Delivery step.
Hold Shelf Processing Time	The total amount of time that the request was in the Hold Shelf Processing step.
On Hold Shelf Time	The total amount of time that the request was in the On Hold Shelf step.
Pickup from Shelf Time	The total amount of time that the request was in the Pickup from Shelf step.
Transit Item Time	The total amount of time that the request was in the Transit Item step.
Waiting for Remote Storage Time	The total amount of time that the request was in the Waiting for Remote Storage step.
Work Order Department Time	The amount of time that the item was in the Work Order Department step.

## Out-of-the-Box Reports

There are two out-of-the-box-reports for the Requests subject area.

- **Heavily Requested Items** – Items that have been requested three or more times.

Request Date	Barcode	Title	Author	ISBN	Library Name	Number of requests
11/19/2012	11719010049320	Gesammelte Werke. Aus den Handschriften der Königlichen Bibliothek zu Hannover	Leibniz, Gottfried Wilhelm, Freiherr von, 1646-1716.		Memorial Library	3
	11719010382424	Narcissus and the invention of personal history /	Knoespel, Kenneth Jacob, 1947-	9780824067137; 0824067134	Memorial Library	3
		Nippur or Explorations and Adventures on the Euphrates	John Punnett Peters		Memorial Library	3
		The city staged : Jacobean comedy, 1603-1613 /	Leinwand, Theodore B.	9780299106706; 0299106705	Memorial Library	3
11/20/2012	11719027102245	Skunk Works : a personal memoir of my years at Lockheed /	Rich, Ben R.	9780316743303; 0316743305	None	3
		BILLY BUDD			Memorial Library	3
11/21/2012		Investment management regulation /	Frankel, Tamar.	1888215143; 9781888215144	Pappas Law Library	3
		Passion for God : theology in two voices /	Moltmann, Jürgen.	0664227031; 9780664227036	Theology Library	3
		The Greek New Testament : SBL edition /		9781589835351; 1589835352	Theology Library	3
11/23/2012	11719003077601	Seeing is forgetting the name of the thing one sees : a life of contemporary artist Robert Irwin /	Weschler, Lawrence.	9780520045958; 0520045955	None	3
	11719010235820	The Fihrist of al-Nadim : a tenth-century survey of Muslim culture /	Ibn al-Nadim, Muhammad ibn Ishâq, fl. 987.	23102925X	Memorial Library	3
11/24/2012	11719014671087	OVID METAMORPHOSES II			Memorial Library	3
	11719027934175	Outlaw journalist : the life and times of Hunter S. Thompson /	McKeen, William, 1954-	9780393061925; 0393061922	None	3
11/26/2012		ACADEMIA IN UPHEAVAL			Memorial Library	3
		YURO NO PIKUNIKKU			Memorial Library	3
					None	3

Figure 104 – Heavily Requested Items

- **Patron Physical Requests - Time to Hold Shelf** – This report displays the time between the hold request being made and the item being placed on the hold shelf.

Request Type	User Group	Material Type	Request Date Month	Pickup Location	Status Note	Time to Hold Shelf (Days)	# of requests
General hold request	Graduate School Student	None	April	Mugar Memorial Library	None	0	1
Move permanently		Book	December	Theology Library	None	0	1
			January	Alumni Medical Library	None	0	1
			August	Theology Library	None	0	1
Move temporarily		Book	April	Mugar Memorial Library	Cancelled at patron's request	4	1
			December	None	None	0	1
			February	Mugar Memorial Library	None	0	1
			January	Mugar Memorial Library	None	0	2
			March	Mugar Memorial Library	None	0	1
				Music Library	None	0	1
				Resource Sharing Library	None	0	1
			November	Resource Sharing Library	None	52	4
			October	Resource Sharing Library	None	123	6
			September	Mugar Memorial Library	None	0	1
				Resource Sharing Library	Booking request passed its release time	1	1
Mugar Technical Services		Book	April	Mugar Technical Services Department	None	0	1
					None	57	38
					Unknown	0	1
					None	0	1
			August	Mugar Technical Services Department	Cannot be fulfilled	0	1
					Items moved	0	1
				Theology Acquisition Department	Items moved	18	23
			December	Mugar Technical Services Department	Cannot be fulfilled	0	1
	Items moved	0	3				

Figure 105 – Patron Physical Requests - Time to Hold Shelf

# Alma APIs

The following sections describe Alma API enhancements provided in the April 2014 release.

## Alma RESTful APIs

With the April release, a new, lightweight user API is available. This API is essentially a parameter of the standard Get User API that enables you to retrieve a user's core information only.

For detailed information on the lightweight user API, see:

[http://support.exlibris.co.il/alma/restws/GET\\_users\\_user\\_id.wadl.html](http://support.exlibris.co.il/alma/restws/GET_users_user_id.wadl.html)

## Other API Enhancements

If a RESTful API call results in an HTTP 400 or HTTP 500 error, a tracking ID is now included both in the XML that is returned and in the log file.

For example:

```
<errorMessage>
The web server encountered an unexpected condition that prevented it from
fulfilling the request.
If the error persists please use this unique tracking ID when reporting
it: E8300-1702212625-MD9EQ-NFE854322435
</errorMessage>
```

# Collaborative Networks

The following section describes Alma enhancements provided for collaborative networks in the April 2014 release.

## Improvements to Deleting Bibliographic Records in the Network Zone (NZ)

### Description

With the April release, improvements have been made to the deletion of records in a collaborative network environment. If an NZ record has no inventory or PO line associated with it and none of the NZ record's linked Institution Zone (IZ) records has associated inventory or PO lines, the NZ record and all the linked IZ records can be deleted. The IZ records are deleted first and if this deletion completes successfully, the associated NZ record is then deleted.

# Alma Interface Updates

The following sections describe Alma interface update enhancements provided in the April 2014 release.

## Time Added to Attachments

### Description

When viewing attachments, the time at which the attachment is created is now included in the Attached On column.

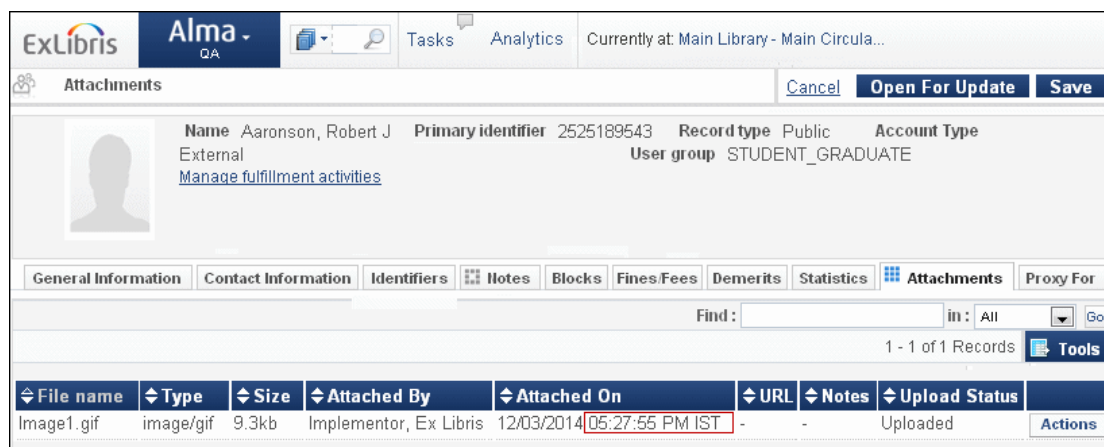
### Technical Details

In several places in Alma, you have the ability to add attachments. Previously, only the date appeared in the Attached On column. Now the time that the attachment is created appears as well.

#### For example:

- 1 On the Find and Manage Users page (**Administration > User Management > Find and Manage Users**), select **Actions > Edit** for a user.
- 2 Select the **Attachments** tab.

The attachment details are displayed with the date and time that the attachment is created in the Attached On column.



The screenshot shows the Alma interface for user management. The user profile for Robert J. Aaronson is displayed, including his name, primary identifier (2525189543), record type (Public), account type (External), and user group (STUDENT\_GRADUATE). Below the profile, there are tabs for various user information sections. The 'Attachments' tab is selected, showing a table of attachments. The table has columns for File name, Type, Size, Attached By, Attached On, URL, Notes, Upload Status, and Actions. The 'Attached On' column for the first attachment, 'Image1.gif', shows the date and time: '12/03/2014 05:27:55 PM IST', which is highlighted with a red box in the original image.

File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status	Actions
Image1.gif	image/gif	9.3kb	Implementor, Ex Libris	12/03/2014 05:27:55 PM IST	-	-	Uploaded	Actions

Figure 106 –Attached On – Time

# Jump to Page Feature

## Description

You can now jump to a specific page in the search results.



Figure 107 – Jump to Page

Enter a page number and click **Go** or press **ENTER** to jump to that page.

A tooltip indicates the total number of pages. (For extremely large numbers of results the total number of pages is only approximate.)

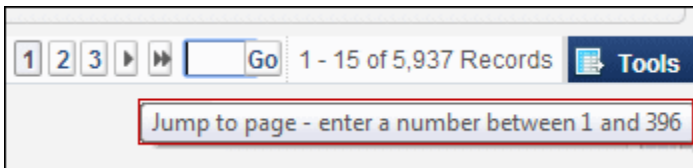


Figure 108 –Total Number of Pages

If you enter a number that is too high, a tooltip indicates that the page number is out of range.

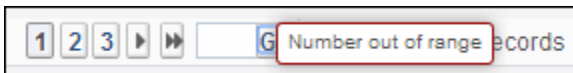


Figure 109 –Number Out of Range

# Known Issues

## Electronic Collections

- For the newly combined electronic collections that contain both services and bibliographic records/URLs, the Electronic Resource Activation Task List (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**) may exhibit faulty behavior:
  - Selecting **Un-suppress** from the **Actions** menu may result in the disappearance of the **Activate** item from the menu list.
  - Selecting **Done** from the **Actions** menu may result in unexpected behavior.
- The **Suppress/Unsuppress** option appears if the electronic collection has both an unsuppressed/suppressed bibliographic record and a URL associated with it. Selecting this option suppresses/unsuppresses the bibliographic record from being published to Primo. For the June release, the **Suppress/Unsuppress** option will appear regardless of whether a URL is associated with the electronic collection. In the meantime, if no URL is associated with the electronic collection, you can suppress/unsuppress it through the bibliographic record.

## Import Profiles

- 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.

## Fulfillment

- If a circulation desk has an Acquisition Technical Services work order department, staff users should be able to receive items at the circulation desk. However, currently the following error is issued when attempting to receive items at such a circulation desk: "No acquisition department was selected."

## Resource Sharing

- The **Rota Templates** link (**Fulfillment > Resource Sharing**) is visible to the Resource Sharing Partners Manager role in a library or an institution, as discussed in the Resource Sharing section of this document. An operator who is scoped for a specific library can view the institution-level templates in view mode, but should not be able to add templates. The **Add Template** button should therefore be disabled in view mode, but it is currently enabled.

## Analytics

- An issue was reported in Oracle's OBI relating to the version currently used by Ex Libris. The implication is that Alma Analytics will no longer function correctly for Chrome users upgrading to the latest version of Chrome (30).

For details, you can read the following:

[https://blogs.oracle.com/proactivesupportEPM/entry/obiee\\_problems\\_with\\_chrome\\_update](https://blogs.oracle.com/proactivesupportEPM/entry/obiee_problems_with_chrome_update)

[https://blogs.oracle.com/proactivesupportEPM/entry/update\\_to\\_obiee\\_chrome\\_30](https://blogs.oracle.com/proactivesupportEPM/entry/update_to_obiee_chrome_30)

Ex Libris is working on updating the OBI version in order to fix this issue. However, this will take time and the fix is expected only in Q2 2014 (still to be finalized). In the meantime, use other supported browsers.