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Table of Contents

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 August 2014 Release Highlights
- Data Services
- Alma What's New Videos
- Documentation Highlights
- Particular Issues to Note
- Feature/enhancement descriptions for the respective Alma functional areas
  - Acquisitions
  - Resource Management
  - Import Profiles
  - Fulfillment
  - Administration
  - Resource Sharing
  - Analytics
  - Alma APIs
  - Collaborative Networks and Multicampus Institutions
  - Alma Interface Updates
- Known Issues

Alma August 2014 Release Highlights

Acquisitions

- Release Remaining Encumbrances

  Alma now supports a new option related to releasing the remaining encumbrance on an invoice. Previously, the **Release remaining encumbrance** check box was not editable once the invoice was saved; with this release it will be available for editing when the invoice line is editable.

- Support Ability to Continually Recalculate Encumbrances

  A new job supports the ability to calculate exchange rates on encumbrances based on the current date rather than on the transaction date. Prior to this release, encumbrances used the exchange rates from date of the PO line or invoice creation date and the rate was not updated with the passage of time or adjustments in currency ratios. This new feature allows for amounts to be calculated to a current scale at any point during the transaction process.

Resource Management

- Call Number Mapping to Holdings Record

  Alma has added the Call Number mapping table to the Resource Configuration menu to allow customers to customize how the call numbers are mapped from bibliographic records to the holdings records.

- Enhancements to Portfolio Export and Portfolio Loader

  A number of enhancements have been made to the portfolio export of electronic collections, such as a new option to export CZ electronic collection portfolios, enabling libraries to compare collections managed in the CZ with vendor-provided subscription lists.

- Export Electronic Portfolios in KBART Format

  This new option allows for exporting electronic portfolios in the standard KBART format for the purpose of integration with external third parties that support the KBART standard.

- Export Tasks from CZ Updates Task List

  The Extended Export tool has been added to the Community Zone Updates Task List page to allow staff users to export the task list to an Excel file.

- Derive New Bibliographic Records from Existing Bibliographic Records

  There is a great new feature - Derive New Record - in the MARC21 Bibliographic menu of the MD Editor. Using the related bibliographic record and the default template as the basis, this tool allows catalogers to add a new record that includes either a Host Item (**773**) or Other Edition (**775**) field.

Import Profiles

- Configure Email Notifications for Import Profiles

  In all scheduled import profiles that are using the FTP file upload method, you can now specify the users and email addresses that will receive email notifications when the import has completed. It is also possible to choose whether to send the notifications for successful jobs and/or jobs that contain errors.

- Add Item-Level Attributes to Import Records

  Another great enhancement adds an advanced import option that allows for mapping additional physical item-level fields from the import records into Alma – for example, temporary location information, enumeration and chronology subfields, and notes subfields.

Fulfillment

- Campus Level Self-Ownership Check Option

  This feature enables disabling display logic rules (for resource sharing requests), general electronic services, and partner configuration for a title, based on a self-ownership check that is done at the campus with which the requesting patron is affiliated.

Administration

- Modifications to the Run a Job Wizard

  A **Source type** filter, which allows for filtering jobs has been added to the Run a Job wizard: **All** – All jobs are displayed; **System Defined** – Jobs created by Ex Libris and available out-of-the-box are displayed; **User Defined** – Jobs created by the customer are displayed.

- Type Added to User Statistics

  In user records, in addition to defining Category Types, it is now also possible to also define user record Statistic Types. Each statistic type can be mapped to a list of categories.

Analytics

- Fields Added to PO Line Dimension

  The Order Line Type, Reporting Code, Reporting Code Description, and Invoice Status have been added to the PO Line dimension in all subject areas in which it appears.

- Enhancements to Analytics Scheduling Options

  Two important enhancements were made to improve the report schedule capabilities. The report scheduling wizard was enhanced so that reports saved in any folder will be available for scheduling. Additionally, it is now possible to choose the report output of scheduled reports - PDF, Excel, and Text. (Previously only the PDF format was supported).

Collaborative Networks and Multicampus Institutions

- Central License Negotiation

  Alma now supports managing vendor license negotiations by the collaborative network central office on behalf of the collaborative network members. The negotiation is managed in the Network Zone (NZ), where the central office creates a license of the type Negotiation, which includes negotiation details, member name, member contact email, and more.

Alma Interface Updates

- Information Icons Added

  An information icon has been added to a number of pages in Alma. When clicking the icon, a pop-up opens displaying created by, last updated by, and (where applicable) modified by information.

Data Services

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

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period 6-July-2014 through 27-July-2014:

- French National Licenses - Brill
- French National Licenses Elsevier
- French National Licences Nature
- French National Licences Recueil Des Cours De L'Academie de la Haye
- Wiley Online Library Pilot 2014
- Institute of Physics - Expanding Physics
- Institute of Physics - Concise Physics
- Maruzen e-Book Library

New External Resources That Are Open for Searching

The following external resources will be available as of August 6th:

- Monash University of Malaysia
- Monash University South Africa
- National Library of Malaysia
- University of Malaya Library
- National University of Singapore Library
- Yale University Library
- Ohio Link
- BDZ Music Data MARC21 Cataloguing Service (BDS)
- BDZ DVD/BLURAY MARC21 Cataloguing Service (BDS)
- Curtin University Library
- University of Sydney

Alma What's New Videos

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

- Call Number Mapping to Holdings Record
- Add Item-Level Attributes to Import Records
- Export Electronic Portfolios in KBART Format
- Export Tasks from CZ Updates Task List
- Enhancements to Analytics Scheduling Options

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 July 2014 release:

- Shared Dimensions section in Analytics – This new section (under Analytics) describes the dimensions that are shared among the various subject areas. It includes a new table layout for Analytics fields as well as images that illustrate the connection between Alma fields and the corresponding Analytics fields. The same table layout is planned to be adopted for the various subject areas.
- Keyword Search Indexes – A section was added describing the fields searched when performing a keywords search (under Resource Management > Using the Repository Search > Search Indexes).

The above will be available with the update of the documentation on the 3rd of August.

Particular Issues to Note

The following issues should be noted:

- If your institution catalog is searchable by external applications via the Z39.50 protocol, ensure that you configure the appropriate Z39.50 client applications to work with your Alma institution. For detailed information (particularly on configuring the Refworks client), see the **Z39.50 Search** section in the *Alma Integrations with External Systems Guide* or Alma online help.
- The way in which records are determined to be locked, as well as the lock indication on records in repository search results, will be changing for the Alma September release. The **Locked by** indication on the search results page will no longer appear; rather, an indication of the record's being locked will be provided when you click to view/edit the record. By default, a record that was saved by another user within an hour of viewing/editing the record will be locked. This amount of time, however, will be configurable as of the September release.
- For the Alma September release, the **Disregard matches for bibliographic CZ linked records** option in the import profile's **Match Profile** tab (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Match Profiles**) will be removed. Instead, a customer parameter will be added, enabling you to determine whether Alma should disregard CZ records altogether when attempting to perform any type of match in the system (import profile, OCLC, relink). Note that if this parameter is set to **True** (that is, Alma disregards CZ records for any matching in the system), the **Unlink bibliographic records from Community Zone** option in the Match Profile tab will not be available. The details of this enhancement will be provided in the Alma September release notes.
- Ensure that you do not work with Alma or Alma and Primo in two browser tabs or in two windows of the same browser. Instead, open another instance of Alma or Primo in another browser.

Acquisitions

The following section describes the features provided for the Acquisitions functional area in the August 2014 release of Alma.

User Contact Information Card on Work Order List

Description

This improvement is part of a system-wide implementation of linkable contacts in the Alma interface.

On the Receiving Department Items > Items in Department page, the **Modified By** column should contain a link to the modifier's contact information card, as shown below.

The contact's information appears in a pop-up when you click the card icon.

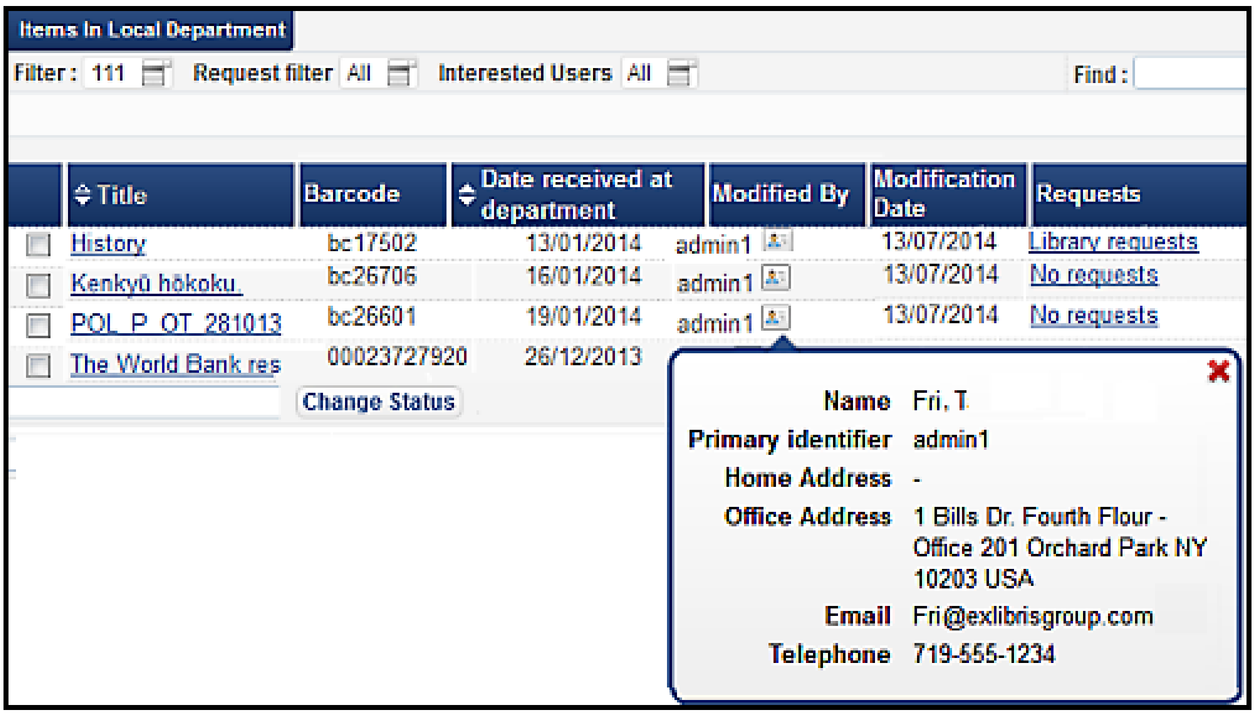


Figure 1 – Contact Information Pop-up with Email Link

Release Remaining Encumbrances

Description

A remaining encumbrance in a fund occurs when the price of the PO line (the encumbered amount) is greater than the total invoice line amount (the expended amount).

Alma supports releasing the remaining encumbrances for continuous PO lines by selecting the **Release remaining encumbrance** check box on the invoice line.

Until now, the **Release remaining encumbrance** check box was not editable after the invoice was saved. With this release, it will be available for editing whenever the invoice line is editable.

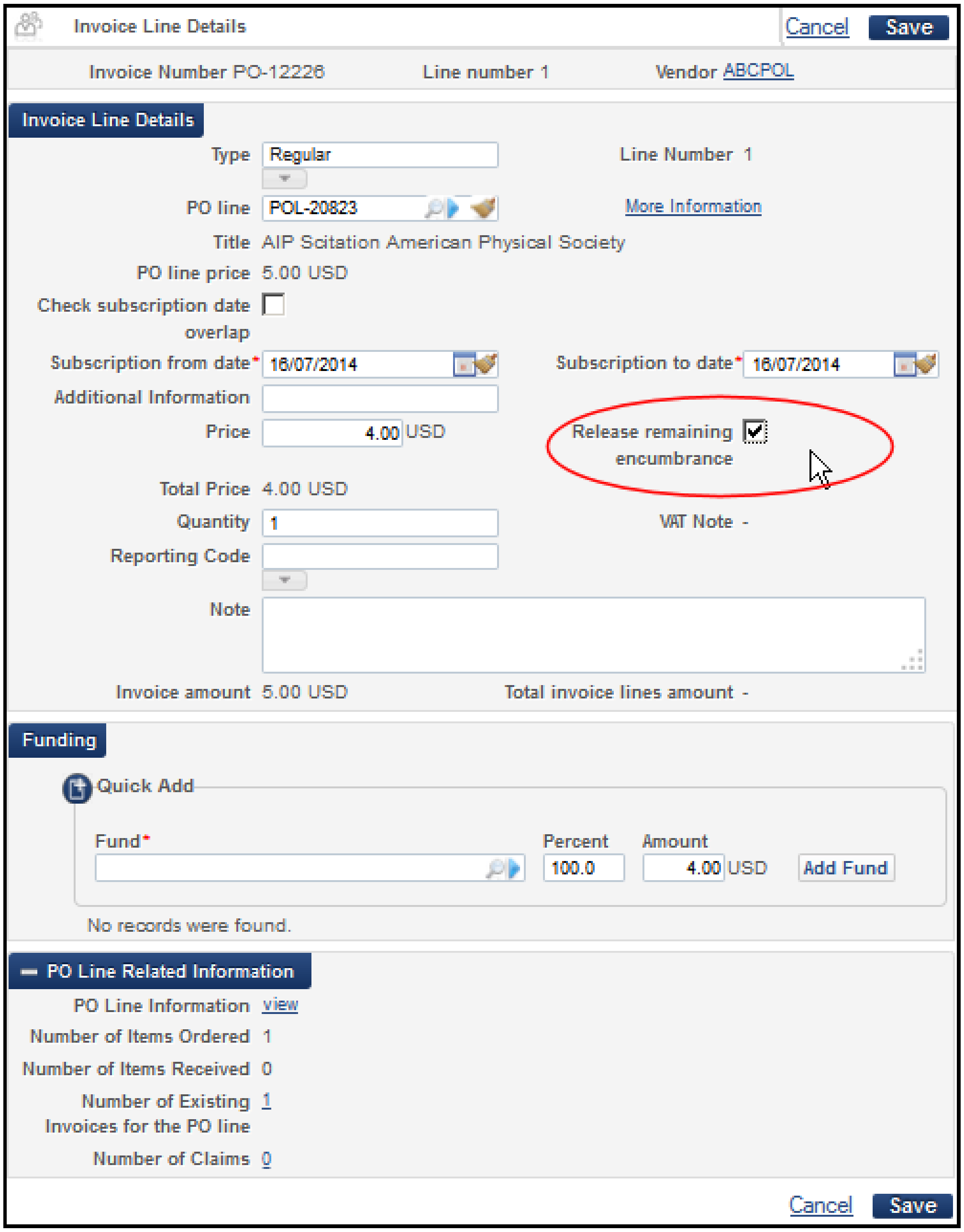


Figure 2 - Release Remaining Encumbrance

In addition, a new check box has been added to the existing job, Recalculate PO Lines Encumbrance. This check box allows the user to release any remaining encumbrances on continuous and standing order PO lines that, as a result of the recalculating job, now meet the criteria of the Release Remaining Encumbrances job.

Support Ability to Continually Recalculate the Encumbrance

Description

A new job supports the ability to calculate exchange rates on encumbrances based on the current date rather than the transaction date.

Prior to this release, encumbrances used the exchange rates from the creation date of the PO line or invoice. This job, called **Recalculate transactions exchange rates**, is not updated with the passage of time or adjustments in currency ratios. The job is still available and active from the **Administration > Manage Jobs** section of the Alma menu.

The new job, **Recalculate PO line encumbrances based on current exchange rates**, allows for amounts to be calculated to a current scale at any point during the transaction process.

Note: This job applies only to encumbrance transactions that have not been fully released.

By default, this job is disabled. To enable functionality, a user with implementation rights needs to enable the job (**Administration > Monitor Jobs > Scheduled** tab, then enable the yellow check mark in the **Active** column). See image below.

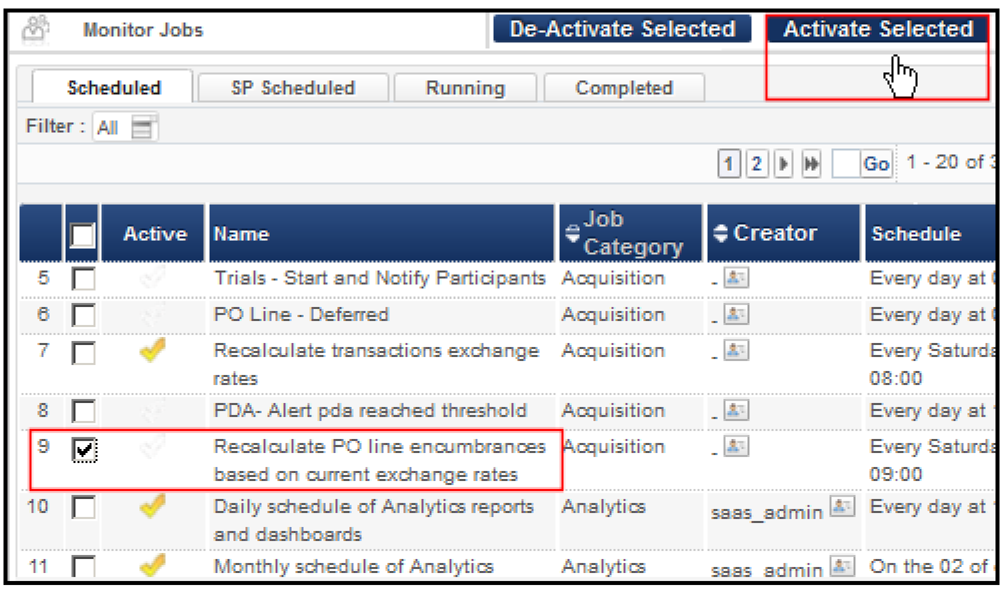


Figure 3 - Implementation View for Activating Jobs

Technical Instructions

The following roles can run the job:

- Purchasing Operator
- Purchasing Manager
- Systems Administrator
- Acquisitions Administrator

The following roles can monitor the progress of the job:

- Purchasing Operator
- Purchasing Manager
- Inventory Operator (Digital, Electronic, or Physical)

To run the job:

1. On the Run a Job page (**Administration > Manage Jobs > Run a Job**), locate the **Recalculate PO line encumbrances based on current exchange rates** job and select it. Click **Next**.
2. Follow the steps of the wizard as described in the *Alma Administration Guide* or online help (Running Jobs on Defined Sets).

To view information about the results of the job:

1. On the Monitor Jobs page (**Alma > Administration > Manage Jobs > Monitor Jobs**), locate the **Recalculate PO line encumbrances based on current exchange rates** job in the **Scheduled** tab.

Note: The **Recalculate PO line encumbrances based on current exchange rates** job is different from the **Recalculate transactions exchange rates** job. The latter is an established job with slightly different applications for how it can be used. For further information, see the *Alma Administration Guide* or the online help (**Administration > Monitoring Jobs > Scheduled** tab).

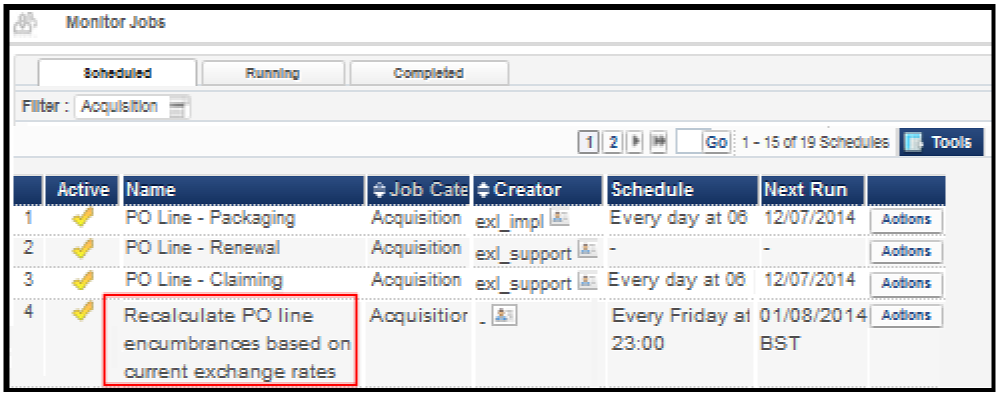


Figure 4 - Recalculate PO Line Encumbrances Based on Current Exchange Rates

2 Follow the actions for viewing the job report (select **Actions > Job History,** find the specific date and time of the job, and select **Actions > Report** in the row of the job). For details, see **Viewing a Job Report** in the *Resource Management Guide* or online help.

The report displays events and counts for the transactions.

Missing Elements in XSD Export Invoices

Description

In order to support exporting invoices using XSD, Ex Libris added the following new fields to the invoice XML:

- The details of the user (first and last names) who approved this invoice
- The MMS ID of the PO line
- The identifier type (ISBN or ISSN)
- The identifier value
- The place of the item creation
- The date of the item creation
- The publisher of the item
- The creator of the item
- List of interested users within the order
- Fund info (code, type)
- additional_order_reference fields

Other Acquisitions Enhancements

- The following new values were added to the **License status** drop-down list: **Expired**, **Retired**. Note that these fields have no effect on license functionality.
- Mapping for the **Vendor reference number type** was added to the New Order import profile.

Resource Management

The following sections describe the functions provided for the Resource Management functional area in the August 2014 release of Alma.

Call Number Mapping to Holdings Record

Description

This enhancement enables customers to customize the way in which the call number is mapped to the holdings record.

Previously, the 852 h subfield was taken from a bibliographic field, which was determined by the first non-empty parameter found in the following list, starting at the top:

1. The first indicator of the default holdings template.
2. The call number type in the library location (**Administration > General Configuration > Configuration Menu > Physical Locations**).
3. The call_number_type defined in the CustomerParameters table (**Resource Management > Resource Configuration > Configuration Menu > Other Settings**).

If the first indicator was:

- **0** – The 090 or 050 field was copied to holdings record.
- **1** – The 082 field was copied to holdings record.
- **2** – The 060 field was copied to holdings record.
- **3** – The 086 field was copied to holdings record.
- **8** – The 084 field was copied to holdings record.

To allow the customization of the call number mapping, Alma has added the Call Number mapping table to the Resource Configuration menu. After the mapping rules are updated in the new mapping table, you can use the following methods to map the call numbers from the bibliographic records to the holdings records:

- Save a new holdings record in the MD Editor. Note that the call numbers are not mapped to modified holding records unless you use one of the other methods.
- Run the **Update from Bibliographic** tool for a new or modified holdings record from the **Tools > MARC21 Holdings** menu in the MD Editor.
- Run an import profile job.

Out of the box, the Call Number mapping table is configured to map the call numbers as they have been in previous releases of Alma. Alma uses the first matching row in the table to map the call number for each record. To determine the matching row, Alma compares each record with each enabled mapping row (starting at the top of the table) and stops checking when a mapping row matches all of the following conditions:

1. The first indicator of the 852 field in the holdings record matches the indicator specified in the **852 Ist Ind** column of the mapping table.
2. If the first indicator of the 852 field in the holdings record is a **7,** the value specified in the **852 Subfield 2** column must also match the corresponding value in the holdings record.
3. The MARC tag specified in the **Bib Field to Copy** column of the mapping record exists in the bibliographic record.

If a matching row is found, the fields and subfields specified in the **Bib Field Copy** and **Bib Subfields to Copy** columns are copied from the bibliographic record to the 852 subfields specified in the **852 Subfield Destinations** columns. If all conditions are not met, the system continues to the next row in the mapping table.

Technical Instructions

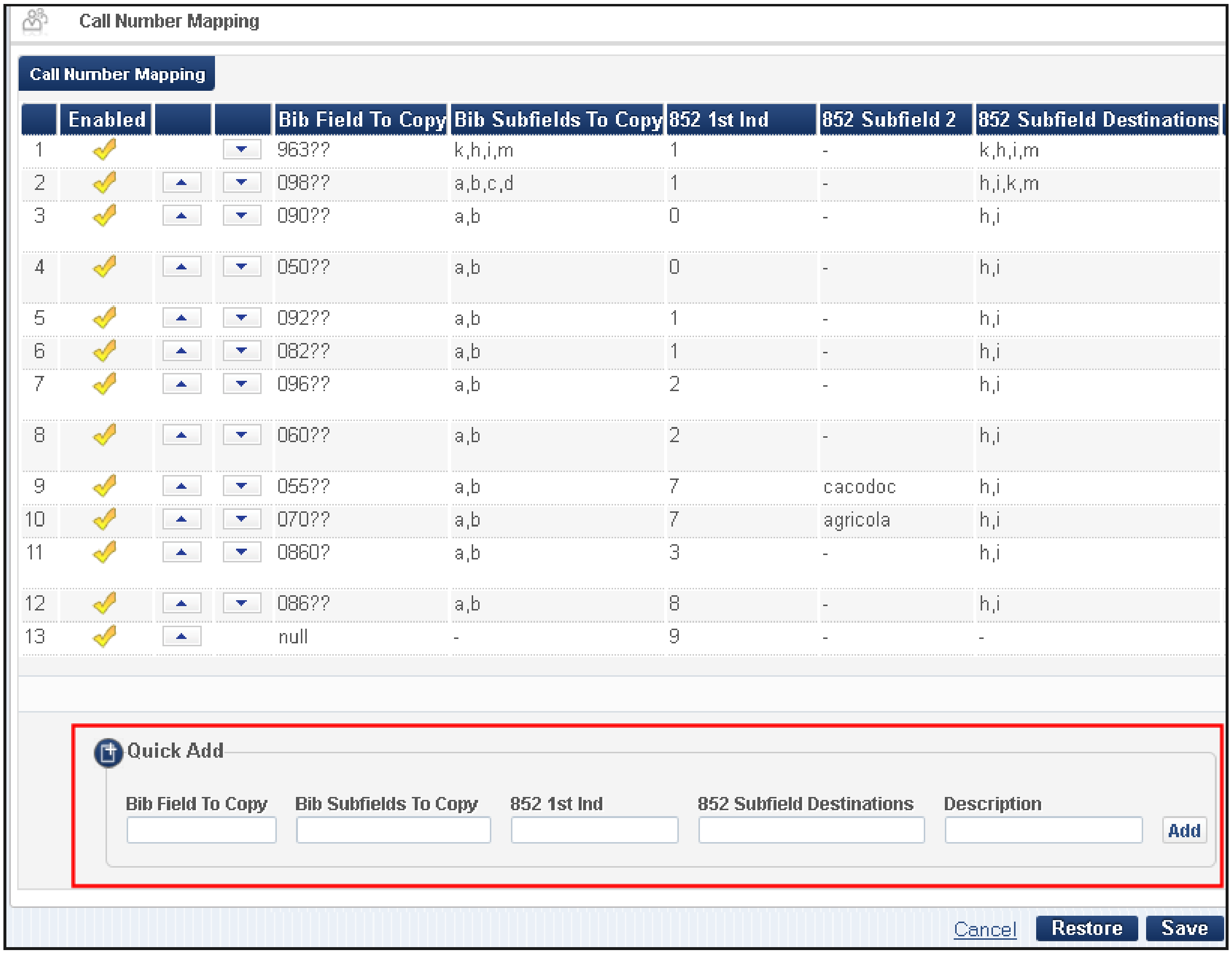
The following roles can configure the call number mapping rules:

- Catalog Administrator
- General System Administrator

To add a call number mapping row:

1. On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Call Number Mapping** under **General**.

   The Call Number Mapping page opens.



	Enabled			Bib Field To Copy	Bib Subfields To Copy	852 1st Ind	852 Subfield 2	852 Subfield Destinations
1	✓		▼	963??	k,h,i,m	1	-	k,h,i,m
2	✓	▲	▼	098??	a,b,c,d	1	-	h,i,k,m
3	✓	▲	▼	090??	a,b	0	-	h,i
4	✓	▲	▼	050??	a,b	0	-	h,i
5	✓	▲	▼	092??	a,b	1	-	h,i
6	✓	▲	▼	082??	a,b	1	-	h,i
7	✓	▲	▼	096??	a,b	2	-	h,i
8	✓	▲	▼	060??	a,b	2	-	h,i
9	✓	▲	▼	055??	a,b	7	cacodoc	h,i
10	✓	▲	▼	070??	a,b	7	agricola	h,i
11	✓	▲	▼	0860?	a,b	3	-	h,i
12	✓	▲	▼	086??	a,b	8	-	h,i
13	✓	▲		null	-	9	-	-

Figure 5 – Call Number Mapping

2 In the Quick Add section, enter the following fields and click **Add** to add a new mapping row to the bottom of the list:

- **Bib Field To Copy** – Enter the 5-digit field from which to map the call number from the bibliographic record to the holdings record. To specify wildcards, use a question mark (for example, 963??). This is a required field.
- **Bib Subfields To Copy** – Specify which subfields are to be copied from the field specified in the **Bib Field to Copy** field to the holdings record. Multiple subfields must be separated by a comma with no spaces. This is a required field.
- **852 1st Indicator** – Enter the value of the first indicator to be matched in the holdings record. This is a required field.
- **852 Subfield Destinations** – Enter the 852 subfields to which the call number is mapped in the holdings record. Multiple subfields must be separated by a comma with no spaces. This is a required field.
- **Description** – Enter an optional description for the rule.

3 Click the up and down arrows in the new mapping row to change the order in which the rule is checked.

4 Disable or delete any rules that are no longer needed.

5 Click **Save**.

Enhancements to the Portfolio Export and Portfolio Loader

Description

The following enhancements have been made to the portfolio export of electronic collections:

- It is now possible to export CZ electronic collection portfolios. This enables you to compare collections managed in the CZ with vendor-provided subscription lists. (See the Technical Instructions section below.)
- Portfolio exports from the CZ or IZ now include a **Localized** column. This field indicates whether a portfolio has been localized from the CZ to your institution.

book_test_0607141638_Community_portfolios_August.xls [Compatibility Mode]

	A	B	C	D	E	F	G	H	I
1	LOCALIZED	ISSN	ISSN	ISSN	ISBN	ISBN	ISBN	PORTFOLIO_PID	MMS
2	Y				0-88415-625-7	0-08-049851-5	9786612330131	5310119950000521	9936241500521
3									
4									

Figure 6 – Localized Column in Portfolio Export Report

- In order to improve performance, portfolio exports from the CZ or IZ that have more than 5000 portfolios are now run as jobs in the background. Smaller exports continue to run in the foreground.

The following enhancement has been made to the institution portfolio loader:

- The portfolio loader now supports the matching of CZ portfolios based on the CZ portfolio ID and not just the ISSN or ISBN.

Technical Instructions

The following roles can export electronic collection portfolios:

- Repository Manager or Administrator
- Catalog Manager or Administrator

To export CZ electronic collection portfolios:

1. In the Community Zone, perform a repository search to find the electronic collection that you want to export.
2. Click the **Portfolio List** link for the electronic collection in the search results.

Figure 7 – Repository Search for Electronic Collection

3. Select **Tools > Extended Report**.

Figure 8 – Portfolio List for Electronic Collection

4. Select **Tools > Extended Report**.

All portfolios in the collections are exported to Excel. The portfolios for each type of service (such as full text and selected full text) appear in a separate sheet of the Excel file (if the Excel file contains fewer than 5000 portfolios).

Export Electronic Portfolios in KBART Format

Description

This enhancement allows you to export electronic portfolios in the standard KBART format in order to integrate with external third parties that support the KBART standard.

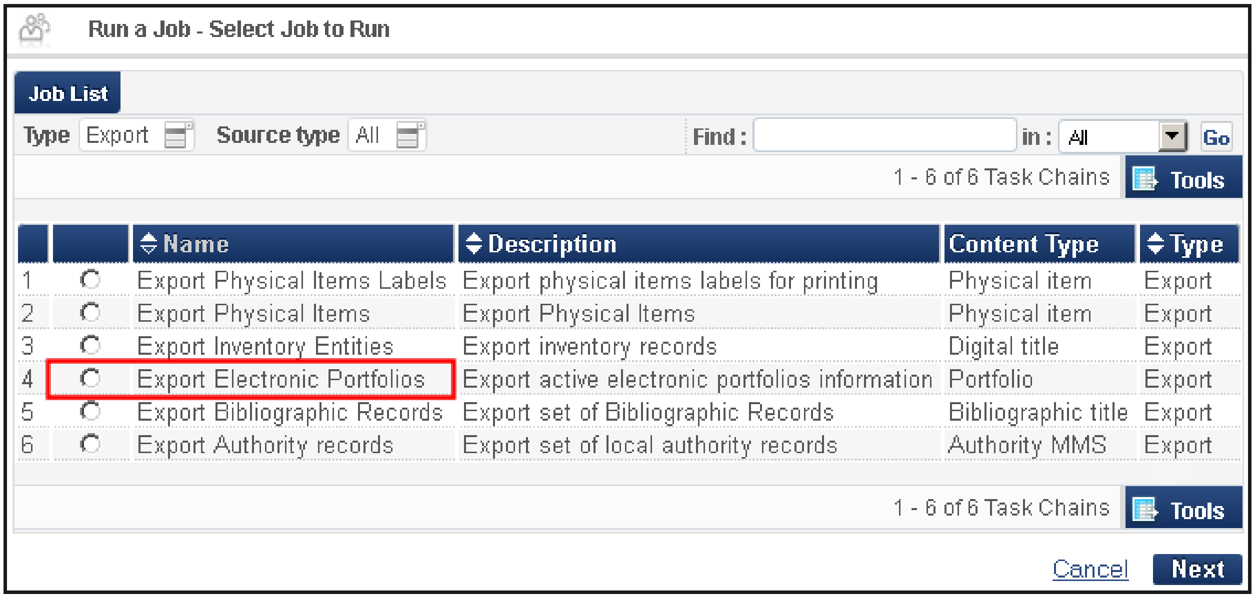
Technical Instructions

The following role can export electronic portfolios:

- Repository Administrator

To export a set of electronic portfolios in the KBART format:

1. Create a set of electronic portfolios.
2. On the Run a Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Export** from the **Type** drop-down filter, select the **Export Electronic Portfolios** job, and click **Next**.



		Name	Description	Content Type	Type
1		Export Physical Items Labels	Export physical items labels for printing	Physical item	Export
2		Export Physical Items	Export Physical Items	Physical item	Export
3		Export Inventory Entities	Export inventory records	Digital title	Export
4		Export Electronic Portfolios	Export active electronic portfolios information	Portfolio	Export
5		Export Bibliographic Records	Export set of Bibliographic Records	Bibliographic title	Export
6		Export Authority records	Export set of local authority records	Authority MMS	Export

Figure 9 – Select Job to Run

3. On the Run a Job – Select Set page, select the set you created in the first step and click **Next**.
4. Enter the following parameters on the Run a Job – Enter Task Parameters page and click **Next**:

   - **Output format** – Specify **KBART schema**.
   - **Number of records in file** – Specify the maximum number of records allowed in an output file: **One File**, **1000**, **5000**, or **10000**. Note that each collection is written to a separate file (according to the KBART standard) even if you select the **One File** option.
   - **Export into folder** – Specify the export folder: **Private** or **Institution**.
   - **FTP configuration** – Select the FTP configuration.
   - **Subdirectory** – Select the subdirectory on the FTP server.
   - **Export only active portfolios** – Select the **Yes** option to export only active portfolios.
   - **Alma Link Resolver base URL** – Enter the base URL for the Alma Link Resolver using the following format and inserting your institution's information where indicated:

     ```
     http://<Primo_host_server:port>/openurl/<Primo_institution_code>/
     <Primo_view_code>?
     ```

If you are unfamiliar with your base URL for the Alma Link Resolver, contact Ex Libris Support for assistance.

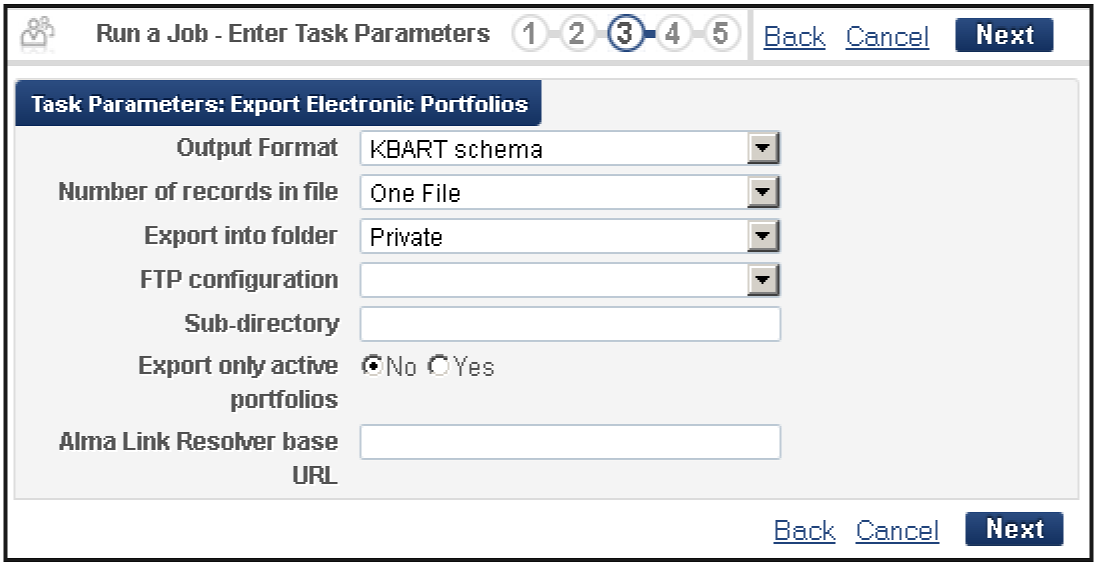


Figure 10 – Enter Task Parameters Page

5 On the Run a Job – Job Details and Schedule page, schedule the job and click **Next**.

6 On the Run a Job – Review and Confirm page, review the job details and click **Submit**.

All portfolios in the set will be exported in the following way, according to the standard KBART format:

- All portfolios belonging to the same e-collection will be part of one file.
- All standalone portfolios that have the same interface attribute will be part of another file.
- All standalone portfolios that do not have an interface attribute will be part of a third file.

The file convention name is `INTERFACENAME_COLLECTIONNAME_DATE.txt`. If `INTERFACENAME` or `COLLECTION_NAME` is not available, `MISC` will be used instead.

The following is an example of exported files:

Exported Files

Cancel

Directory Name 110339520000121

Folder Private

Type EXPORT_PORTFOLIOS

Tools

	Name	Type	Date Created	Size	
1	BlackwellReferen...	File	22/06/2014	1000 bytes	Actions
2	BlackwellReferen...	File	22/06/2014	497 bytes	Actions
3	ColumbiaInternat...	File	22/06/2014	20 KB	Actions
4	EBSCOhost_EBSCOh...	File	22/06/2014	22 KB	Actions
5	EBSCOhost_MISC_2...	File	22/06/2014	811 bytes	Actions
6	Galegroup_GaleCe...	File	22/06/2014	434 KB	Actions
7	Galegroup_GaleUS...	File	22/06/2014	20 KB	Actions
8	MISC_etaypackage...	File	22/06/2014	523 bytes	Actions
9	MISC_MISC_2014-0...	File	22/06/2014	1 KB	Actions
10	Taylor&FranciseB...	File	22/06/2014	97 KB	Actions
11	Westlaw_Westlawl...	File	22/06/2014	6 MB	Actions

Figure 11 – Exported Files in KBART Format

Enable Indexing of 09X Fields

Description

Alma now allows you to create search indexes for 09X fields and customize the labels that display for each index on the Repository and Advanced Search pages in Alma.

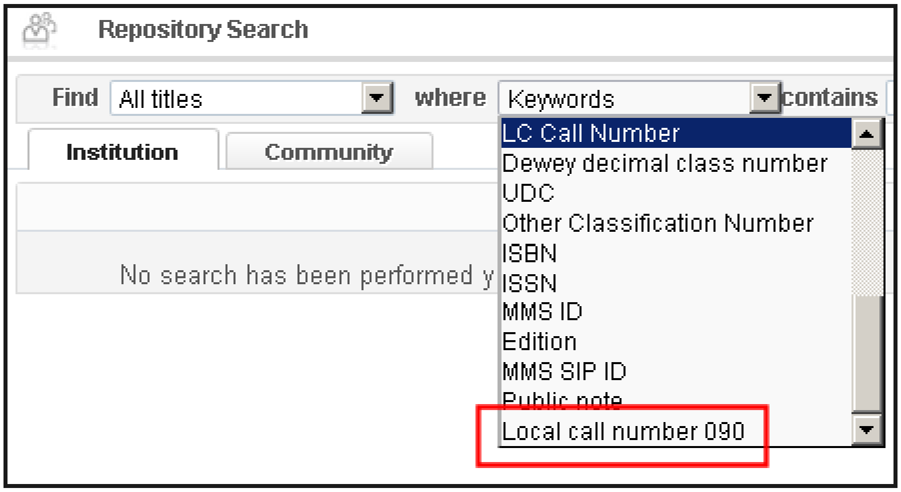


Figure 12 – Repository Search Page (090 Field Displayed)

Technical Instructions

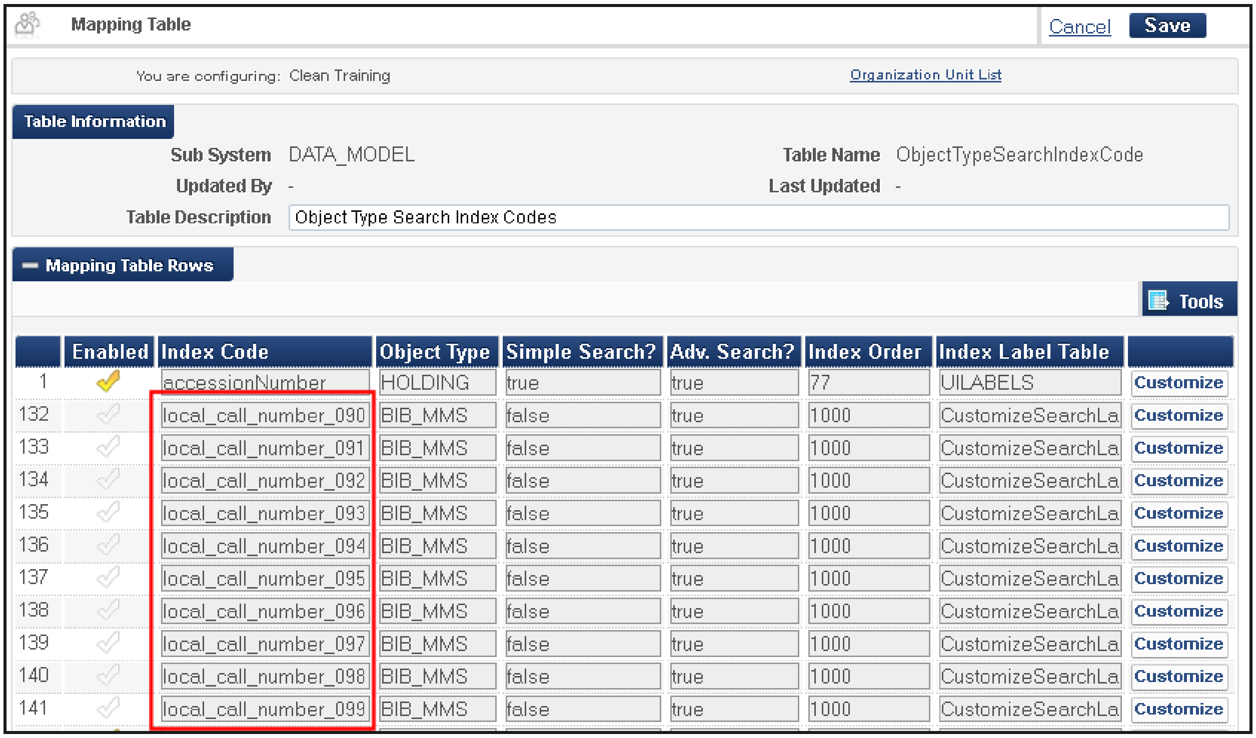
The following roles can create search indexes for 09X fields:

- Catalog Administrator
- General System Administrator

To customize the 09X Field Indexes:

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

The ObjectTypeSearchIndexCode mapping table opens.



Mapping Table Cancel Save

You are configuring: Clean Training Organization Unit List

Table Information

Sub System DATA_MODEL Table Name ObjectTypeSearchIndexCode

Updated By - Last Updated -

Table Description Object Type Search Index Codes

Mapping Table Rows

Tools

	Enabled	Index Code	Object Type	Simple Search?	Adv. Search?	Index Order	Index Label Table	
1	✓	accessionNumber	HOLDING	true	true	77	UILABELS	Customize
132		local_call_number_090	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
133		local_call_number_091	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
134		local_call_number_092	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
135		local_call_number_093	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
136		local_call_number_094	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
137		local_call_number_095	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
138		local_call_number_096	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
139		local_call_number_097	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
140		local_call_number_098	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize
141		local_call_number_099	BIB_MMS	false	true	1000	CustomizeSearchLa	Customize

Figure 13 – ObjectTypeSearchIndexCode Mapping Table

2 Click **Customize** for the 09X field (**local_call_number_090** - **local_call_number_099**) that you want to modify. Note that the name of the **Customize** button changes to **Restore,** which allows you to revert the row to its default values.

3 Modify the following fields in the mapping row:

- **Enabled** – Select this field to enable this type of indexing. A yellow check mark indicates that the index has been enabled.
- **Simple Search?** – Enter **true** if you want this index to apply to the Repository Search page.
- **Adv. Search** – Enter **true** if you want the index to apply to the Advanced Search page.
- **Index Order** – Specify the search index priority. Lower numbers receive higher search index priority.

4 Click **Save**.

5 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Customize Indexes Labels** under **Search Configuration**.

The Customize Search Labels code table opens.

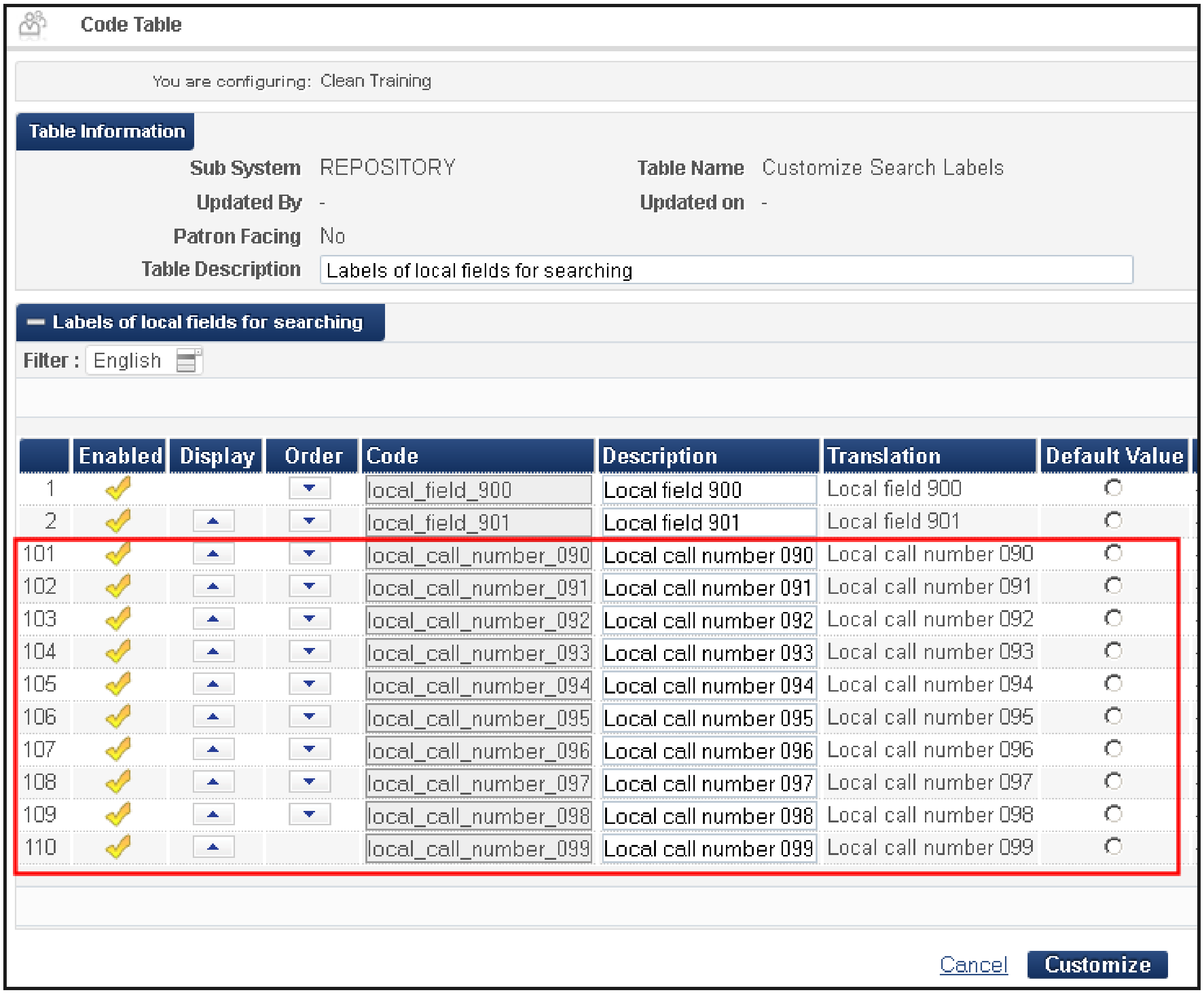


Figure 14 – Customize Search Labels Code Table

6. For the 09x fields (**local_call_number_090** - **local_call_number_099**), configure the display order, update the description, and click **Customize**.

Export Tasks from CZ Updates Task List

Description

The Extended Export tool has been added to the Community Zone Updates Task List page to allow staff users to export the task list to an Excel file. Note that each file may contain up to 50,000 rows before the task list is split into additional files.

In addition, the Title and Identifier fields have been split into two columns on the Community Zone Updates Task List page.

Technical Instructions

The following role can work with Community Zone Updates Task List:

- Repository Manager

To export the list of tasks:

1 Open the Community Zone Updates Task List page (**Resource Management > Manage Inventory > Community Zone Updates Task List**).

2 Select **Tools > Extended Export**.

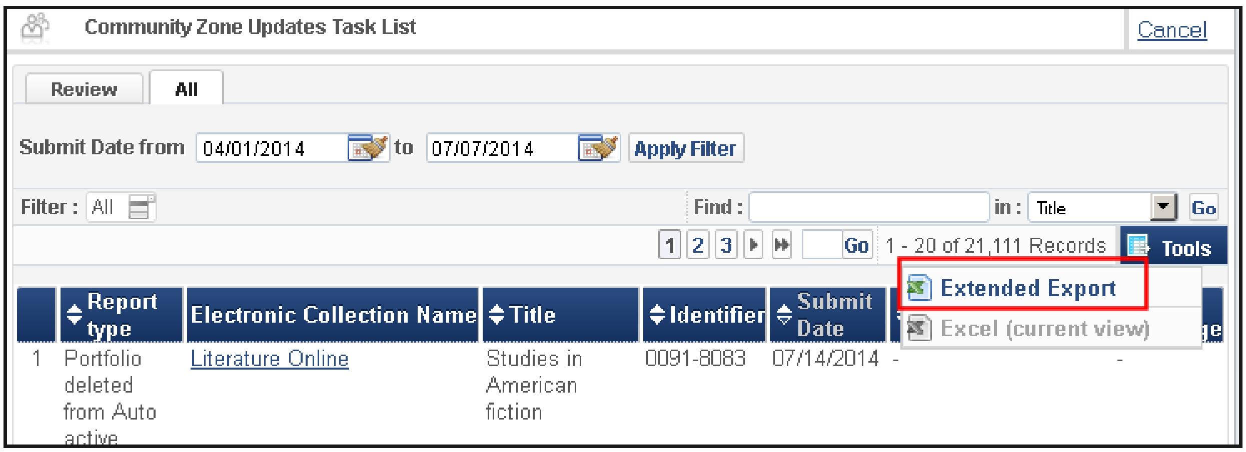


Figure 15 – Community Zone Updates Task List Page

3 In the Confirmation Message dialog box, select one of the following options for the **Export into folder** field: **Private** or **Institution**.

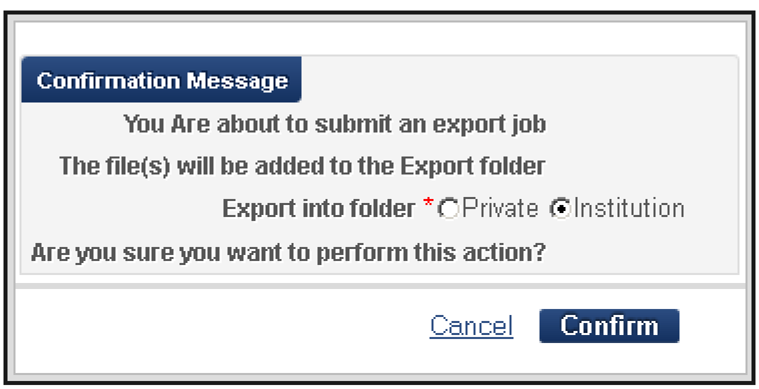


Figure 16 – Community Zone Updates Task List Page

4 Click **Confirm** to run the export.

5 To monitor and view the export, use the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

Derive New Bibliographic Records from Existing Bibliographic Records

Description

This enhancement adds the Derive New Record tool to the MARC21 Bibliographic menu in the MD Editor. Using the related bibliographic record and the default template as the basis, this tool allows you to add a new record that includes either of the following types of relations:

- Host Item (**773**) – An analytical record that refers to a specific article in a journal that is described by another bibliographic record.
- Other Edition (**775**) – A record that describes other editions of the same bibliographic record.

Each of the above fields includes the following subfields, which are populated from the original related record:

- **t** – The original 245.a (title).
- **w** – A repeatable subfield that contains the 035.a subfield for each 035 field and an additional subfield that contains the original MMS ID.
- **x** – A non-repeatable ISSN (if it exists in 022.a). The tool uses the first occurrence only.
- **z** – A repeatable ISBN (if it exists in 020.a/020.e).

Placeholders are created for the following fields, but the content of these fields must be entered manually:

- **g** – Related parts
- **p** – Abbreviated title
- **q** – Enumeration of first page

Note: The system removes empty subfields when the new holdings record is saved.

In addition, this tool includes the following fields from the original related record and combines them with fields from the default template:

- **050**, **080**, and **260** – Includes only the first occurrence from the original related record, but also includes other occurrences from the default template.
- **300.c** – Includes all occurrences of the 300 field that have a **c** subfield from the original related record. Note that tool copies only the **c** subfield from the original related record.

Technical Instructions

To work with metadata, you must have one of the following roles:

- Cataloger
- Catalog Manager
- Catalog Administrator

To derive a new record:

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

2 Specify the default template and open the related record to which you want to link.

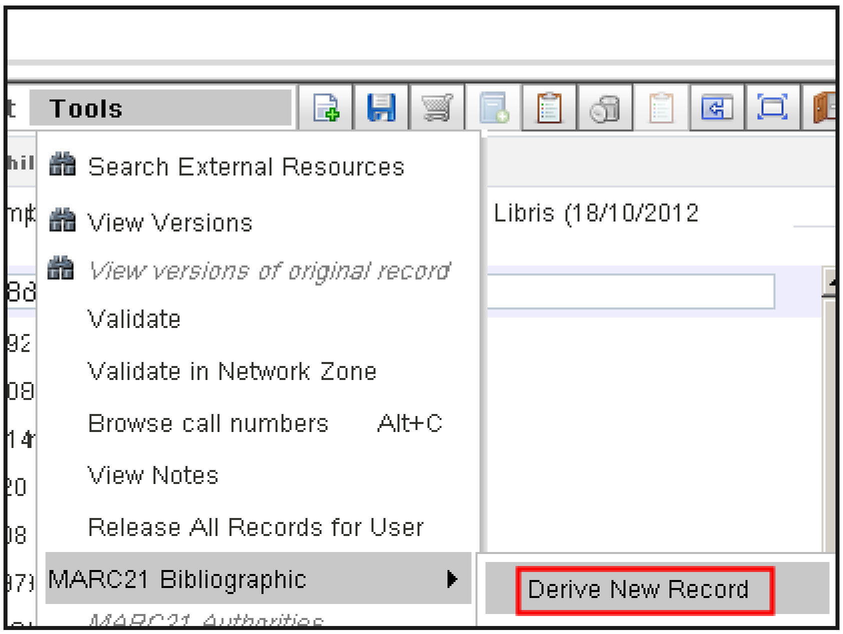


Figure 17 - Select the Derive New Record Tool

3 Select **Tools > MARC21 Bibliographic > Derive New Record** to open the Derive New Record dialog box.

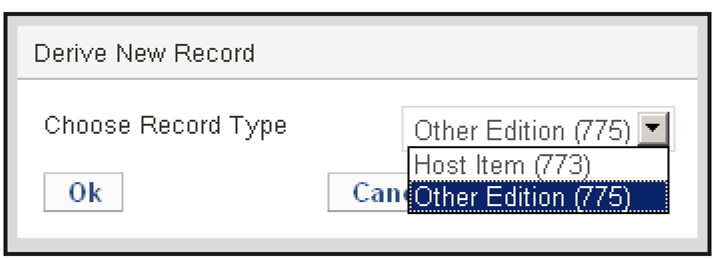


Figure 18 - Select 773 or 775 Field

4 Select **Host Item** (773) or **Other Edition** (775) from the **Choose Record Type** drop-down list and click **OK**. The derived record opens.

For example, the following figure shows the fields that were used to populate the new derived record:

Working on -test_Import MARC bin (993992200000121) , Created by Ex Libris (18/10/2012 09:37:02 AM IST)

020			$$a 9780802716095
035			$$a (OCoLC)1810120601 $$z (OCoLC)1810120601
035			$$a (OCoLC)1810120601
040			$$a GEC $$c GEC $$d BAKER $$d OHI $$d YDXCP $$d BTCTA $$d KUT $$d AGL $$d WAU $$d IAC $$d NOR $$d XXH $$d SMP $$d CQU $$d STF $$d NLC $$d DAC $$d TBS
042			$$a pcc
043			$$a n—— $$a s——
050		4	$$a QL676.57.A45 $$b S88 2007
055	0	1	$$a QL698.95
055	0	0	$$a QL698 .95 $$b S77 2007
070	0		$$a QL676.7 $$b .S88 2007
082	0	4	$$a 598.8 $$2 22
100	1		$$a Stutchbury, Bridget Joan, $$d 1962-
245	1	0	$$a test_Import MARC binary file_1810120601 $$c Bridget Stutchbury.
250			$$a 1st U.S. ed.
260			$$a 1810120601 : $$b Walker & Co., $$c 2007.
300			$$a 255 p. : $$b ill. (some col.), maps ; $$c 24 cm.
504			$$a Includes bibliographical references (p. 227-244) and index.

Figure 19 - Original Related Record

The following figure shows the results of the new derived record. The non-highlighted fields are taken from the default template.

```
Working on -No Title (99122235300121)
008          ######c####9999xx##r1#########0#####0eng#d
022          $$a
035          $$a (OCoLC)
041 0        $$a
042          $$a
043          $$a
050 0   0    $$a
050     4    $$a QL676.57.A45 $$b S88 2007
210 0        $$a  $$b
222     0    $$a  $$b
245 0   0    $$a  $$b
260          $$a
260          $$a 1810120601 : $$b Walker & Co., $$c 2007.
300          $$a
300          $$c 24 cm.
310          $$a
515          $$a
650     0    $$a  $$x  $$z
651     0    $$a  $$x  $$z
775 0   #    $$t test_Import MARC binary file_1810120601 $$w (OCoLC)1810120601 $$w (OCoLC)
             1810120601 $$z 0802716091 $$z 9780802716095 $$w 993992200000121 $$g  $$p  $$q
```

Figure 20 - Derived Record Showing 775 Field and Other Derived Fields

5 Enter any additional fields and update the empty **g**, **p**, and **q** subfields in the 773 or 775 field.

6 Save your changes to the new record.

Other Resource Management Updates

- The names of the Normalization and Validations tabs on the Profile details page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration > Profile**) have been changed to **Normalization Processes** and **Validation Processes**.

- The 774 field was added to the list of indexed fields as follows:
  - All subfields were added to the Keywords search
  - s,t were added to the Title index
  - w was added to the Other System Number index
  - a was added to the Names index
  - u,x-z were added to the Standard Number index

  The above will be available when re-indexing is run during the course of August.
- The following physical and electronic material types have been added to the relevant drop-down lists:
  - Physical material types: Microform, Video recording
  - Electronic material types: Data set, Website, Video
- An electronic collection's public name and public display name now appear in repository search results list.
- The **Physical Inventory Enrichment** section was added to the Publish bibliographic records from Network Zone to Primo and Publish bibliographic records from Network Zone to Primo - Implementation profiles.

Import Profiles

The following sections describe the functions provided for import profiles in the August 2014 release of Alma.

MD Import Report Replaced by Alternative Report

Description

Previously, Alma generated two reports for the import of metadata. The older report (see figure) is now being replaced by the alternative report, which was previously accessed by clicking the **View Alternative Report** link.

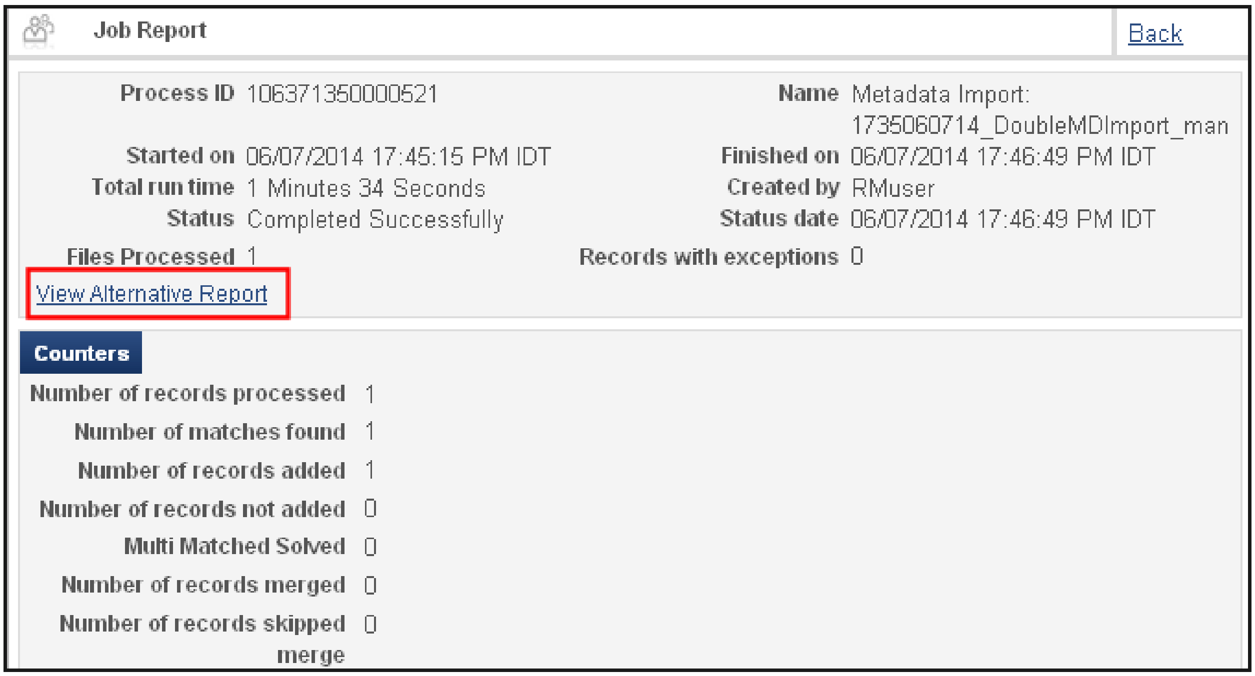


Figure 21 – Old Import Report with Link to Alternative Report

Technical Instructions

The following roles can run imports:

- Purchasing Operator and Manager
- Catalog Manager and Operator

To access the import report:

1. Open the Monitor and View Import page (**Acquisitions > Import > Monitor and View Imports** or **Resource Management > Import > Monitor and View Imports**).
2. Select **Actions > Report** in the row that contains the job you want to manage.

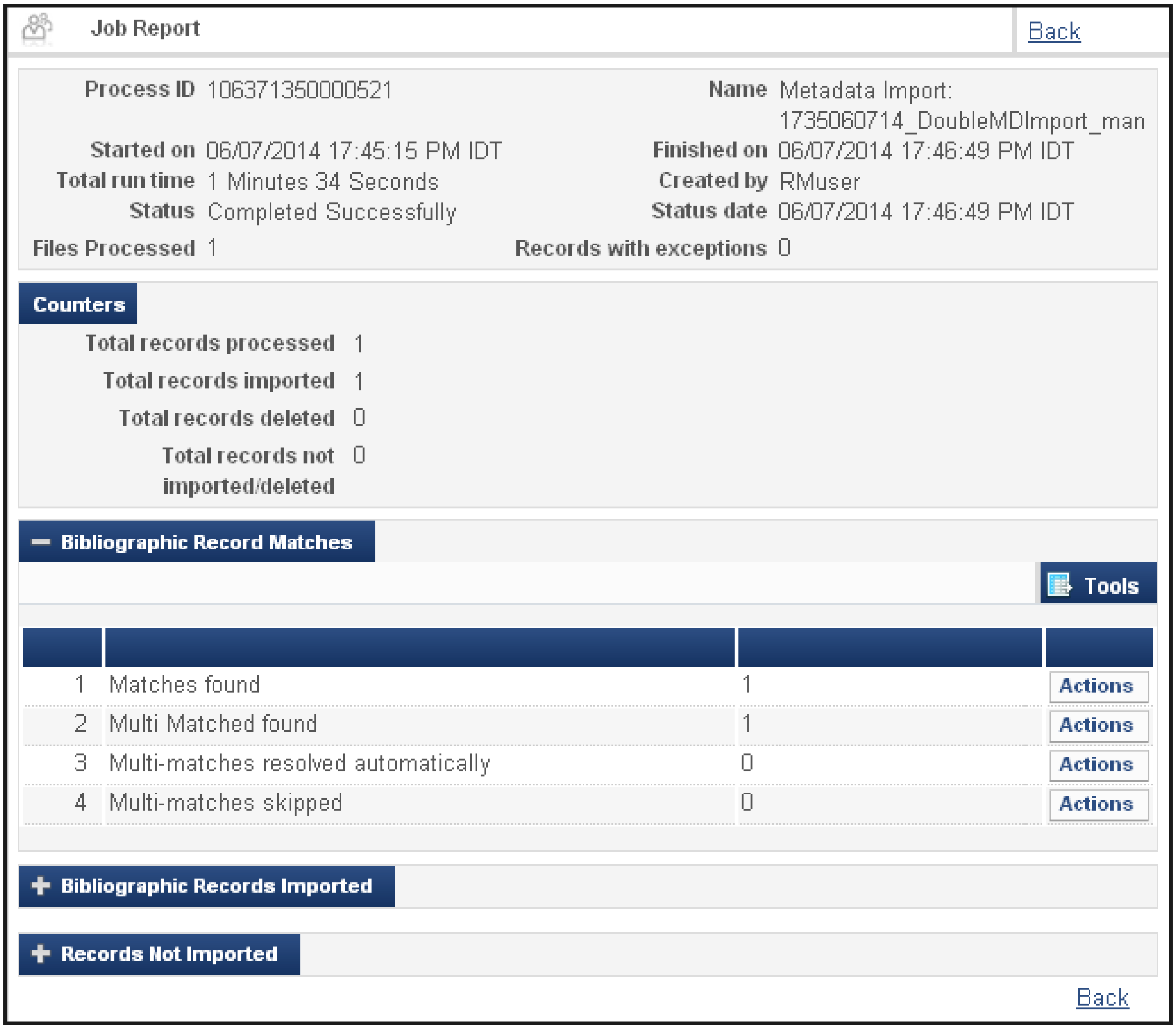


Figure 22 – Only the Alternative Report Displays

Note: For information on the report itself, refer to the *Alma Resource Management Guide* or Alma online help.

Configure Email Notifications for Import Profiles

Description

In all scheduled import profiles that are using the FTP file upload method, Alma now allows you to specify which users and email addresses will receive email notifications when the import has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.

Technical Instructions

The following role can configure import profiles:

- Catalog Administrator

To configure email notifications:

1 Access the Import Profile Details page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**).

2 Select **Actions > Edit** for the import profile you want to edit.

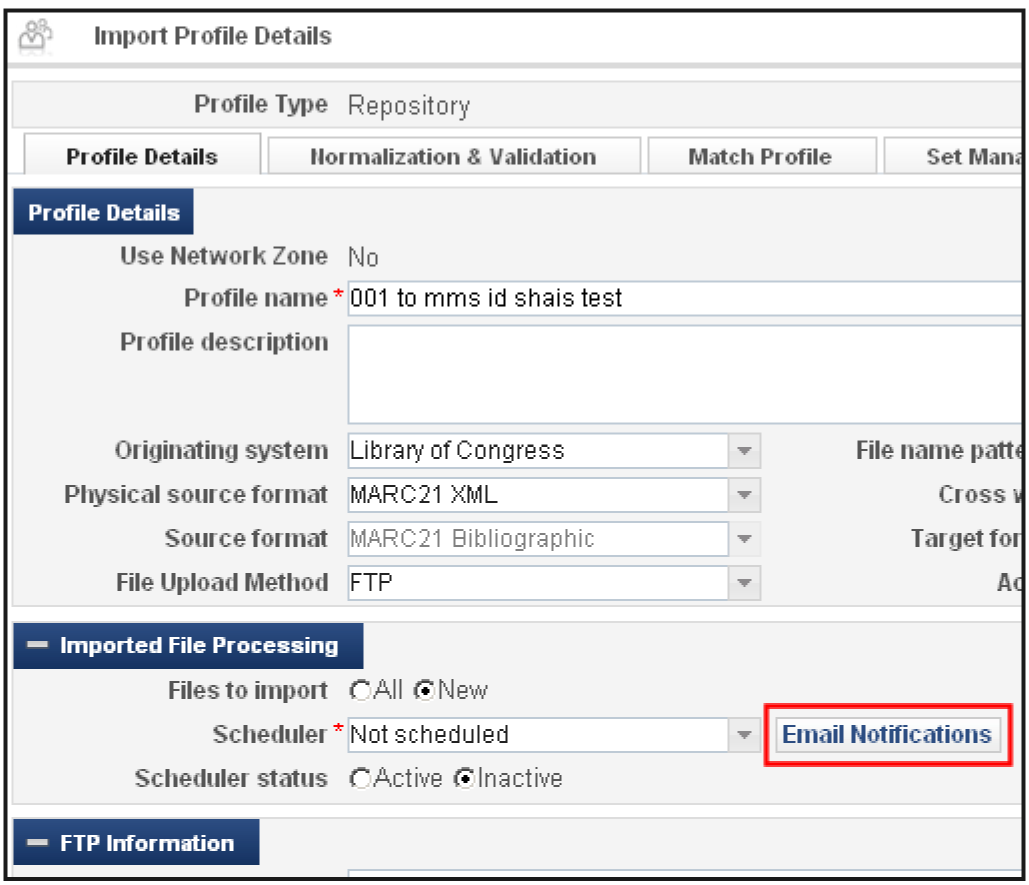


Figure 23 – Import Profile Details Page

3 On the Import Profile Details page, click **Email Notifications** in the Imported File Processing section. The Email Notifications for Scheduled Jobs page is displayed.

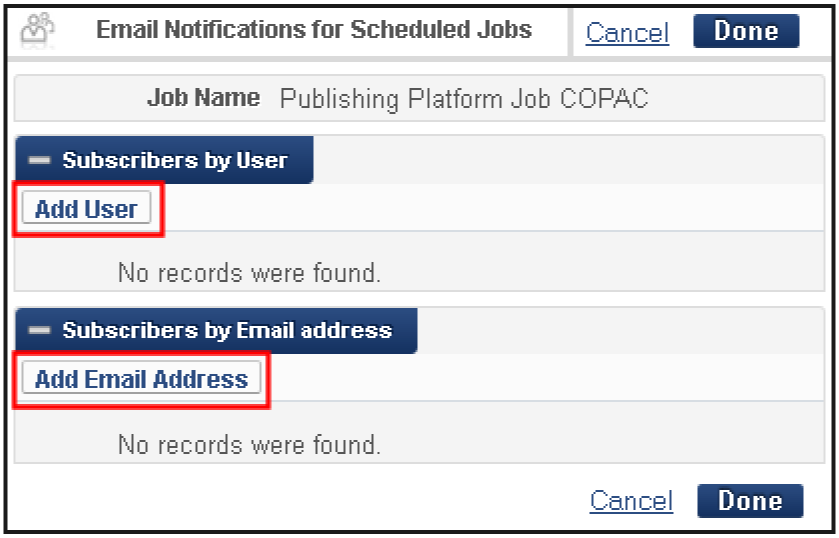


Figure 24 – Email Notifications for Scheduled Jobs Page

Note: The Imported File Processing section does not display unless you set the **File Upload Method** field to **FTP** in the Profile Details section.

---

4 Select the users that you want to receive email notifications.

a Click **Add User**.

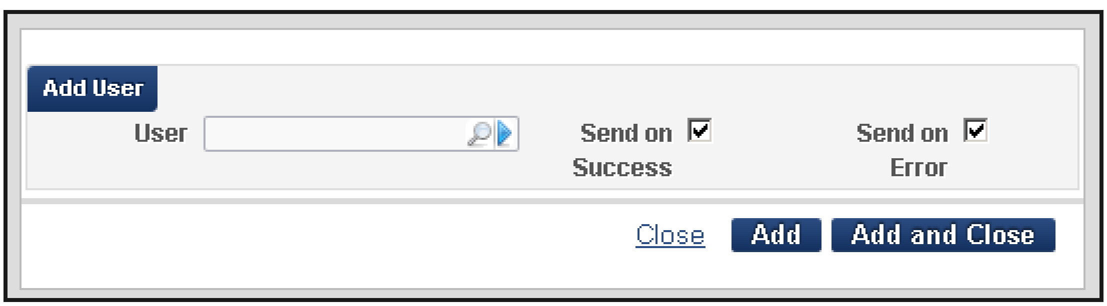


Figure 25 – Add User Dialog Box

b In the **User** field, search for and select a user name.

c Select the following options to specify when the email notification will be sent to the user: **Send on Success** and **Send on Error**.

d Click **Add** to include additional users, or click **Add and Close** to add the user and also close the dialog box.

5 Select the email addresses that you want to receive email notifications.

a Click **Add Email Address**.

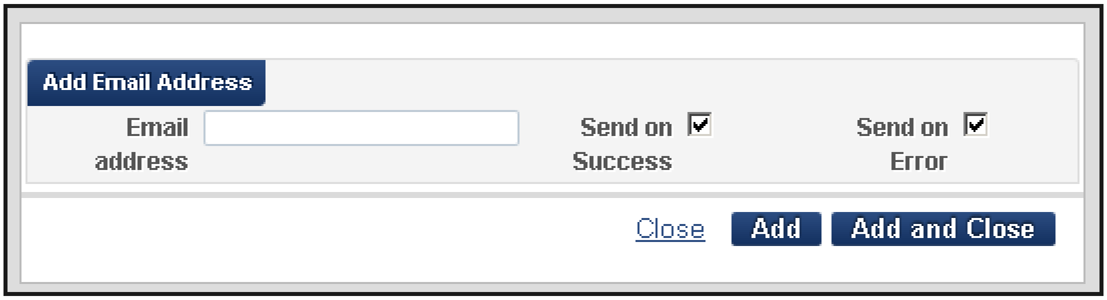


Figure 26 – Add Email Address Dialog Box

- **b** In the **Email address** field, enter an email address.
- **c** Select the following options to specify when the email notification will be sent to the email address: **Send on Success** and **Send on Error**.
- **d** Click **Add** to include additional email addresses, or click **Add and Close** to add the email address and also close the dialog box.

6 Click **Done** to return to the Import Profile Details page.

7 Click **Save** to save your changes to the import profile.

Add Item-Level Attributes to Import Records

Description

This enhancement adds an advanced import option that allows you to map additional physical item-level fields from the import records into Alma. The new mappings include temporary location information, enumeration and chronology subfields, and notes subfields. The following figure shows the advanced mapping page for New Order and Repository import profiles.

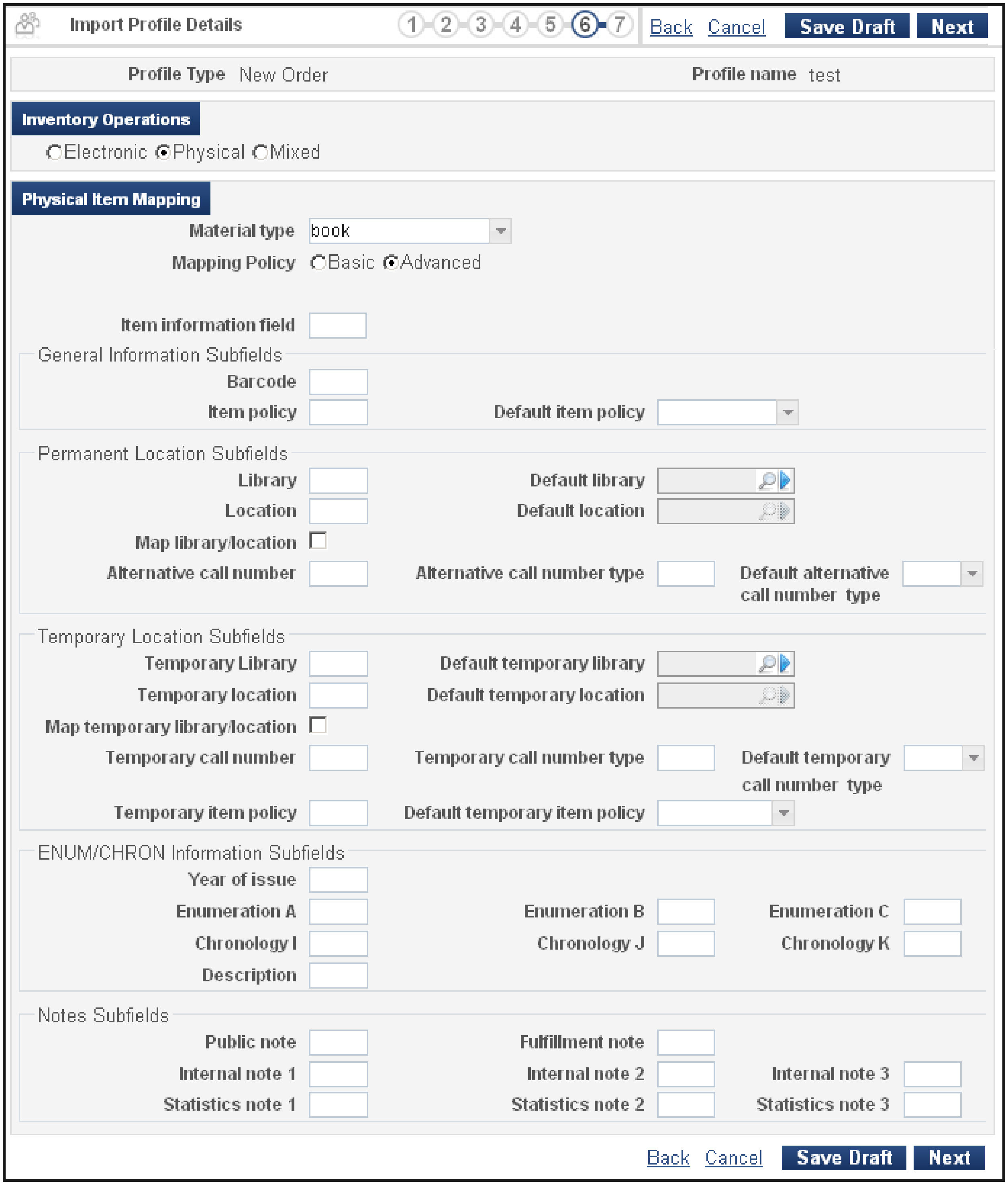


Figure 27 – Import Profile Advanced Mapping Page (New Order and Repository)

In addition, the advanced mode for Update Inventory import profiles allows you to match a barcode as well as the library, location, and PO line to update physical item-level information. The following figure shows the advanced mapping page for Update Inventory import profiles.

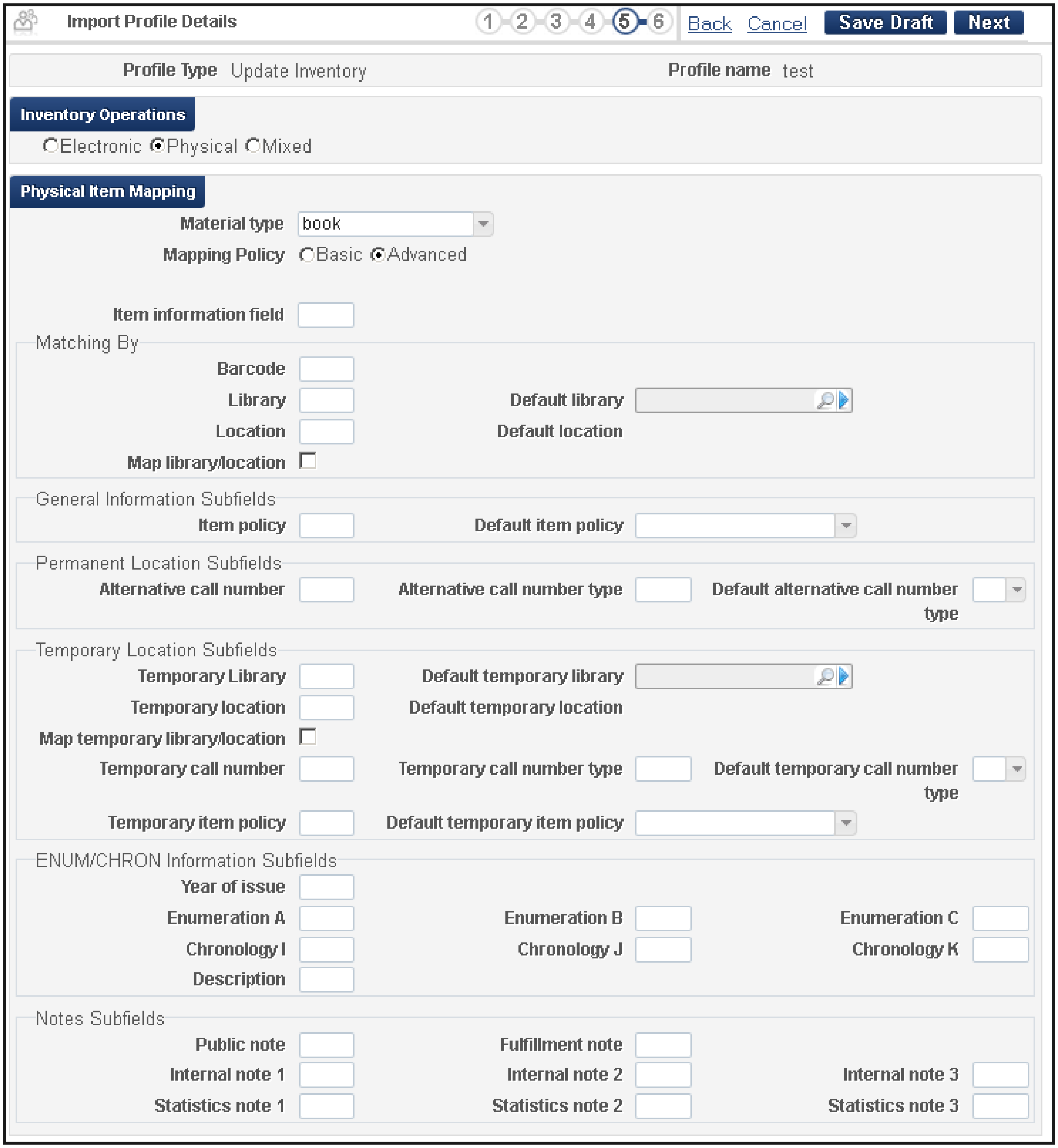


Figure 28 – Import Profile Advanced Mapping Page (Update Inventory)

Technical Instructions

The following role can configure import mapping:

- Catalog Administrator

To configure advanced item-level mapping:

1. On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**), scroll to the import profile that you want to edit in the list or locate it using the Find box at the top of the list, and then select **Actions > Edit**.
2. Click the **Inventory Information** tab.

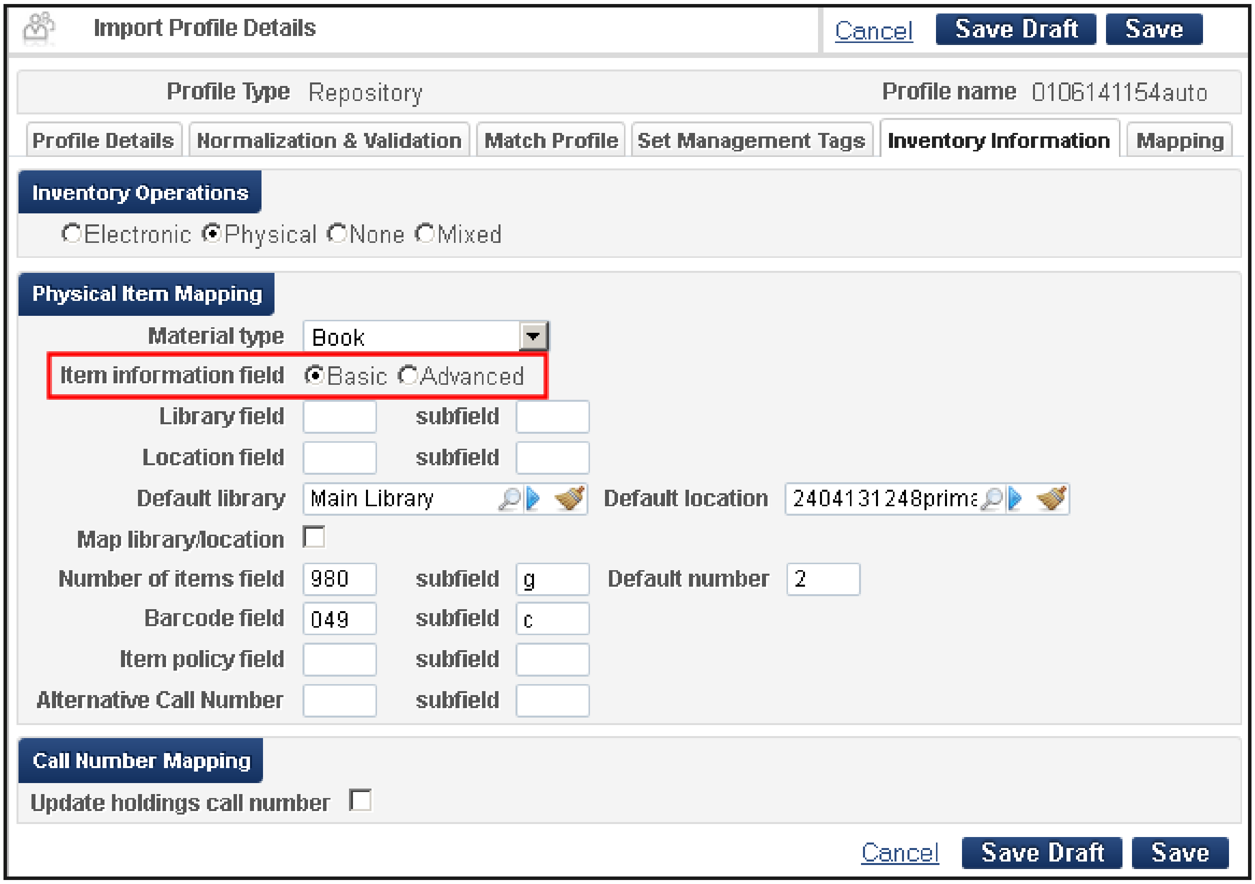


Figure 29 – Import Profile Details – Basic Inventory Mapping

3. Select the **Advanced** option for the **Mapping policy** (note that this will be fixed in the first August hotfix to read **Mapping policy** in all cases and not **Item information field**).

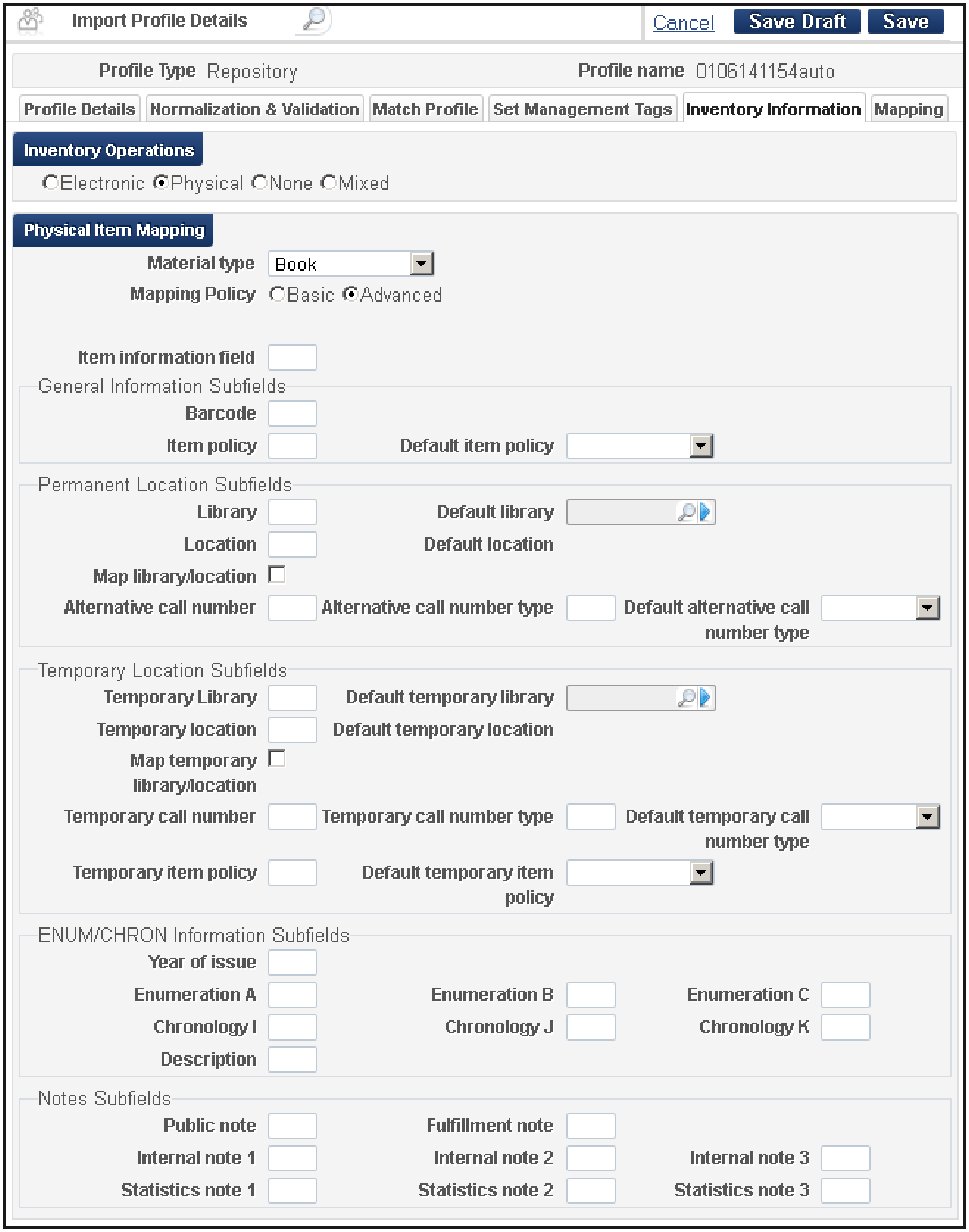


Figure 30 – Import Profile Details – Advanced Inventory Mapping

4 In the **Item Information field**, specify the field from which you want to map item-level information from the input records. Unlike the basic mapping option, all subfields are taken from the same field in the input record.

5 Enter the following fields as needed to map the item-level information from the input records into Alma.

Subfield	Description
General Information Subfields:	
Barcode	The subfield that contains the barcode.
Item policy	The subfield that contains the item's policy.
Default item policy	The item policy that is mapped by default if the item's policy is empty in the input record.
Permanent Location Subfields:	
Library	The subfield that contains the library information.
Default library	The library that is mapped by default if the item's library information is empty in the input record.
Location	The subfield that contains the location information.
Default location	The location that is mapped by default if the item's location information is empty in the input record.
Map library/location	Select this check box if you want to map the library location. If you select this check box, you must enter the location mapping under the Mapping tab.
Alternative call number	The subfield that contains the alternative call number.
Alternative call number type	The subfield that contains the alternative call number type.
Default alternative call number type	The alternative call number type that is mapped by default if the alternative call number type is empty in the input record.
Temporary Location Subfields:	
Temporary library	The subfield that contains the temporary library information.
Default temporary library	The temporary library that is mapped by default if the item's library information is empty in the input record.

Subfield	Description
Temporary location	The subfield that contains the temporary location information.
Default temporary location	The temporary location that is mapped by default if the item's location information is empty in the input record.
Map temporary library/location	Select this check box if you want to map the library location. If you select this check box, you must enter the location mapping in the Mapping tab.
Temporary call number	The subfield that contains the temporary call number.
Temporary call number type	The subfield that contains the temporary call number type.
Default temporary call number type	The temporary call number type that is mapped by default if the temporary call number type is empty in the input record.
Temporary item policy	The subfield that contains the temporary item policy.
Default temporary item policy	The temporary item policy that is mapped by default if the item's item policy is empty in the input record.
ENUM/CHRON Information Subfields:	
Year of issue	The subfield that contains the year of issue.
Enumeration A, B, and C	The subfields that contain the enumerations.
Chronology I, J, K	The subfields that contain the chronologies.
Description	The subfield that contains the description.
Notes Subfields:	
Public note	The subfield that contains the public note.
Fulfillment note	The subfield that contains the fulfillment note.
Internal note 1, 2, and 3	The subfields that contain the internal notes.
Statistics note 1, 2, and 3	The subfields that contain the statistics notes.

6 Click **Save**.

Note: The format of the file when using the advanced mapping is such that every item is represented by the occurrence of a specific field and all of the item's attributes are represented by the field's subfields.

The following is an example of an import profile definition and a sample import profile:

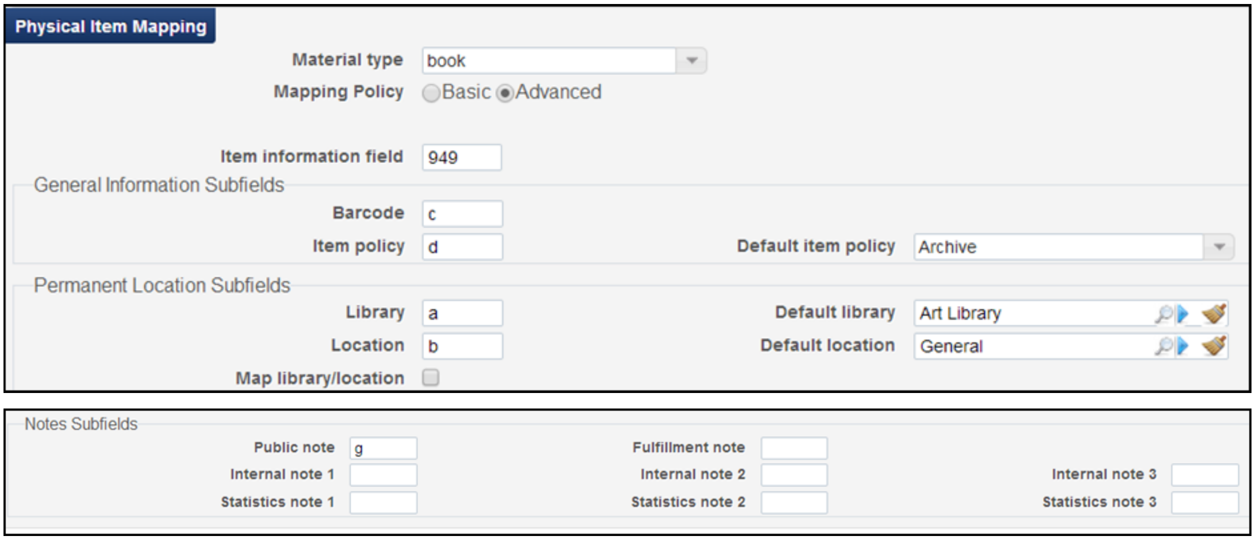


Figure 31 – Import Profile Details – Advanced Inventory Mapping Example

```
<marc:datafield tag="949" ind1="" ind2="">
    <marc:subfield code="a">ART</marc:subfield>
    <marc:subfield code="b">GEN</marc:subfield>
    <marc:subfield code="c">12345</marc:subfield>
    <marc:subfield code="d">DEPOT</marc:subfield>
    <marc:subfield code="g">public note for first item</marc:subfield>
</marc:datafield>
<marc:datafield tag="949" ind1="" ind2="">
    <marc:subfield code="a">LAW</marc:subfield>
    <marc:subfield code="b">GEN</marc:subfield>
    <marc:subfield code="C">123456</marc:subfield>
    <marc:subfield code="d">ARCHIVE</marc:subfield>
    <marc:subfield code="g">public note for second item</marc:subfield>
</marc:datafield>
```

Figure 32 – Sample Import Profile

Fulfillment

The following sections describe the functions provided for the Fulfillment functional area in the August 2014 release of Alma.

Assign Priority to Remote Storage Items

Description

This feature enables assigning priority to remote storage items over non-remote storage items when fulfilling a request.

Technical Instructions

The following roles can assign priority to remote storage items over non-remote storage items when fulfilling a request:

- Fulfillment Administrator
- General System Administrator

To assign priority to remote storage items over non-remote storage items:

1. On the Remote Storage List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Locations > Remote Storage**), select **Actions > Edit** for a Remote Storage location. The Edit Remote Storage Facility page opens.

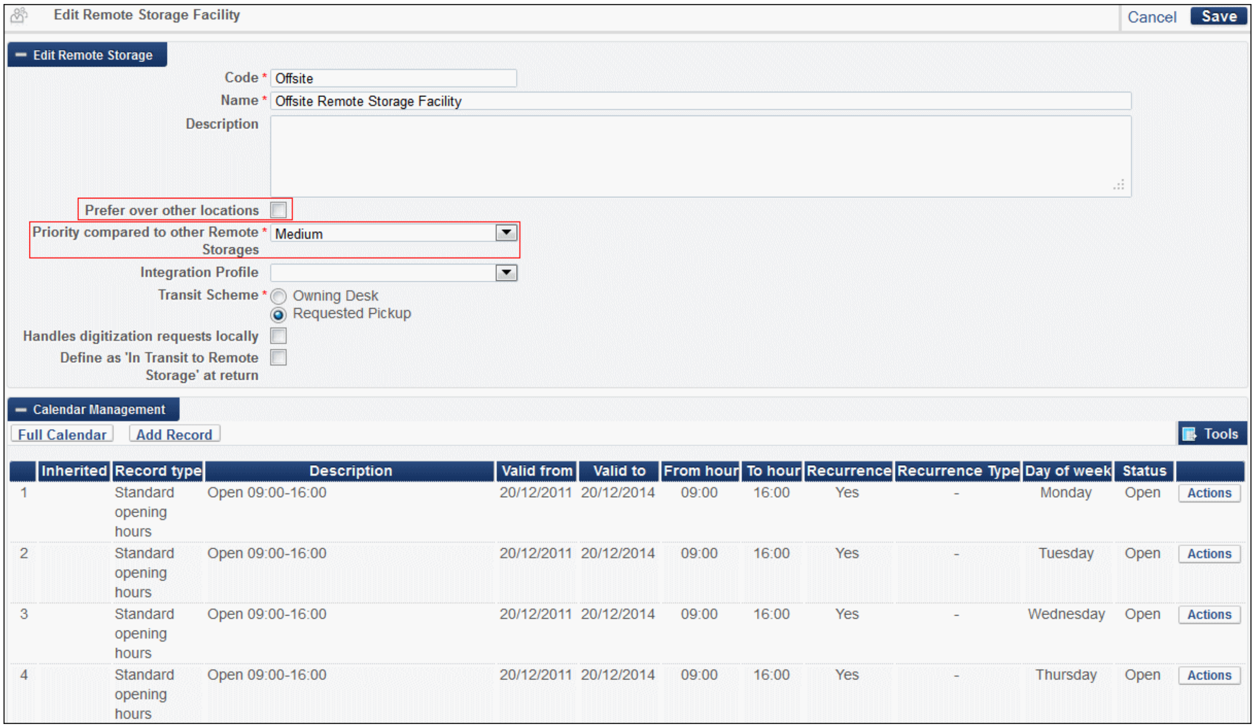


Figure 33 – Edit Remote Storage Facility Page

2 Select **Prefer over other locations** for the specified remote storage location to take priority over non-remote storage locations when fulfilling a request.

3 In the **Priority compared to other Remote Storages** field, select the priority level that this remote storage location takes relative to other remote storage locations.

Note: This field was previously labeled **Priority**.

To view the results of assigning priority to remote storage items:

1 Search for a title with at least one item connected and one item not connected to remote storage and click **Request** to create a request for the item. The Create Request page opens.

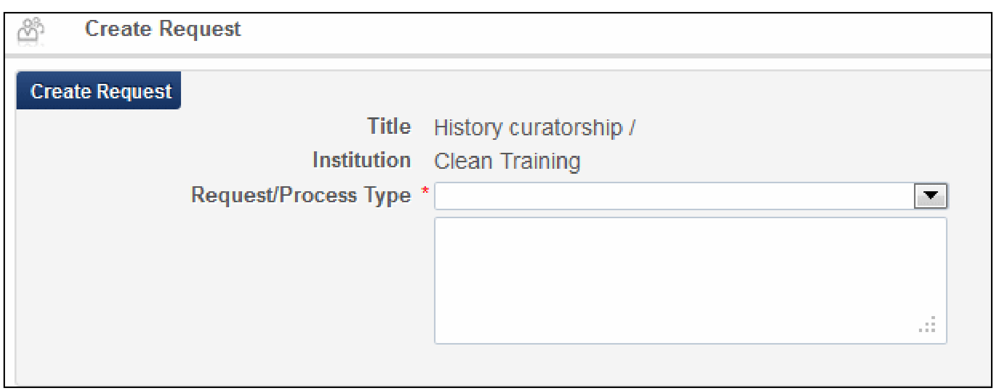


Figure 34 – Create Request Page

2 In the **Request/Process Type** field, select **Patron Physical Item Request**.

3 Configure the other fields on the page and click **Submit**. The newly created request ID displays at the top of the page.

4 Enter the search ID for the request in the search box at the top of the page. The request displays on the Resource Request Monitoring Page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**).

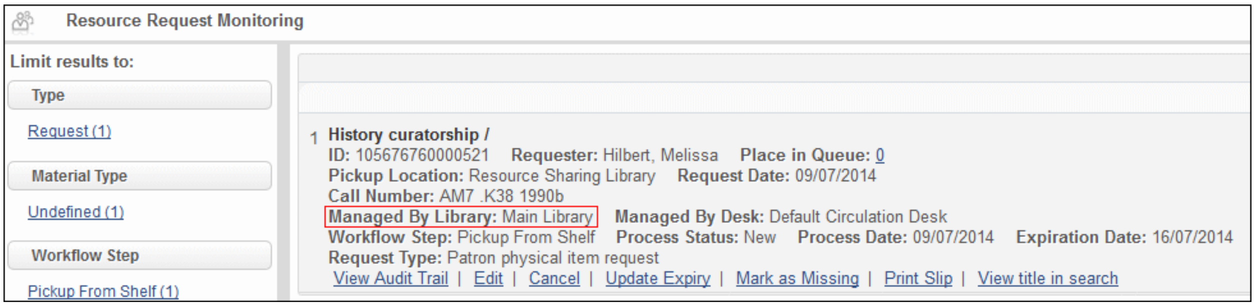


Figure 35 – Resource Request Monitoring Page

If you selected **Prefer over other locations** in the previous procedure, the **Managed by Library** value is the remote storage location.

If you did not select **Prefer over other locations**, the **Managed by Library** value is the non-remote storage location.

Priority Attribute Added for Remote Storage in Get It Tab

Description

This feature enables assigning priority to remote storage items over non-remote storage items when viewing results in the Get It tab. The assigned priority (either remote storage or non-remote storage items) also takes effect when publishing to Primo and in the Primo RTA.

Technical Instructions

The following roles can assign priority to remote storage items when viewing results in the Get It tab, publishing to Primo, or the Primo RTA:

- General System Administrator
- Fulfillment Administrator

To assign priority to remote storage items when viewing results in the Get It tab, publishing to Primo, or the Primo RTA:

1 Open the Locations Ordering Profile page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Locations Ordering Profile**).

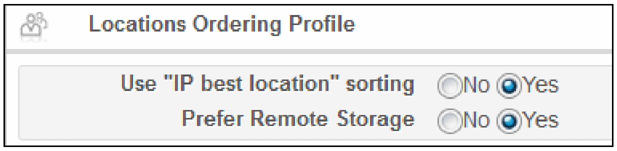


Figure 36 – Locations Ordering Profile Page

2 In the **Prefer Remote Storage** field, select **Yes**.

When clicking **Get It** for a title, the item in the remote storage location displays before items with the same availability in non-remote storage locations. This setting also gives priority to remote storage location items when publishing to Primo and in the Primo RTA.

Allow Multiple Instructors for Courses

Description

This enhancement enables assigning multiple instructors for a course.

Note: As indicated in last month's release notes, when the course information is published to Primo, the CNO element in the XML will contain multiple subfield g entries (the subfield that holds information on course instructors). Your Primo normalization rules will probably normalize all the multiple subfield g entries as required. For example, this would be the case if your normalization rules follow the normalization rule sample provided in the *Primo Interoperability Guide*. However, it is strongly recommended that you check your Primo normalization rules to ensure that they are suitable to handle the $$g field.

Technical Instructions

The following roles can assign multiple instructors for a course:

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

To assign multiple instructors for a course:

1 On the Manage Course Information page (**Fulfillment > Course Reserves > Courses**, select **Actions > Edit** for a course), locate the **Instructors** section at the bottom of the page.

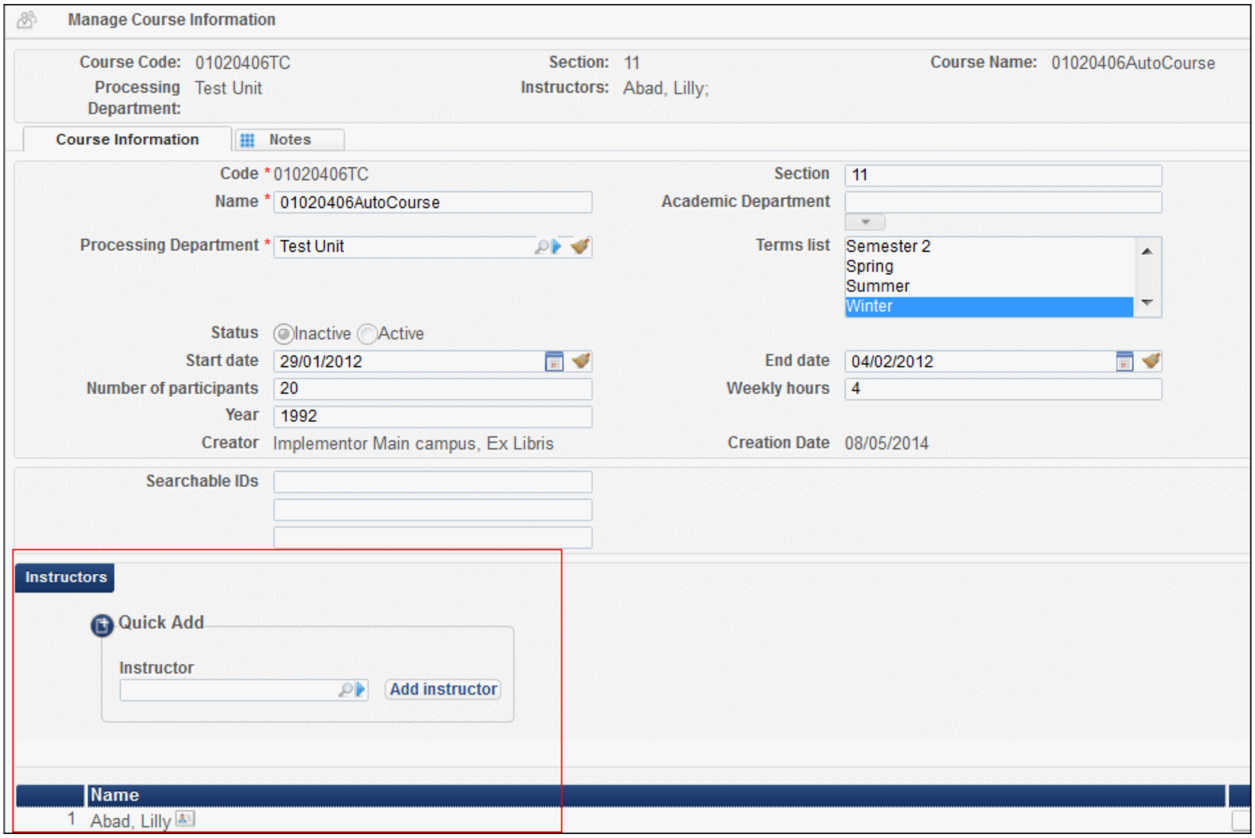


Figure 37 – Manage Course Information Page — Instructors Section

2 In the **Quick Add** box, search for an instructor and click **Add instructor**. The newly added instructor displays at the bottom of the page.

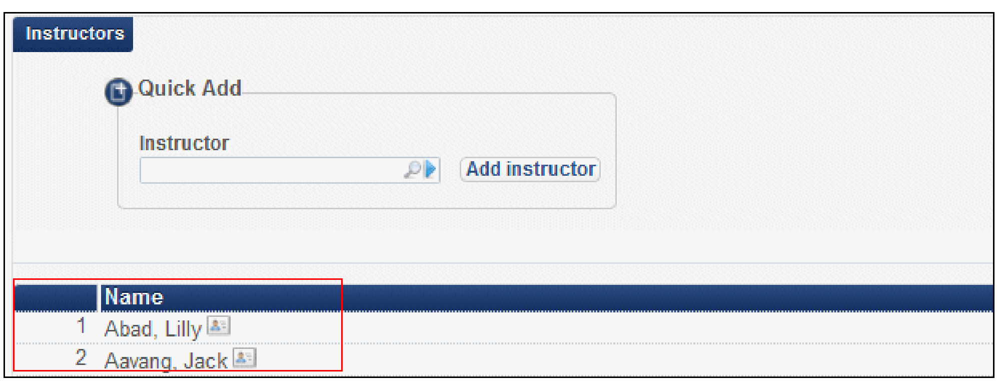


Figure 38 – Manage Course Information Page — Instructors Section

3 Click **Save**. When more than one instructor is configured, the **Courses** page displays **Multiple** in the Instructor column.

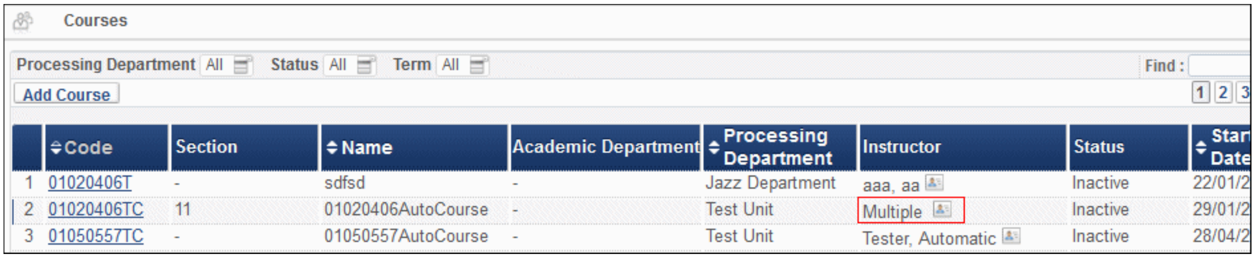


Figure 39 – Courses Page — Multiple Instructors

Multiple instructors are listed by name in the header of the Course's Reading List page (**Fulfillment > Course Reserves > Courses**, select **Actions > Reading List** for a course).

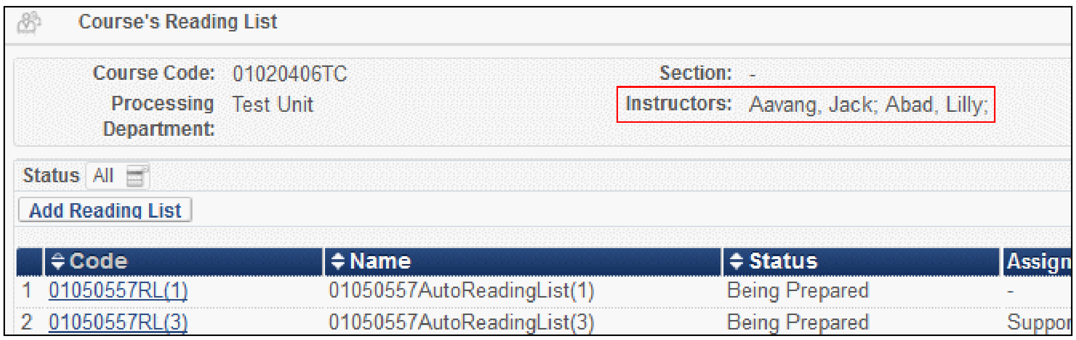


Figure 40 – Course's Reading List Page — Instructors

Additionally, the Courses Management SOAP web service has been enhanced to support multiple instructors attached to a single course. For details, see https://developers.exlibrisgroup.com/alma/apis/soap/course.

Campus Level Self-Ownership Check Option

Description

This feature enables disabling display logic rules (for resource sharing requests), general electronic services, and partner configuration for a title, based on a self-ownership check done at the campus with which the requesting patron is affiliated.

Note: When in conflict, display logic rules settings take precedence over those configured for resource sharing partners.

Technical Instructions

The following roles can disable display logic rules, general electronic services, and partner configuration services on the campus level:

- General System Administrator
- Fulfillment Administrator
- Resource Sharing Partners Manager

To disable general electronic services based on self-ownership at the campus level:

1. On the General Electronic Services page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > General Electronic Services**), select **Actions > Edit** for a service. The Service Details page opens.

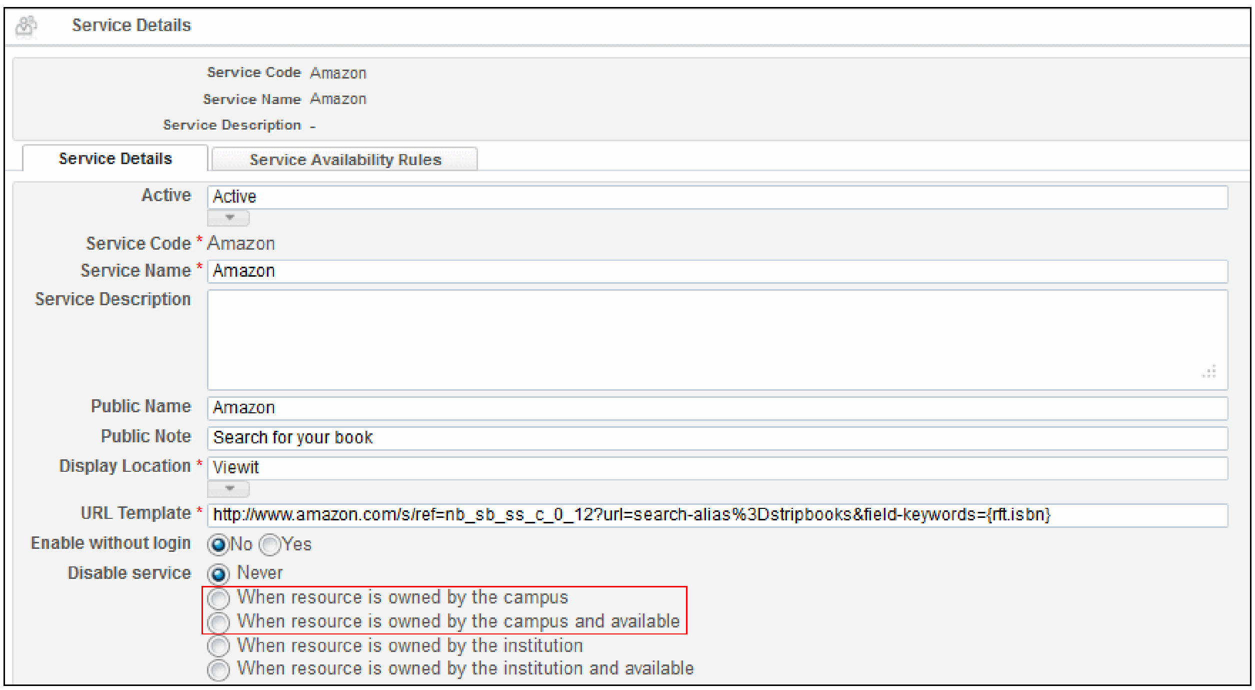


Figure 41 – Service Details Page

2. In the **Disable service** section:

   - Select **When resource is owned by the campus** to disable the service when physical items for the resource are owned by the campus.

   - Select **When resource is owned by the campus and available** to disable the service when physical items for the resource are owned by the campus and are available (that is, they are not involved in a process).

   The selected service is displayed or hidden accordingly in Primo Get It/View It tabs.

You can also disable resource sharing services based on self ownership at the requesting patron's campus in the following places:

- When creating a display logic rule for a resource sharing request (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Display Logic Rules**, click **Add Rule** and select **Resource Sharing Request** in the **hide service** field. The campus options display in the **with** field drop-down list).

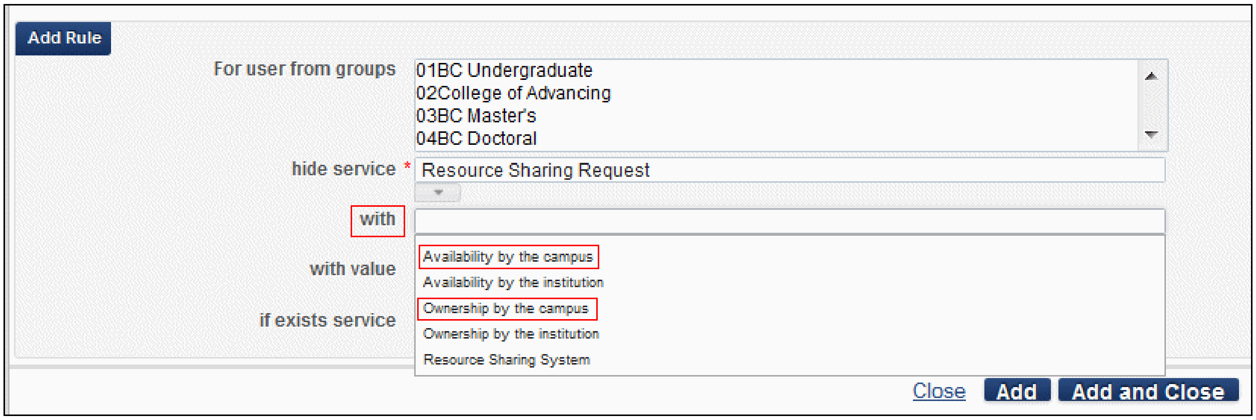


Figure 42 – Add Rule Dialog Box — Hide Resource Sharing Request by Campus Options

- When modifying an NCIP partner (**Fulfillment > Resource Sharing > Partners**, select **Actions > Edit** for an NCIP partner, and click the **Parameters** tab).

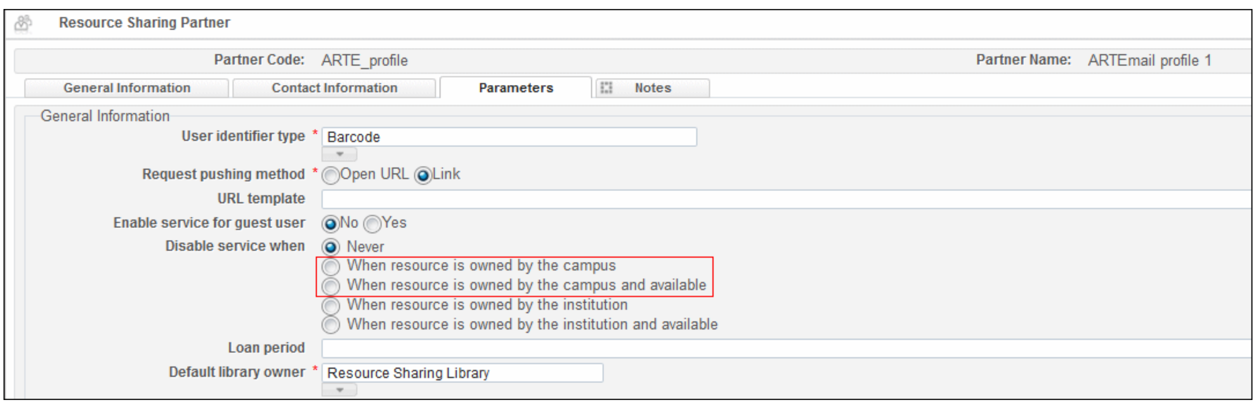


Figure 43 – Resource Sharing Partner Parameters Tab

Note: When a guest user or a user without a configured campus performs any of these activities, Alma disables/hides the service based on a self-ownership check done on the institution level.

Enhancements to the Export Requests to Remote Storage Job

Description

This feature enables you to specify the request types to be exported when integrating Alma with a remote storage system. You can specify different request types for scheduled and manual export jobs.

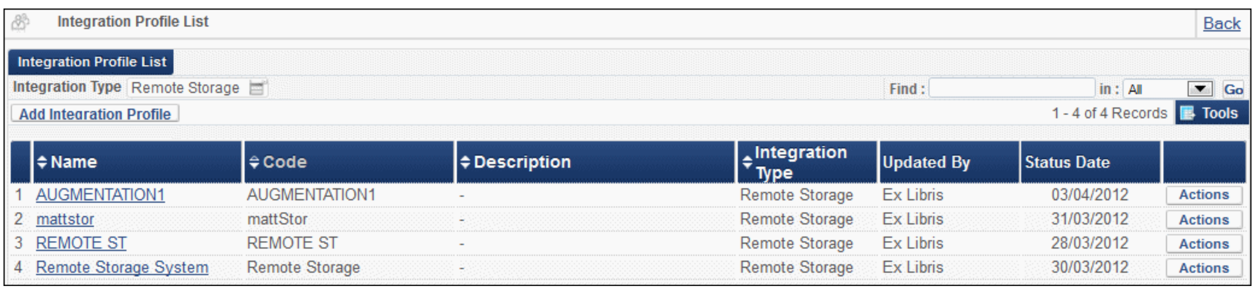
Technical Instructions

The following role can specify request types to be exported when integrating Alma with a remote storage system:

- General System Administrator

To specify request types to be exported when integrating Alma with a remote storage system:

1 On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), filter the list so that **Integration Type = Remote Storage**.



Integration Profile List — Back

Integration Profile List

Integration Type: Remote Storage — Find: — in: All — Go

Add Integration Profile — 1 - 4 of 4 Records — Tools

	Name	Code	Description	Integration Type	Updated By	Status Date	
1	AUGMENTATION1	AUGMENTATION1	-	Remote Storage	Ex Libris	03/04/2012	Actions
2	mattstor	mattStor	-	Remote Storage	Ex Libris	31/03/2012	Actions
3	REMOTE ST	REMOTE ST	-	Remote Storage	Ex Libris	28/03/2012	Actions
4	Remote Storage System	Remote Storage	-	Remote Storage	Ex Libris	30/03/2012	Actions

Figure 44 – Integration Profile List Page

2 Select **Actions > Edit** for a remote storage integration profile and click the **Actions** tab. The External System Actions tab opens.

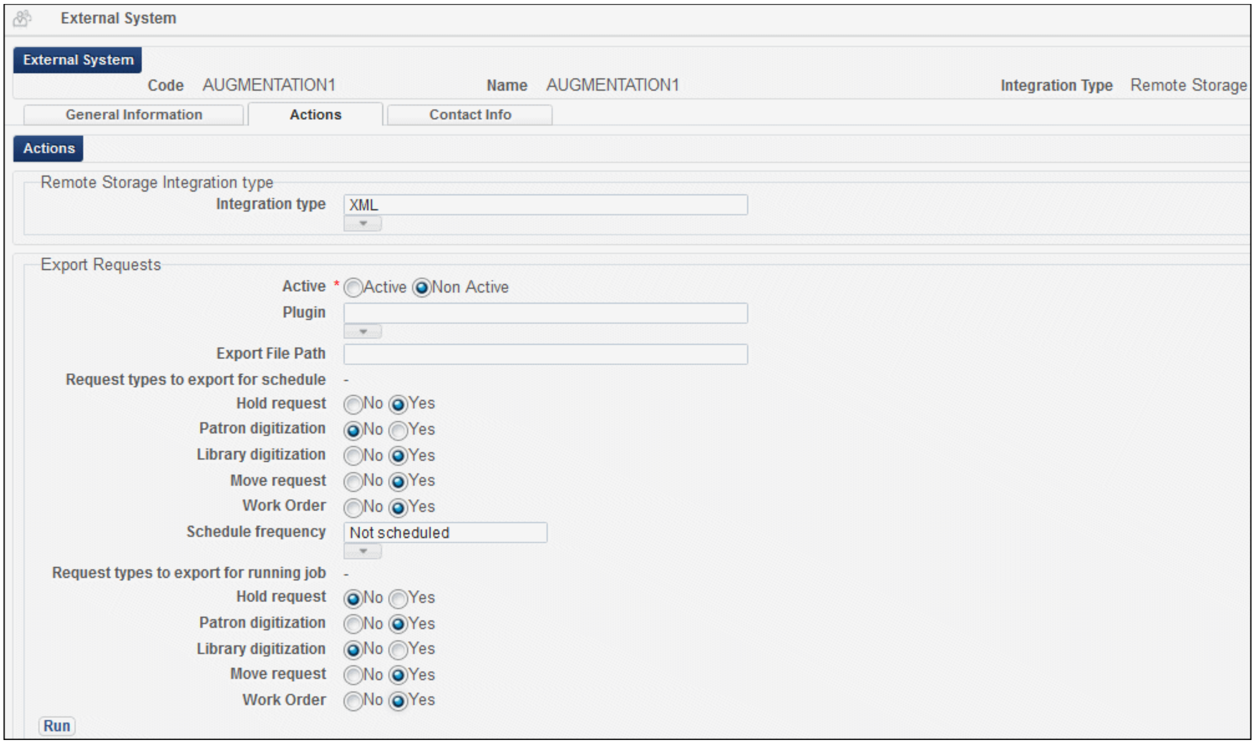


Figure 45 – External System Page – Actions Tab

3. Under **Request types to export for schedule**, select **Yes** for the request types you want to export with scheduled integration profile export jobs.

   In the **Schedule frequency** field, select the frequency by which the export job is to run.

4. Under **Request types to export for running job**, select **Yes** for the request types you want to export with manually run integration profile export jobs.

When the job is run, one barcode is sent per request, and the following new fields are displayed in the XML:

- Shipping Address of the target pickup location or requesting partner if the request is a resource sharing request
- MMS ID
- Item ID
- Library Code of the Target Pickup Location

The item that is automatically selected by the system is marked as **Not Available**, with **Process Type = Requested**.

Other Fulfillment Enhancements

- The following facets are now displayed on the Pickup Requested Resources page (**Fulfillment > Resource Requests > Pick From Shelf**) and on the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**):
    - **Request Printed** — Filters the list by displaying the requests for which a slip has been printed.
    - **Request Reported** — Filters the list by displaying the requests which have been included in a Slip Report (that is, the **Print Slip Report** button was selected for these requests).

Administration

The following sections describe the functions provided for the Administration functional area in the August 2014 release of Alma.

Modifications to the Run a Job Wizard

The **Source type** filter, which enables you to filter jobs according to the following, has been added to the Run a Job wizard (**Administration > Manage Jobs > Run a Job**):

- **All** – All jobs are displayed.
- **System Defined** – Jobs created by Ex Libris and available out-of-the-box are displayed.
- **User Defined** – Jobs created by the customer are displayed.

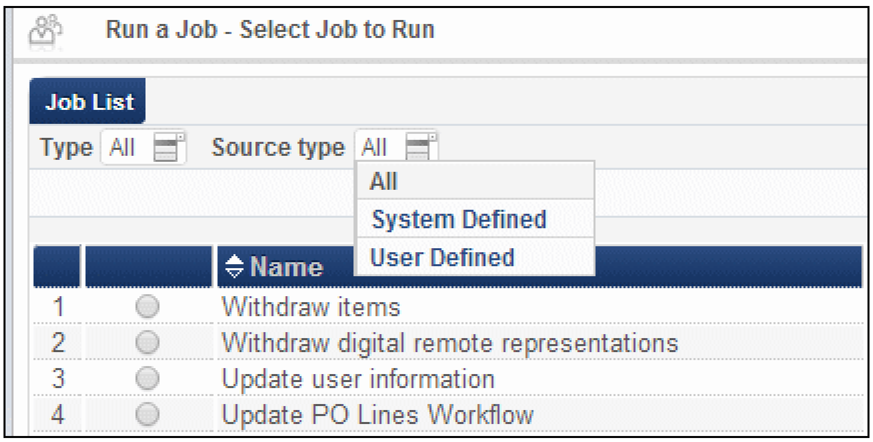


Figure 46 –Source Type Filter

In addition, the title on the pages of the wizard has been changed to **Run a Job**.

Type Added to User Statistics

Description

In addition to defining user record category types, you can also define user record statistic types, and you can map each statistic type to a list of categories. When attaching a category type to a user record, you can now assign the proper statistic type.

Technical Instructions

The following roles can create statistical types and category types to match statistical categories with statistical types:

- User Administrator
- General System Administrator

The following roles can attach statistical categories with matching types to user records:

- User Manager
- Circulation Desk Operator
- Circulation Desk Manager

To create statistical types:

1. On the User Statistical Types Code Table page (**Administration > User Management Configuration > Configuration Menu > User Details > Statistical Types**), locate the **Create a New Code Table Row** section at the bottom of the page.

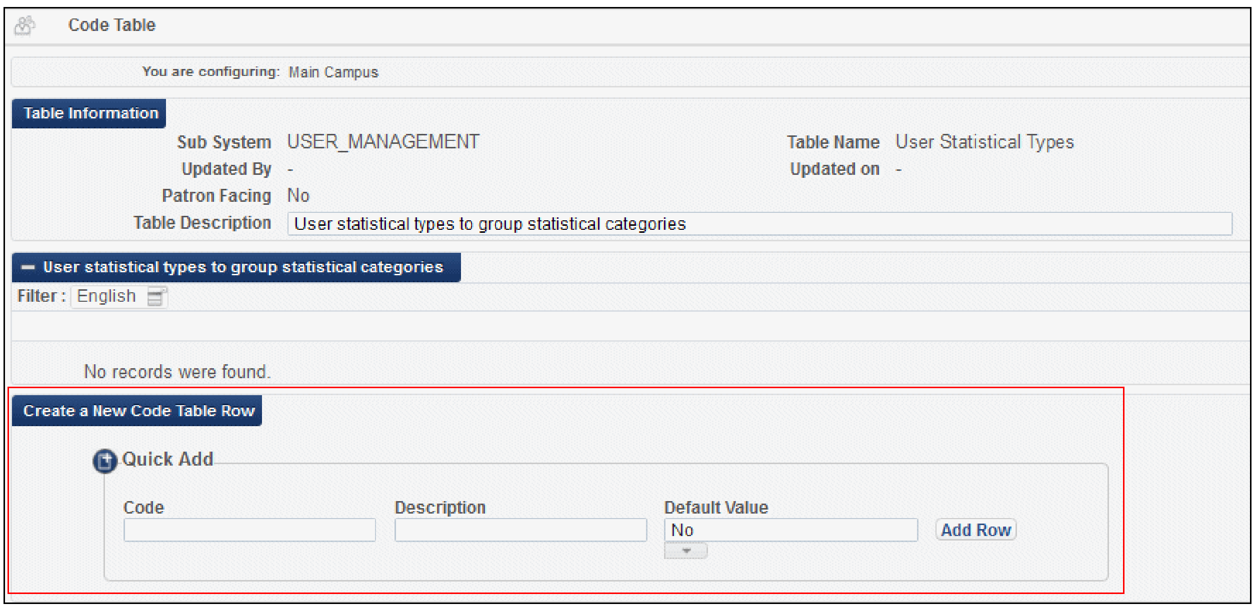


Figure 47 – User Statistical Types Code Table Page – Create a New Code Table Row Section

2. Enter a code and description in the relevant fields, and click **Add Row**. The value displays in the **User Statistical Types to Group Statistical Categories** section.

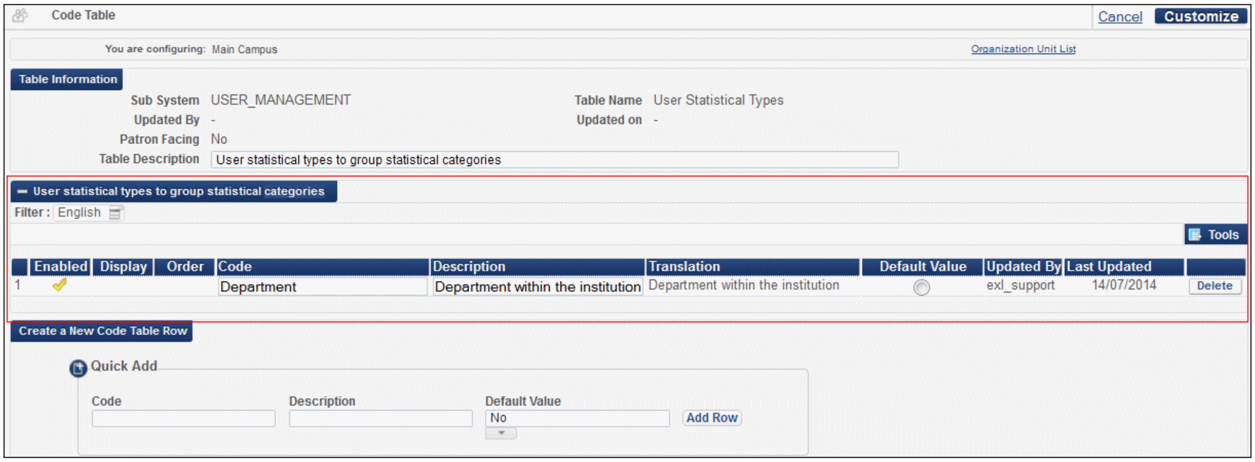


Figure 48 – User Statistical Types Code Table Page – Statistical Type Added

3 Click **Save**.

To assign category types to their relevant statistical types:

1 On the StatisticalCategoriesTypes Mapping Table page (**Administration > User Management Configuration > Configuration Menu > User Details > Category Types**), locate the **Create a New Mapping Row** section at the bottom of the page.

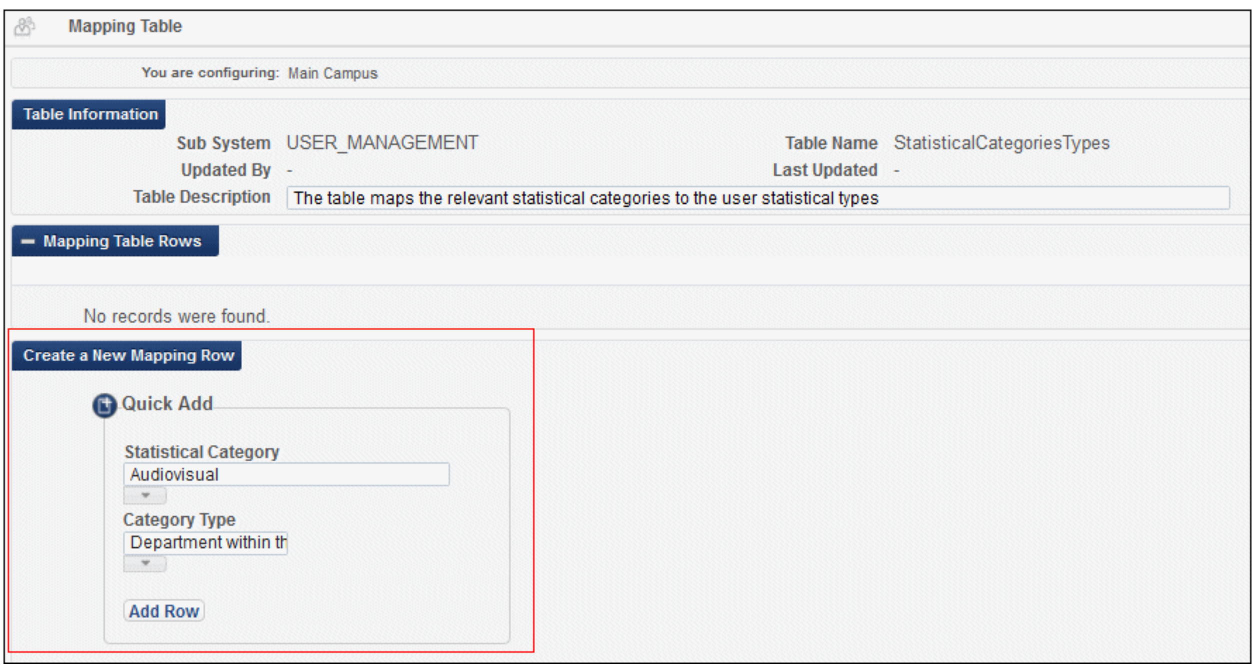


Figure 49 –StatisticalCategoriesTypes Mapping Table Page – Create a New Mapping Row Section

2 Map a statistical category to a category type by selecting values in the relevant fields and click **Add Row**. The value displays in the **Mapping Table Rows** section.

3 Click **Save**. The statistical categories are matched (mapped) to the statistical types, as specified by the category types.

To assign a user record to a Statistical Category and Type:

1 On the Find and Manage Users page (**Administration > User Management > Find and Manage Users**), select **Actions > Edit** for a user. The User Details page opens.

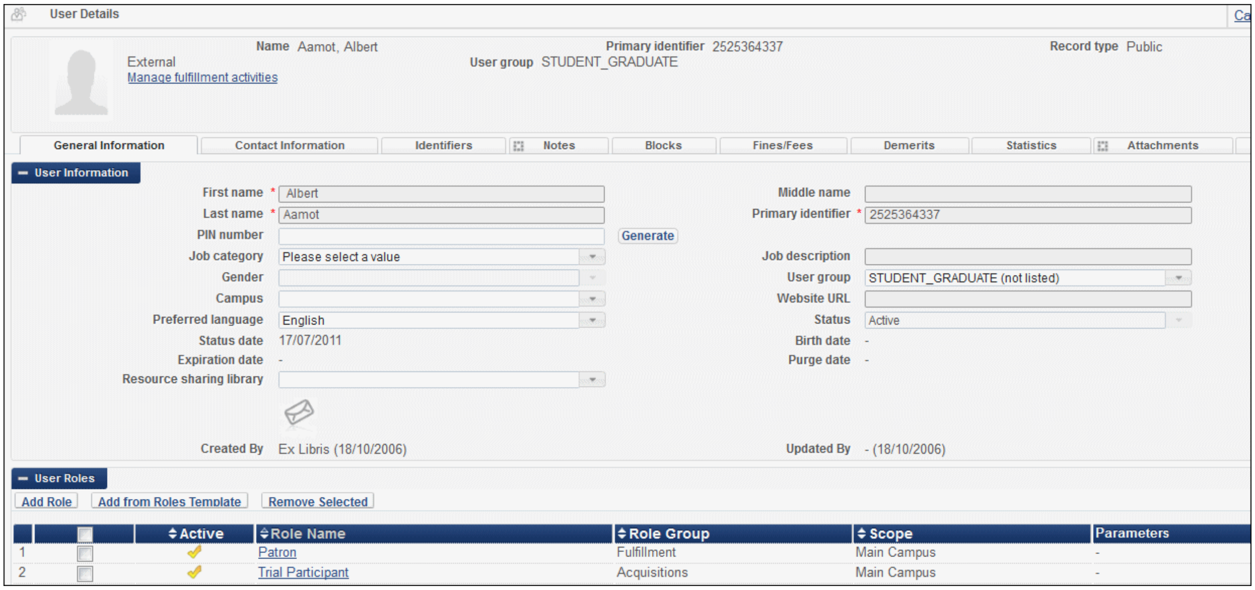


Figure 50 – User Details Page

2 On the **Statistics** tab, click **Add Statistic**. The Add Statistic dialog box opens.

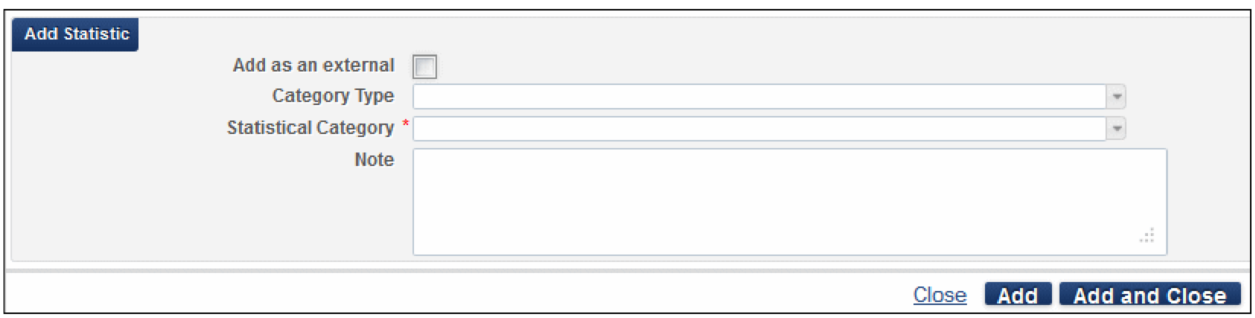


Figure 51 – Add Statistic Dialog Box

3 In the **Category Type** field, select a category type from configured category types.

4 In the **Statistical Category** field, select a statistical category, displayed according to the selected category type.

5 Click **Add** to add the statistic and enable adding another statistic, or click **Add and Close** to add the statistic and close the **Add Statistic** dialog box and return to the Statistics tab page.

Resource Sharing

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

Manage Patron Renewal Request

Description

This feature enables a patron to request renewal of resource sharing items.

Technical Instructions

The following roles can configure a workflow profile to support patron renewal:

- General System Administrator
- Fulfillment Administrator

The following roles can renew a patron's loan:

- Circulation Desk Operator
- Circulation Desk Manager

To enable a patron to request renewal of resource sharing items:

1. On the Workflow Profiles page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**), select **Actions > Edit** for a profile of **Type = Lending**. The Edit Workflow Profile dialog box opens.

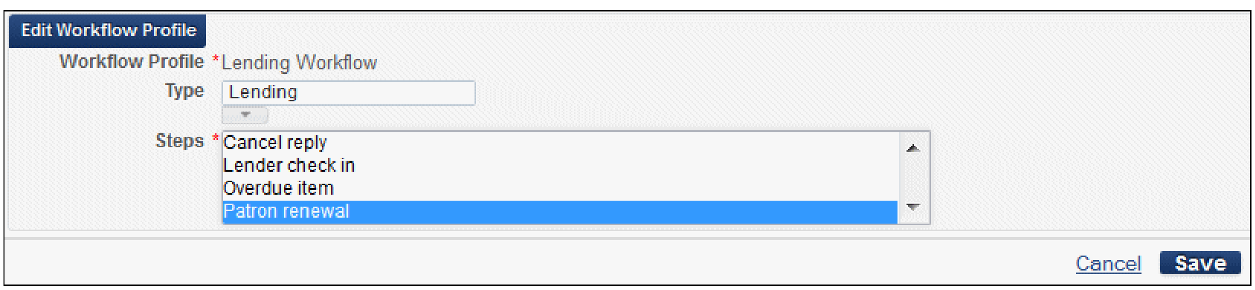


Figure 52 – Edit Workflow Profile Dialog Box

2. In the **Steps** field, select **Patron renewal**.
3. Click **Save**.
4. Verify that the **Is Renewable** policy value in the relevant Terms of Use is set to **Is Renewable**.

To request renewal for a patron:

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

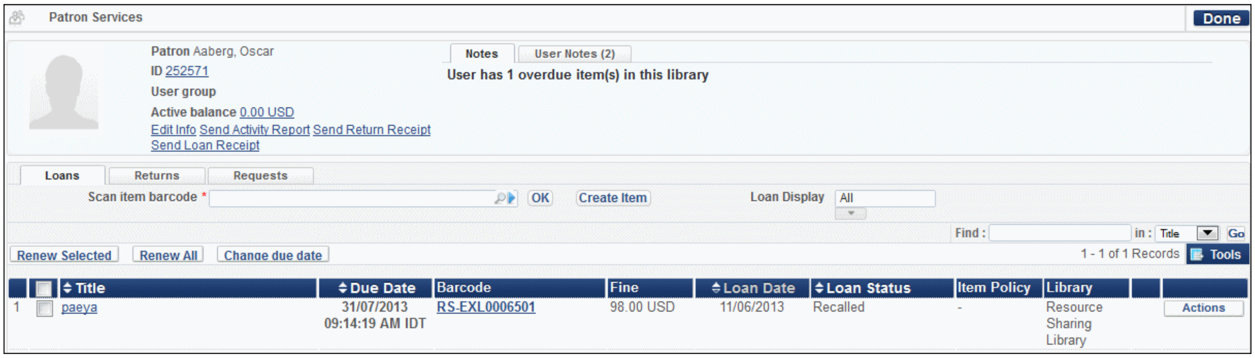


Figure 53 – Patron Services Page

2 In the **Loan display** field, select **All**. All of the patron's loans are displayed in the table.

3 Select **Actions > Renew** for the loan you want to renew. A renewal confirmation message displays at the top of the page.

Renewal requests may either be effective immediately or require a response from the lender side, depending on whether the **Renewal Response** action has been activated in the relevant Lending workflow profile.

- If **Renewal Response** has not been activated, the renewal is effective immediately, and the due date will be changed.
- If **Renewal Response** is activated, the renewal does not take place immediately. Instead, the borrower must wait for a response from the lender. If the lender approves the renewal request, then a **Renew** action must be activated by the Resource Sharing staff on the Resource Sharing Borrowing Requests task list page.

Note: If **Patron Renewal** is added to the workflow profile, then the patron can request renewals from the Primo loan list. Renewal is possible only if allowed by the loan's terms of use, as it is for non-resource sharing related loans.

Analytics

The following section describes the functions provided for Analytics in the August 2014 release of Alma.

Fields Added to PO Line Dimension

Description

The following fields have been added to the PO Line dimension in all subject areas in which it appears.

- Order Line Type
- Reporting Code and Reporting Code Description
- Invoice Status

Technical Details

The Design Analytics role can access this enhancement.

To access this feature:

Select, for example, **Funds Expenditure > PO Line**:

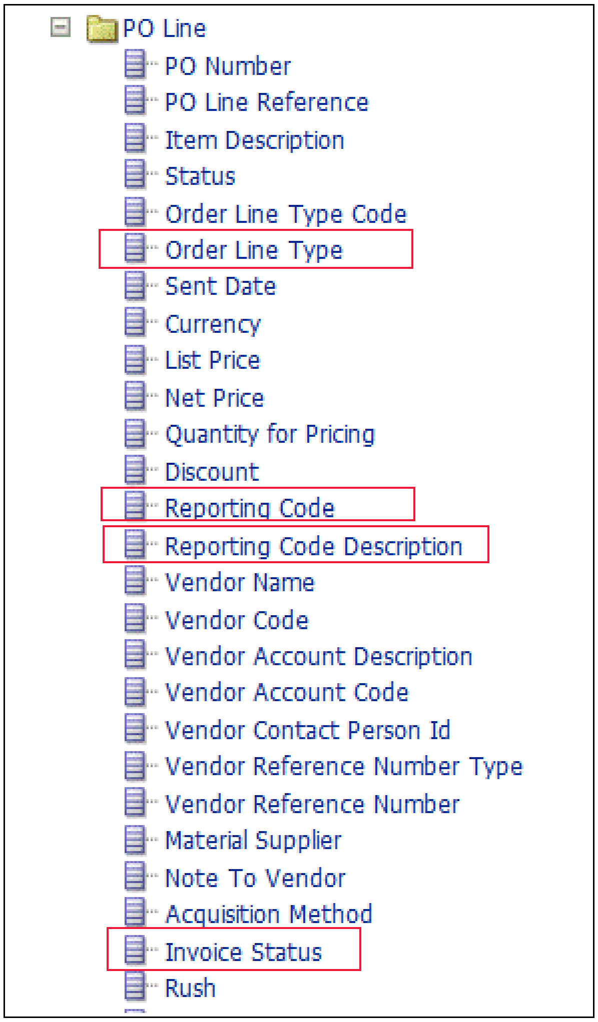


Figure 54 – PO Line-New Fields

The following is an example of a report using the new fields added in this release:

PO Line Reference	Order Line Type Code	Order Line Type	Invoice Status	Reporting Code	Reporting Code Description
.01101-18104	PRINT_OT	Physical - One Time	Fully invoiced	-1	None

The following is the source of the new fields on the PO Line Summary page:

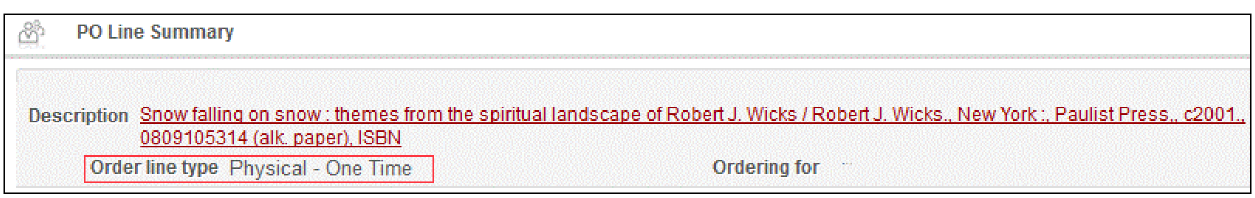


Figure 55 – PO Line Summary – Order Line Type

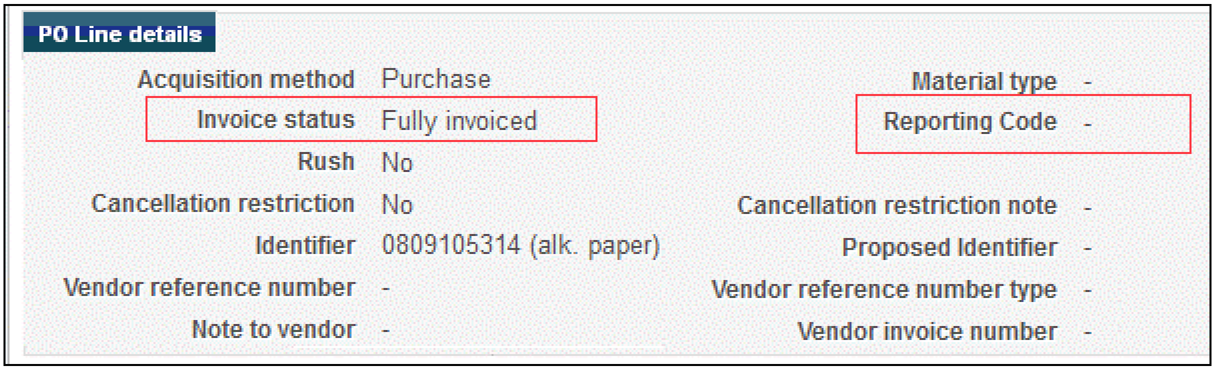


Figure 56 – PO Line Summary – Invoice Status and Reporting Code

Enhancements to Analytics Scheduling Options

Description

Two important enhancements have been made to improve the report schedule capabilities:

- The report scheduling wizard has been enhanced so that reports saved in any folder are available for scheduling. This allows saving reports in many levels of sub-folders within analytics.
- Until now, reports set to be run on a schedule could be provided only in PDF format. From now on, users are able to select between PDF, Excel, and Text format. (Note that this is supported only for scheduled reports and not for scheduled dashboards, which are only available in PDF format.)

Technical Details

The Design Analytics role can access this enhancement.

To access these features:

From the Analytics Configuration Page (**Administration > Analytics > Configuration Menu > Analytics Object List**), click **Add New Analytics Object**. The following is displayed:

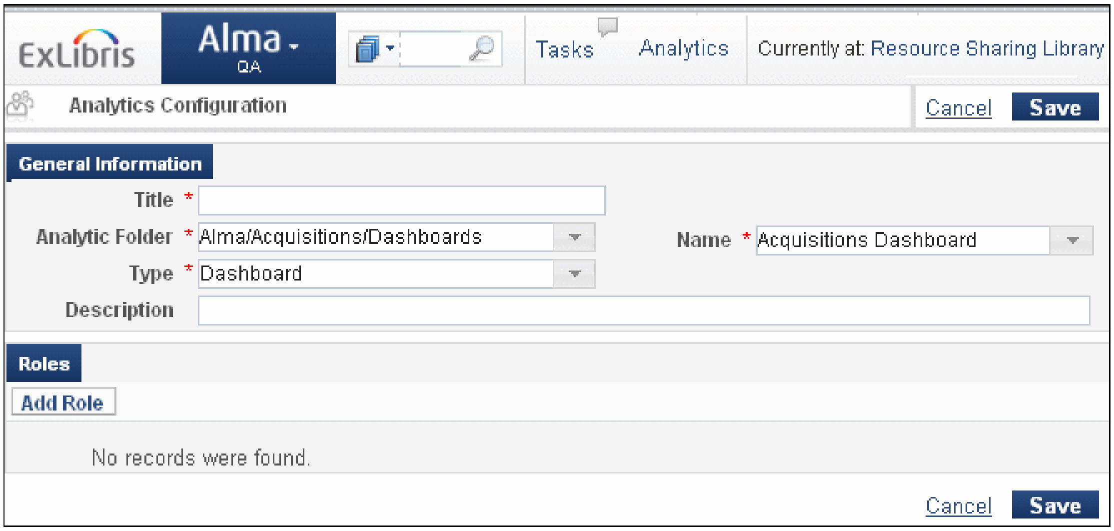


Figure 57 – Analytics Configuration

- All folders are now available from the **Analytics folder** drop-down list. Until now, only select folders were available from the **Analytics folder** drop-down list.
- When configuring scheduled reports (select **Scheduled Report** from the **Type** drop-down list), the new **Format** drop-down list is displayed and the following formats are now available. (Previously, only PDF was available, by default):
  - PDF
  - Excel (version 2003 – .xls format only)
  - Text

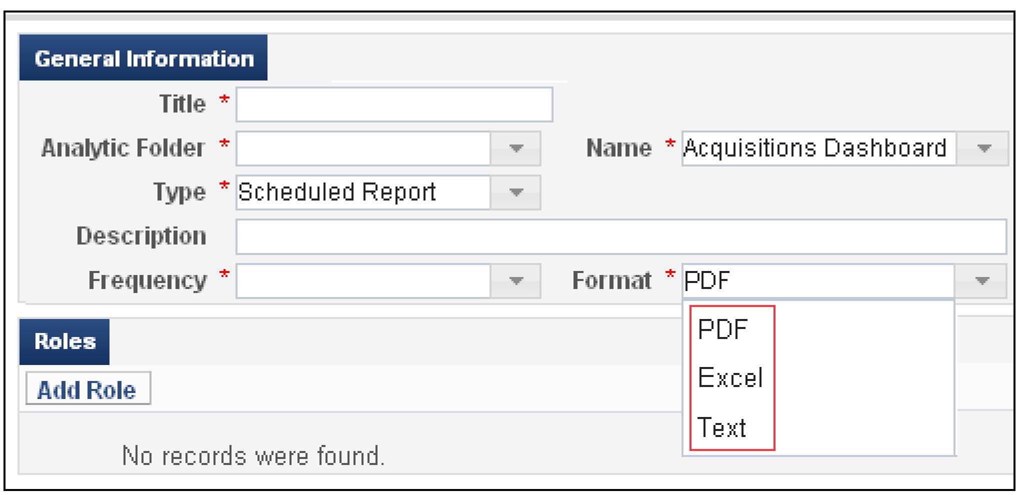


Figure 58 – Formats

- The **Frequency** field appears only when it is relevant, when **Scheduled Report** or **Scheduled Dashboard** is selected from the **Type** drop-down list, but not when selecting **Dashboard**, **Report**, or **Widget**.

Alma APIs

The following section describes the Alma API enhancements provided in the August 2014 release.

Alma RESTful APIs

For the August release, the `expand` parameter has been added to the Retrieve Bib Record API. This parameter allows expanding the bibliographic record with either physical inventory availability information or electronic inventory availability information.

For more information on this parameter, see https://developers.exlibrisgroup.com/alma/apis/bibs/GET/gwPcGly021om4RTvtjbPleCklCGxeYAf3JPdiJpJhUA=/af2fb69d-64f4-42bc-bb05-d8a0ae56936e

Collaborative Networks and Multicampus Institutions

The following sections describe Alma enhancements provided for collaborative networks and multicampus institutions in the August 2014 release.

Central License Negotiation

Description

This addition to Alma supports managing vendor license negotiations by the collaborative network central office on behalf of collaborative network members. The negotiation is managed in the Network Zone (NZ), where the central office creates a license of the type Negotiation, which includes:

1. Negotiation details:
   - Member for which the license is being negotiated
   - Member contact email
   - Price
   - Currency
   - License start/end date
   - Note
2. License content:
   - Electronic collections
   - Titles that are part of the negotiation

   The license content is managed centrally in the NZ electronic inventory with appropriate group settings representing the member for which the license content has been created.

   The license content should be associated with the central license.
3. License terms of use: managed in the central license.

Following the release of this feature, members for which the license was negotiated can purchase the centrally managed content according to the license's negotiated details.

Technical Details

The following example illustrates the setting up and managing of an NZ license for a member library.

The central office of the NZ negotiates a license for a vendor collection for its members Western State University and Eastern State University. The license contains negotiation details such as price per member, currency, start date, end date.

The following roles can manage a consortial license:

- License Manager (for the Network Zone)

To set up this license:

1. Log on to the NZ for your collaborative network (consortium).
2. From the Licenses and Amendments page (**Acquisitions > Acquisitions Infrastructure > Licenses**), click the **Add License** button.

   The License Details page opens to the Summary tab.
3. Enter information on the License Details page.

Note: See Adding a License in the *Alma Acquisitions Guide* or Alma online help for detailed information about the fields.

4. Because this is an NZ license, the field **License type** appears with two options, Negotiation or License. Select **Negotiation**.

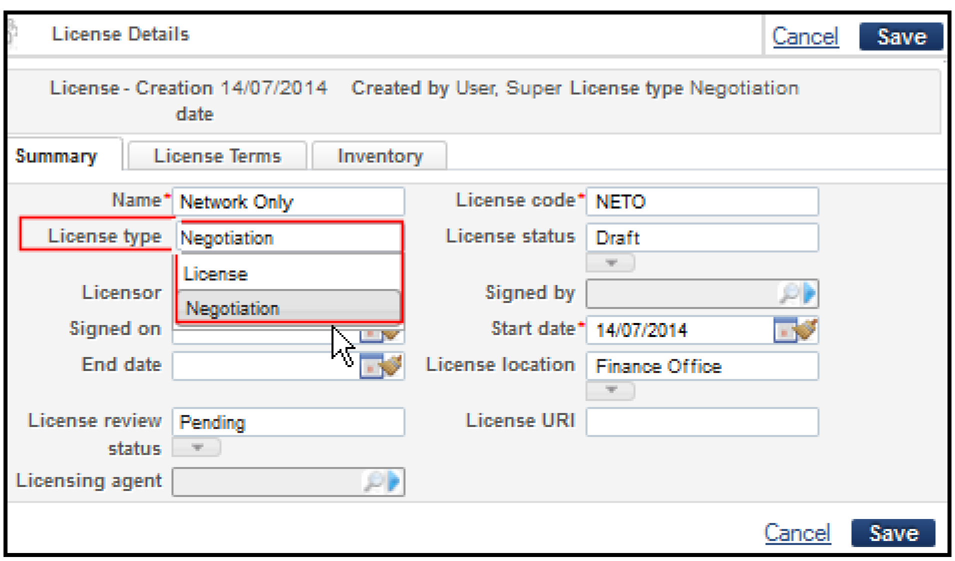


Figure 59 - License Type Fields for Network Zone

5. When you finish entering information in the fields, click **Save**. The license is saved and you are returned to the list of licenses.

6 Find the license you just created in the list.

7 Select **Actions > Edit** to open all the tabs of your license. You will notice a new tab, the **Negotiation Details** tab, as well as the standard tabs and fields for regular licenses.

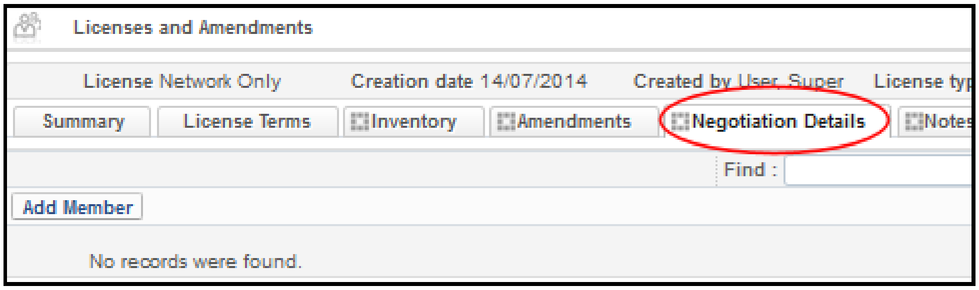


Figure 60 - Negotiation Details Tab for Network Zone License

To set the terms of the license, see Adding a License in the *Alma Acquisitions Guide* for detailed information about the tabs and fields.

To add members to the license:

1 From the Licenses and Amendments page, Negotiation Details tab (see above), click the **Add Member** button.

The Member Summary page opens.

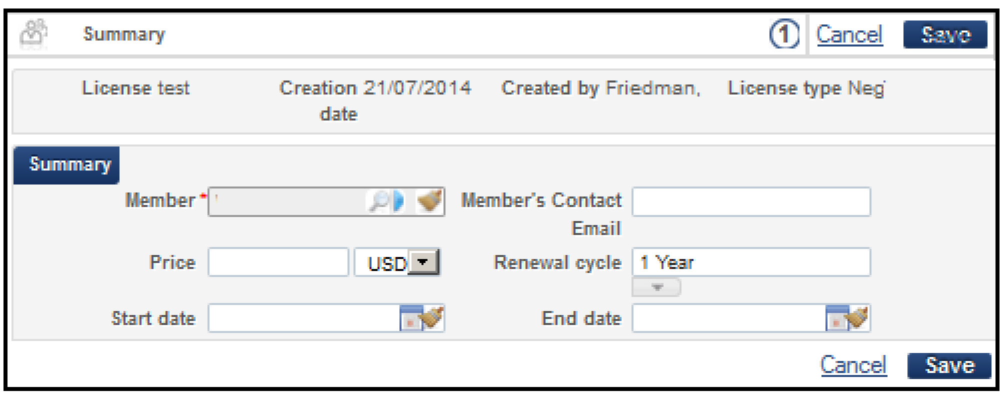


Figure 61 - Member Summary Page

2 To select a member institution, click the search or arrow icon in the **Member** field and choose an option from the list.

3 Enter any additional details for the license.

4 Click **Save**.

The Network Zone Setup page opens (two members added in the figure below).

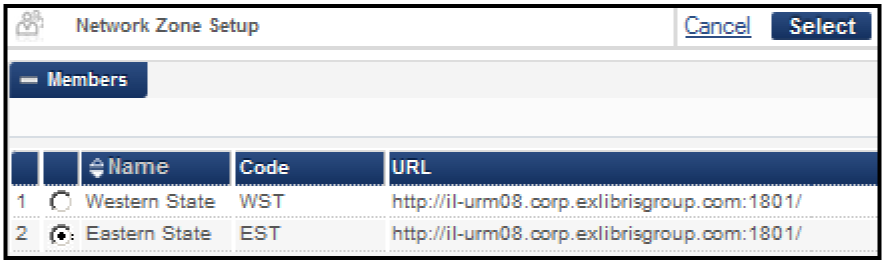


Figure 62 - Network Zone Setup

To complete the NZ setup, ensure that the vendor collection is associated with the appropriate group setting for Western and Eastern State as well as with the license. For information on working with group settings in a consortium, see Configuring Inventory Available For Management Groups for Collaborative Environments in the *Alma Collaborative Networks (Consortia) Guide* or Alma online help.

Central Management of Resource Sharing Partners

Description

This feature enables a daily scheduled job which distributes resource sharing partners to all institutions in a collaborative network. When the job runs, all partner fields (except Notes) are copied to the collaborative network institutions.

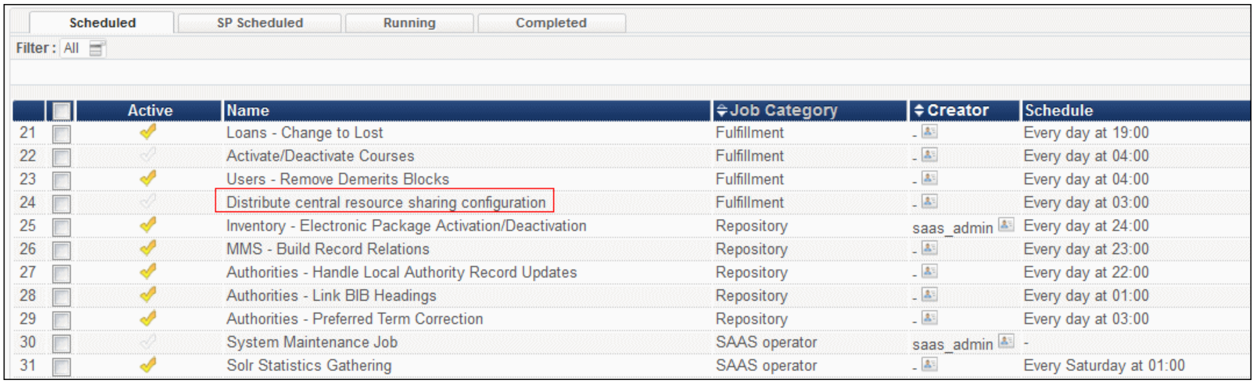
Technical Instructions

The following role can monitor the job which distributes resource sharing partners to institutions in a collaborative network:

- Requests Operator

To monitor the distribution of resource sharing partners to institutions in a collaborative network:

On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Scheduled** tab to view scheduled jobs. Locate the **Distribute central resource sharing configuration** job.



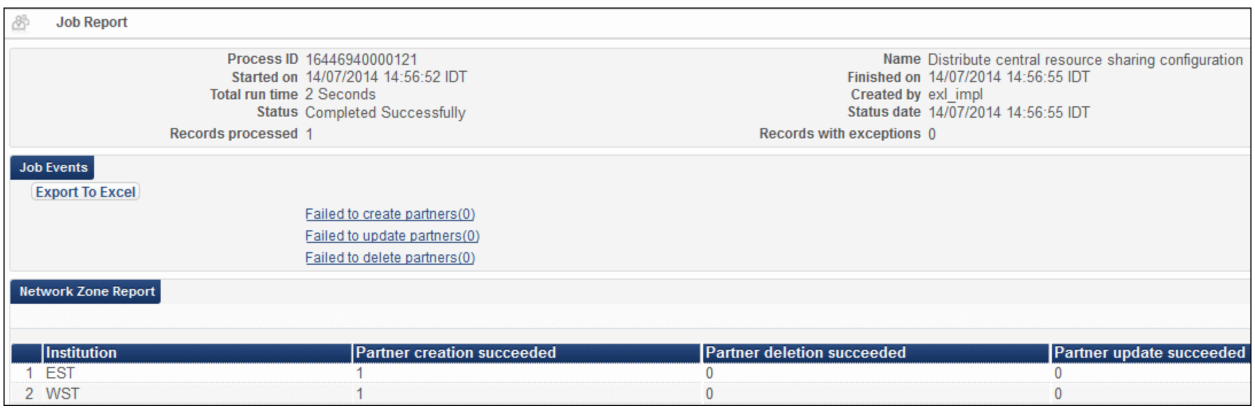
Scheduled | SP Scheduled | Running | Completed

Filter : All

		Active	Name	Job Category	Creator	Schedule
21		✓	Loans - Change to Lost	Fulfillment	-	Every day at 19:00
22			Activate/Deactivate Courses	Fulfillment	-	Every day at 04:00
23		✓	Users - Remove Demerits Blocks	Fulfillment	-	Every day at 04:00
24			Distribute central resource sharing configuration	Fulfillment	-	Every day at 03:00
25		✓	Inventory - Electronic Package Activation/Deactivation	Repository	saas_admin	Every day at 24:00
26		✓	MMS - Build Record Relations	Repository	-	Every day at 23:00
27		✓	Authorities - Handle Local Authority Record Updates	Repository	-	Every day at 22:00
28		✓	Authorities - Link BIB Headings	Repository	-	Every day at 01:00
29		✓	Authorities - Preferred Term Correction	Repository	-	Every day at 03:00
30			System Maintenance Job	SAAS operator	saas_admin	-
31		✓	Solr Statistics Gathering	SAAS operator	-	Every Saturday at 01:00

Figure 63 – Monitor Jobs Page – Distribute center resource sharing configuration job

After the job runs, you can view the completed job in the **Completed** tab and select **Actions > Report** to view the job's report.



Job Report

Process ID 16446940000121
Started on 14/07/2014 14:56:52 IDT
Total run time 2 Seconds
Status Completed Successfully
Records processed 1
Name Distribute central resource sharing configuration
Finished on 14/07/2014 14:56:55 IDT
Created by exl_impl
Status date 14/07/2014 14:56:55 IDT
Records with exceptions 0

Job Events

Export To Excel

Failed to create partners(0)
Failed to update partners(0)
Failed to delete partners(0)

Network Zone Report

	Institution	Partner creation succeeded	Partner deletion succeeded	Partner update succeeded
1	EST	1	0	0
2	WST	1	0	0

Figure 64 – Job Report Page – Completed Job

As the report indicates, the configured partners are distributed among the institutions that are members of the network.

Suppression of Bibliographic Records

Suppression of bibliographic records in collaborative networks is now handled as follows:

- **Suppress from Discovery** – If a record is suppressed on the network level, it is suppressed for all member institutions. If it is not suppressed on the network level, it may be suppressed by a member institution, on the institution level. In this case, the member's inventory is not included in the published NZ record.
- **Export to WorldCat/Libraries Australia** – Network-level settings are disregarded. Only member institution settings are taken into account. The **Export to WorldCat/Libraries Australia** settings must therefore be configured on the institution level and not the network level.

Alma Interface Updates

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

Information Icons Added

Description

An information icon has been added to the following pages in Alma.

- Transaction Details (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers > Edit Allocated Fund > Transactions Tab > Actions > View**)
- Electronic Task Details Summary Tab (**Resource Management > Manage Electronic Resource Activation > Actions > Edit**)
- User Template Details (**Administration > User Management Configuration > Configuration Menu > Roles and Registration > Role Templates > Actions > Edit**)
- Fund Details (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers > Edit**)
- Invoice/Invoice Line Details (**Acquisitions > Receiving and Invoicing > Search for Invoice/Review > Actions > Edit**)
- PO/PO Line Details (**Acquisitions > Search for PO Line/Review > Actions > Edit**)
- Vendor/Vendor Account/Vendor Interface Details (**Acquisitions > Vendors > Actions > Edit**)
- Analytics Objects List (**Administration > Analytics > Configuration menu > Analytics Object List > Actions > Edit**)

When clicking the icon, a pop-up opens, displaying created by, last updated by, and (where applicable) modified by information.

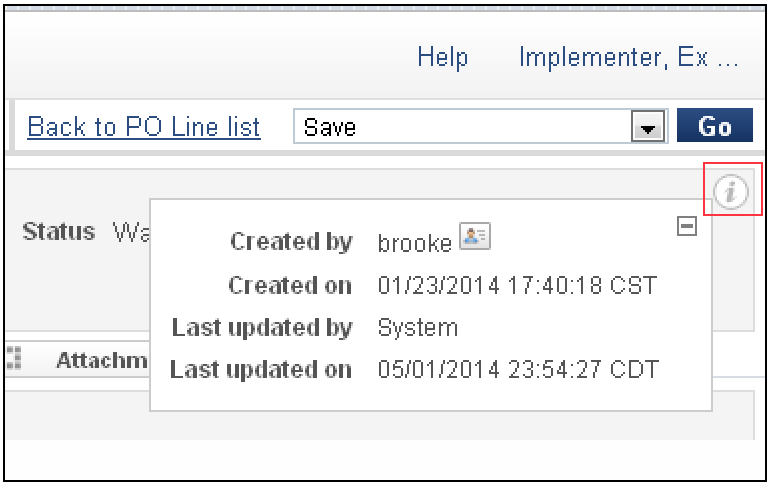


Figure 65 – Information Icon

Clicking the  icon next to the Created By field displays additional information:

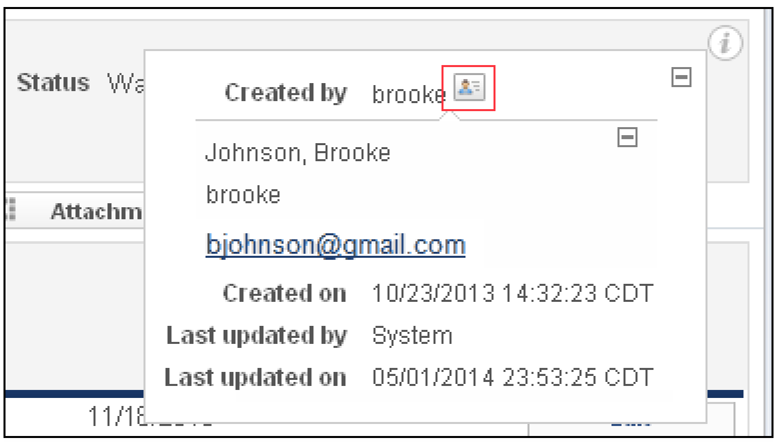


Figure 66 – Created By Information Icon

In addition, the **Created By** icon has been added to the **Creator** column of the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**).

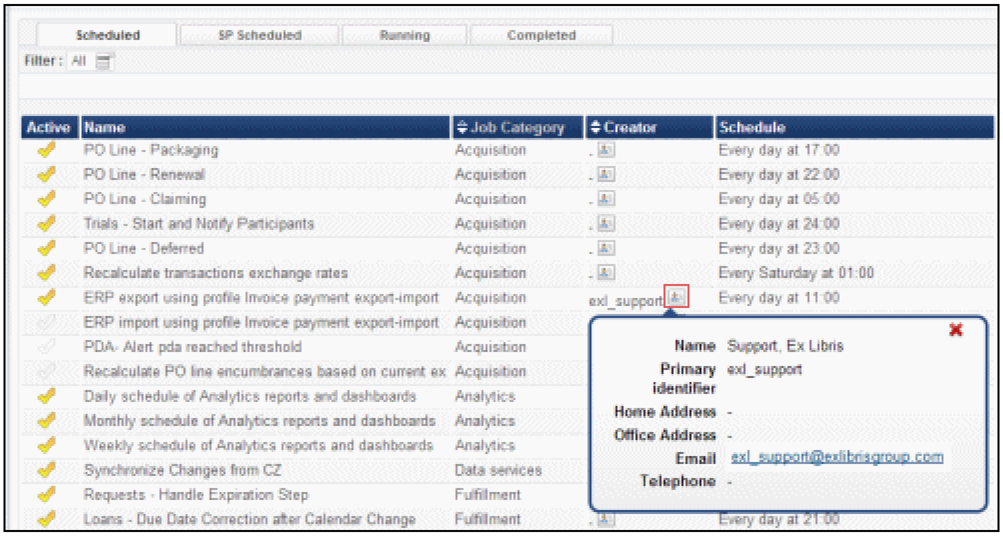


Figure 67 – Created By Information Icon

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.
- Exporting multiple records simultaneously using the OCLC Web application is not working as it should.
- In the repository search, switching between tabs (for example, Institution/ Community) before your search results are completely displayed may cause errors.