

Alma December 2014 release:  
**Wishing You a Happy Holiday Season**



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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 December 2014 Release Highlights](#)
- [Data Services](#)
- [Alma Show Me How and Videos](#)
- [Particular Issues to Note](#)
- Feature/enhancement descriptions for the respective Alma functional areas
  - [Acquisitions](#)
  - [Resource Management](#)
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  - [Administration](#)
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  - [Collaborative Networks and Multicampus Institutions](#)
- [Known Issues](#)

# Alma December 2014 Release Highlights

## Resource Management

- Overlap Analysis

The December release sees the eagerly awaited implementation of an overlap analysis report for electronic resources. When making acquisitions decisions, this option allows for comparing content of electronic collections in order to determine where there may be a subscription overlap.

- Publishing Profile Enhancements

Alma publishing to external sources has been enhanced to include publishing on an item or portfolio level. When this option is selected in the publishing profile, one bibliographic record will be published for each item/portfolio associated with the bibliographic record. This functionality is needed for integration with external sources such as the Hathi Trust.

- Norwegian Authority System (BARE) Contribution and Integration

Alma now provides support for the Norwegian Authority System (BARE) in the Community Zone (CZ). This new functionality also allows authorized contributing institutions to submit approved authority records to the BARE database and the Alma CZ, in this way providing seamless integration and end-to-end workflows directly from within Alma.

- Import Profile - Override/Merge Restrictions

The option **Do not override/merge a non-brief record with a brief record** parameter has been added to the Match Profile tab of the Import Profile Details page. This functionality provides additional control related to whether an imported record will be overlaid or merged.

- Due Date Added to Activation Tasks List

In order to provide better management control of the electronic activation task list, the operator can now add a due date to each electronic activation task.

## Fulfillment

- Hiding General Hold Requests for Physical Journals

The General Hold Request option enables users to place a request for a journal issue even if there is no physical item for the issue. Alma's **Display Logic Rules** now allow for hiding this service in Primo.

## Resource Sharing

- **Creating a Borrowing Request Using External Resources**

It is now possible to create a borrowing request for a resource that is cataloged in an external system (that is, outside of Alma and the current institution). This is achieved by searching for resources using an external search profile.

- **Manage Lender Expiration Settings**

An ISO partner's settings can be configured to determine when the partner's lending request will expire. In this case, the request will move on to the next partner in the rota (if one exists).

- **New Broker Integration Option with the Innovative INN-Reach Resource Sharing System**

Alma now supports NCIP-based integration with the Innovative INN-Reach resource sharing system as a broker for the resource sharing workflow. The workflow for working with a resource sharing request managed by an INN-Reach system is the same as the workflow when working with other NCIP integrated broker resource sharing systems.

## Administration

- **Delete User Policy Settings**

The Delete User Policy setting allows for configuring the system behavior when purging/deleting a user from Alma. It is possible to retain all of a user's data, retain only statistical data, or remove all data from the system, thus allowing for greater flexibility in maintaining reportable data and adherence to local/regional regulations.

- **Restrict Login to an Alma Institution Based on IP Addresses**

A new option has been implemented that will allow staff to log in only when on campus or off campus if they have access via VPN. Login access to Alma can now be restricted based on IP addresses. Two new links have been added to the General Configuration menu to cater for this development.

## Analytics

- **New Events – Z39 Searches Dashboard**

A new Z39 Searches dashboard is now available in Alma Analytics. This dashboard is used to display a report of the incoming Z39 searches conducted between selected dates.

- New Course Reserves Subject Area

A new Course Reserves subject area has been added to Alma Analytics.

- User Details Retained after Anonymization

Prior to the December release, all user information was deleted if an institution chose to anonymize patron information and activities. It is now possible to configure Alma to delete only specific information (for example, user ID) and retain the more general user information (for example, user group, job category).

- Enhancements to a Number of Subject Areas

A number of additional fields have been added to the E-Inventory, Users, and Fund Expenditure subject areas.

## Collaborative Networks and Multicampus Institutions

- Defining Display Logic Rules at the Campus Level

It is now possible to define display logic rules at the campus level in multicampus environments for electronic services such as full text, selected full text, database services, and general electronic services.

- Central Network Zone Managed Resource Sharing Configurations

A number of resource sharing settings can now be centrally configured in the Network Zone and automatically distributed to network members. Once distributed to the institutions, these configuration components display at each institution with a scope value of Network.

- Processing of IZ-Activated Electronic Resources Enhanced to Prevent Duplication in the NZ

Processing of Institution Zone (IZ) activated electronic resources has been enhanced to ensure that there are no duplicate bibliographic records in the Network Zone and that the correct NZ **held by** information is preserved.

## Alma APIs

- Alma RESTful APIs

A number of enhancements were added to the Create Order API; a Search Order API was added, enabling the search for a PO line via API; and the Cash and User Loans Web services were moved to RESTful APIs, including the option to renew loans using the RESTful Web service.

# Data Services

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

## New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma CZ during the period 2 November 2014 through 30 November 2014:

- Begell eBooks Platform
- CCC Get It Now: American Psychiatric Association
- CCC Get It Now Annual Reviews
- CCC Get It Now Project HOPE/Health Affairs Journal
- CCC Get It Now MIT Press
- CCC Get It Now Pion Limited
- CCC Get It Now IOS Press
- CCC Get It Now MA Healthcare
- CCC Get It Now Slack
- CCC Get It Now: Spandidos
- CCC Get It Now Taylor and Francis
- CCC Get It Now: University of California Press
- CCC Get It Now Wolters Kluwer
- Chinese Electronic Periodical Service Conference Proceedings (Airiti Library)
- Harmatheque Books
- ProQuest Historical Newspapers: South China Morning Post (1903-1995)
- Sage CRKN Collection
- Springer Link Books Computer Science And Engineering German Archive
- Vandenhoeck And Ruprecht Abhandlungen Zur Musikgeschichte
- Vandenhoeck And Ruprecht Angewandte Psychologie Erwachsene
- Vandenhoeck And Ruprecht Angewandte Psychologie Kinder
- Vandenhoeck And Ruprecht Arbeiten Zur Geschichte Des Pietismus

- Vandenhoeck And Ruprecht Arbeiten Zur Kirchlichen Zeitgeschichte
- Vandenhoeck And Ruprecht Arbeiten Zur Pastoraltheologie, Liturgik Und Hymnologie
- Vandenhoeck And Ruprecht Arbeits Und Organisationspsychologie
- Vandenhoeck And Ruprecht Complete
- Vandenhoeck And Ruprecht Formen Der Erinnerung
- Vandenhoeck And Ruprecht Forschungen Zur Kirchen Und Dogmengeschichte
- Vandenhoeck And Ruprecht Forschungen Zur Religion Und Literatur Des At Und Nt
- Vandenhoeck And Ruprecht Forschungen Zur Systematischen Und Ökumenischen Theologie
- Vandenhoeck And Ruprecht Grundrisse Zum Alten Und Zum Neuen Testament
- Vandenhoeck And Ruprecht Historische Semantik
- Vandenhoeck And Ruprecht Hypomnemata UND Hypomnemata Supplement
- Vandenhoeck And Ruprecht Journal Of Ancient Judaism Supplements
- Vandenhoeck And Ruprecht Jüdische Religion, Geschichte Und Kultur
- Vandenhoeck And Ruprecht Kirche-Konfession-Religion
- Vandenhoeck And Ruprecht Kritische Studien Zur Geschichtswissenschaft
- Vandenhoeck And Ruprecht Kritisch-Exegetischer Kommentar Ueber Das Neue Testament
- Vandenhoeck And Ruprecht Neue Studien Zur Philosophie
- Vandenhoeck And Ruprecht Neues Testament Deutsch 2 Neubearbeitung
- Vandenhoeck And Ruprecht Neueste Geschichte / Zeitgeschichte
- Vandenhoeck And Ruprecht Novum Testamentum / Studien Zur Umwelt Des Nt
- Vandenhoeck And Ruprecht Research In Contemporary Religion
- Vandenhoeck And Ruprecht Schriften D. Sigmund-Freud-Inst. Reihe 1: Klinische  
Vandenhoeck And Ruprecht Psychoanalyse: Depression
- Vandenhoeck And Ruprecht Schriften Des Hannah-Arendt-Instituts
- Vandenhoeck And Ruprecht Studien Zum Althochdeutschen
- Vandenhoeck And Ruprecht Super Alta Perennis. Studien Zur Wirkung Der Klassischen Antike
- Vandenhoeck And Ruprecht Tragicorum Graecorum und Romanorum Fragmenta
- Vandenhoeck And Ruprecht Wilhelm Dilthey, Gesammelte Schriften

## New External Resources That Are Open for Searching

The following external resources will be available as of November 30th:

- KERIS (Korea Education and Research Information Service) – Uses idPass authentication.
- NUKAT – Uses idPass authentication
- United States National Agricultural Library
- UNILINC Network Zone

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**Note:** With the December release, the Community Zone now includes the Māori Subject Headings. For more information, see <http://mshupoko.natlib.govt.nz/mshupoko/>. In addition, the Community Zone is now enriched with bibliographic records from Thieme, adding 1015 full bibliographic records to the Community Zone.

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# Alma Show Me How and Videos

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

## Alma Show Me How – December

### 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 December release, the following Show Me How scenarios are available:

- ILL: Locate Borrowing Item in an External Catalog
- Electronic Collection Overlap Analysis
- Assign a PDA to a Set of Electronic Portfolios
- BIB Import: Prevent Override by Brief Records

The following pop-ups are also available:

- New: Manually Assign a PDA to a Portfolio (search for any electronic portfolio, then select **Edit > Portfolio Information**)
- New: E-Resource Activation Task Due Date (select **Manage Electronic Resource Activation** from the main Alma menu)

## Alma Videos – December

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

- Assign a PDA to Electronic Portfolios
- Course Reserves Subject Area
- Due Date Added to Activation Tasks List
- Creating a Borrowing Request Using External Resources
- Electronic Collection Overlap Analysis
- Import Profile: Prevent Overlay by Brief Record

# Particular Issues to Note

The following issues should be noted:

- There has been a change in the attributes that are supported by Alma for the Z39.50 protocol. Previously, the value 1211 of the **Use** attribute searched for all other system numbers (including CKB, for example) and not only the OCLC number. The value 12 of the **Use** attribute searched for Alma identifiers, such as MMS\_ID. As of the December release, the value 1211 of the **Use** attribute searches for the OCLC number only, and the value 12 of the **Use** attribute searches for both Alma identifiers and other system numbers.

For example, a search for the CKB number using the value 1211 for the **Use** attribute, which previously worked, does not work as of the December release. The value 12 of the **Use** attribute should be used instead. A search for the OCLC number now works using both the 12 and the 1211 values of the **Use** attribute.

For detailed information on the Z39.50 protocol, see <https://developers.exlibrisgroup.com/alma/integrations/Z39.50>.

- As indicated in the Alma UI and in previous versions of the Alma release notes, only the new XSD format will be supported for invoice export as of January 2015. Version 1 of the XSD format will be deprecated with next month's release.
- In addition, as indicated in the Alma UI and in previous versions of the Alma release notes, the following PO line types will be removed from Alma as of the January 2015 release:
  - Electronic Book Package – Subscription
  - Electronic Journal Package – Subscription
  - Electronic Journal Package - One Time
  - Database - One Time
  - Database – Subscription

# Acquisitions

The following sections describe the features provided for the Acquisitions functional area in the December 2014 release of Alma.

## Enhancements to Support the Receiving of Continuous Orders

### Description

For the January release, a development will be implemented that allows the creation of all the item records of a continuous order for one cycle in the Received Items list as part of the prediction pattern support. In anticipation of this development, the following enhancements have been implemented for the December release, currently enabling the more efficient management of items:

- A **Receiving status** drop-down list has been added that allows you to filter the list of PO line items according to whether they are Received or Not Received. Note that an item with Not Received status means that the item has no received date.
- The **Date Received** column has been added to the PO Line Items list.
- The **Filter** drop-down list has been renamed **Location**.
- The sort routine, **Receiving Date**, has been added.
- The **Save and Receive** button has been added that allows you to save and receive multiple items.

### Technical Instructions

The Receiving Operator role can access this enhancement.

#### To access this feature:

Open the Received Items List (**Acquisitions > Receiving and Invoicing > Receive > Continuous tab > Actions > Manage Items** (for a PO line)).

The following is displayed:

Alma OA

Tasks Analytics Currently at: Law Library - LAW Ac.. Help Implementer, Ex ...

Received Items List Back Save Save and Receive

Description Pocketparts & Supplements - CALL # LABEL - Restatement of the law, second, property, 2d : landlord and tenant. American Law Institute, 1977... ISSN  
 Status Waiting for Renewal (2013-08-19) Order line type Physical - Subscription PO Line Owner Law Library Sent Date 08/19/2013

**Bibliographic Information**

Title Pocketparts & Supplements - CALL # LABEL - Restatement of the law, second, property, 2d : landlord and tenant.  
 Identifier - Identifier Type ISSN  
 Vendor's Title Number - Publication Place St. Paul, Minn.  
 Publisher American Law Institute Publication Date 1977.  
 Frequency - Start/End -  
 Language eng

**PO line Items**

Receiving note Barcode front of supplements  
 Sort routine Receiving date

Receiving status Received Location All

Receive New Items 1 - 5 of 5 Records Tools

	Library	Location	Temp Loc	Date Received	Modified	Call Number	Barcode	Description	Current Step	
1	Law Library	Restatements	No	08/19/2013	06/21/2014	KF590 .R47 1977		Pocketparts 2013	-	Edit Inventory
2	Law Library	Annex Reference	No	08/19/2013	06/21/2014	KF590 .R47 1977		Pocketparts 2013	-	Edit Inventory
3	Law Library	Faculty Library	No	08/19/2013	06/21/2014	KF590 .R47 1977		Pocketparts 2013	-	Edit Inventory
4	Law Library	Restatements	No	04/10/2014	06/21/2014	KF590 .R47 1977		Pocketparts 2014	-	Edit Inventory
5	Law Library	Annex Reference	No	04/10/2014	06/21/2014	KF590 .R47 1977		Pocketparts 2014	-	Edit Inventory

Back Save Save and Receive

Figure 1 – Received Items List

## Other Acquisitions Enhancements

- Two fields were added to the invoice payment XSD file:
  - fund\_type – contains the fund type code selected for the fund
  - fund\_type\_desc - contains the description of the code table selected for the fund
- When scanning in items or returning items with the acquisition process type and no arrival date, a pop-up alert appears, containing the following text: Item has not been received by the Acquisitions Department.
- The **Expenditure** balance is now shown in the fund list, in addition to the Encumbrance and Available balances.
- For EOD imports, repeatable fund subfields are now supported by adding fund subfields in the same field tag. In addition, fund per location is supported by adding fund distribution, quantity, and library + location in the same field tag.

- As part of the shelf-ready process, Update Inventory profile, the conditions under which an item is updated have been modified in order to avoid duplication of barcodes in the repository.
  - Before this change, the **Basic** mapping profile updated only items that were not updated before, regardless of the barcode match. If all the items were already updated, the incoming item information was ignored.
  - Before this change, the **Advanced** mapping profile operated as follows:
    - If the barcode existed in the repository and the item had not been updated before, the item was updated.
    - If the barcode existed in the repository and the item had been updated before (or the barcode did not exist in the repository at all), Alma chose an item that did not have a barcode and updated it with the incoming barcode.
  - Following the modification with the December release, Alma attempts to match items based on the incoming barcode, for both the **Basic** and **Advanced** mapping profiles.
    - If the barcode exists in the repository and the item was updated before, the item will be skipped (for both the **Basic** and **Advanced** mapping profiles).
    - If the barcode exists in the repository and the item was not updated before, the item will be updated (for both the **Basic** and **Advanced** mapping profiles).
    - If the barcode does not exist in the repository and the **Basic** mapping profile is used, it will update an item that was not updated before, regardless of the barcode match. If all of the items were already updated, the incoming record will be ignored.
    - If the barcode does not exist in the repository and the **Advanced** mapping profile is used, the barcode will be set for items that do not have barcodes.
- The following new scheduling options were added:
  - Wednesday at 08:00 AM was added to the export invoice payment job.
  - 07:00 AM was added to the import invoice payment job.

# Resource Management

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

## Publishing Profile Enhancements

### Description

Alma publishing to external sources has been enhanced to include:

- Publishing on an item or portfolio level

Alma publishing to external sources has been enhanced to include publishing on an item or portfolio level. When this option is selected in the publishing profile, one bibliographic record will be published for each item/portfolio associated with the bibliographic record. If one bibliographic record is associated with multiple portfolio/items the bibliographic record will be published multiple times. This differs from current functionality where one bibliographic record is published containing ALL portfolio/item information. This functionality will be useful for integration with external sources such as the Hathi Trust and Aurora (State Library of Queensland).
- Capability to determinate how many records are included in each file (in order to align with external source requirements regarding file structure) using the following options:
  - **One File** with all records to be included in one file
  - Multiple files with a maximum size of 1,000, 5,000, or 10,000 records per file
- Expanded file naming options for the published files (in order to align with external source requirements regarding file naming) in the following manner:
  - Default file name composed of a prefix (that you define), the Alma process ID, and date/time processed
  - Single, unique file name that you define (that has no prefix or suffix assigned to it by Alma)

## Technical Instructions

The following roles can configure publishing profiles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

### To configure the new publishing profile options:

- 1 Access the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**).
- 2 Click **Add Profile** and select **General Profile**. The Publishing Profile Details page opens.
- 3 Locate the following new options in the **Content** and **Files Configuration** sections.
  - Publish on item/portfolio level
  - Number of records in the file
  - Use default file name

**Publishing Profile Details**

Profile Id -

Profile Name \*

Profile Description

Status  Active  Inactive

Scheduling  [Email](#)

**Content**

Set name \*

**Publish on item/portfolio level**

**Publishing Protocol**

FTP configuration \*

**Files Configuration**

Single File Configuration

MARC output format

**Number of records in file**

Compressed File Configuration

**Use default file name**  Yes  No

Compressed file name prefix \*

Compressed file extension

Figure 2 - Publishing Profile Details Page - New Options

4 Select the new configuration options (described below) to match your requirements.

- Select **Publish on item/portfolio level**

When you select this option, Alma publishes one file for each item/portfolio. If there are multiple items/portfolios linked to a bibliographic record, multiple records are published and each one contains a record with the bibliographic information and the unique item/portfolio information. Alma displays a message to alert you to this method of output processing.

**Content**

Set name \*

**Publish on**  **Please note that a bibliographic record will be published per item/portfolio level**

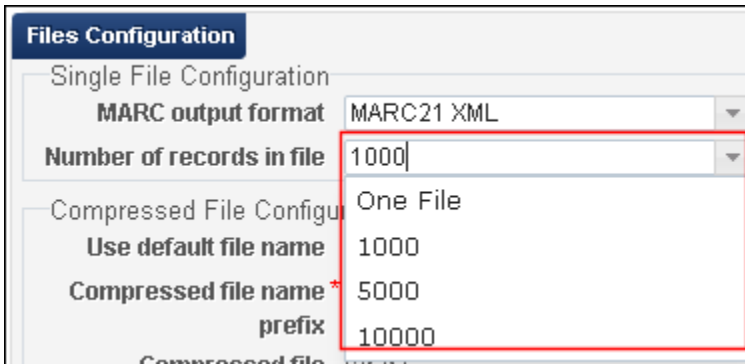
Figure 3 - Publish On Item/Portfolio Level Message

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**Note:** Once you have selected **Publish on item/portfolio level** and its profile is in active use, you should not clear/cancel this selected parameter.

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- Select the number of records (maximum) per file published from the drop-down list  
Your options are to choose a maximum of 1,000, 5,000, or 10,000 records per file or to select a single file option with no maximum records limitation. The default is 1,000 records per file.



The screenshot shows a 'Files Configuration' dialog box. Under 'Single File Configuration', the 'MARC output format' is set to 'MARC21 XML'. The 'Number of records in file' dropdown menu is open, showing options: 'One File', '1000', '5000', and '10000'. The '1000' option is currently selected. Under 'Compressed File Configuration', the 'Use default file name' is set to '1000', the 'Compressed file name \* prefix' is set to '5000', and the 'Compressed file extension' is set to '10000'.

Figure 4 - Number of Records in File Options

- Select **Yes** or **No** for the **Use default file name**  
When you select **No**, the display dynamically updates and prompts you to enter a single **File name** to be used for the publishing output that is generated.



The screenshot shows a 'Compressed File Configuration' dialog box. The 'Use default file name' section has two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. Below this, there is a text input field labeled 'File name \*' which is currently empty. At the bottom, the 'Compressed file extension' is set to 'tar.gz'.

Figure 5 - No Selected for Use Default File Name

When you select **Yes**, the system uses your entry as a prefix (**Compressed file name prefix**) and appends the process ID and date/time to the prefix for the file name(s) created.

- 5 Complete the remainder of the publishing profile as you normally would.

# Norwegian Authority System (BARE) Contribution and Integration

## Description

With the December release, Alma provides support for Norwegian Authority System (BARE) authorities in the Community Zone (CZ) and the ability for authorized contributing institutions to seamlessly submit approved authority records to the BARE database and the Alma CZ in an E2E workflow from directly within Alma.

In order to contribute BARE authority records, your institution needs to be configured in the CZ by Ex Libris. Submit a Salesforce case to request Ex Libris to configure your authorization in the CZ.

BARE data has been added to the CZ, and Ex Libris has added and will maintain the list of BARE contributing institutions with permission to update the BARE database.

With this new capability, you can create, update, or delete BARE authority records using the Alma MD Editor. When you save a new or updated record or delete a BARE record in the Alma MD Editor, a request is sent to BARE for approval (via SRU/U protocol). If an approved record response is returned, the record is saved in the Alma CZ and the master BARE database. Otherwise, an error message is displayed to the user in the MD Editor, and whatever issue BARE has with the record will need to be resolved.

Changes accepted by BARE are incorporated into the master BARE database and become available to all Alma users through the CZ. Ex Libris will regularly update the CZ with BARE changes to include those changes made outside the Alma environment.

Similar to the existing method (using F3), MARC 21 bibliographic records can be created or edited in the Alma MD Editor using BARE authorities. Refer to the **Creating Bibliographic Records** section in the *Alma Resource Management Guide* or the Online Help for more information.

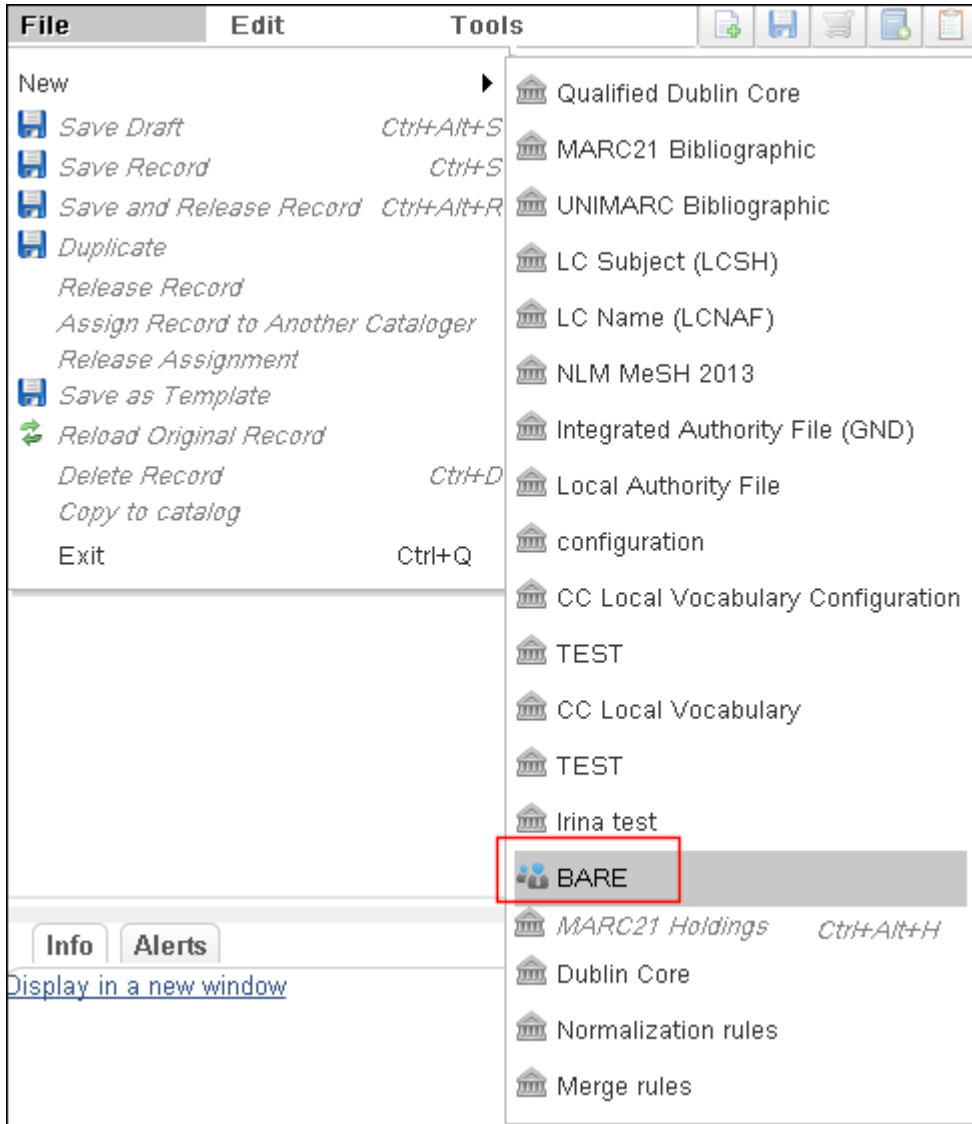
## Technical Instructions

The following roles can use the MD Editor to submit records from a contributing BARE institution:

- Catalog Administrator
- Repository Administrator
- General System Administrator

**To contribute/submit a BARE record for approval:**

- 1 Open the MD Editor (**Resource Management > Cataloging**).
- 2 Click **File > New > BARE** to create a new record.



**Figure 6 - BARE Contribution Option**

- 3 Enter the authority record details.
- 4 Click the **Save** icon.

Alma submits the record to BARE for approval. If there is an error, BARE responds through the Alma MD Editor with an error message. If the contributed record is approved, it is stored in the CZ and the master BARE database.

# Overlap Analysis

## Description

With the December release, Alma provides the capability to perform overlap analysis for electronic resources. When making acquisitions decisions, this facility enables you to compare content of electronic collections in order to determine where there may be a subscription overlap.

## Technical Instructions

The following roles can process overlap analysis:

- Purchasing Operator
- Purchasing Manager
- Repository Manager
- Electronic Inventory Operator

### To perform overlap analysis:

- 1 Open the Overlap Analysis page (**Resource Management > Advanced Tools > Overlap Analysis**).
- 2 Click **Submit New Report**. The system defaults to the Set Comparison type of report.
- 3 Click **Next**. The Compare Electronic Collections page opens.
- 4 Click **Definition of Source Set** and complete the usual repository steps to identify your source set of records.
- 5 Select the **Select All** option or select individual records from the repository search results to identify the records in your source set and click **Add Selected**.
- 6 Click **Done** when you have completed identifying the records for your source set. The system displays your source set on the Compare Electronic Collections page.

Figure 7 - Source Set Defined

- 7 Click **Definition of Target Set** and complete the usual repository steps to identify your target set of records
- 8 Select the **Select All** option or select individual records from the repository search results to identify the records in your target set and click **Add Selected**.
- 9 Click **Done** when you have completed identifying the records for your target set. The system displays your target set on the Compare Electronic Collections page.  
You may repeat the **Definition of Target Set** steps again to define an additional target set for comparison.
- 10 When you have completed defining your source and target sets, click **Next**. The Compare Electronic Collections page refreshes to display the following:

Figure 8 - Compare Electronic Collections Parameters

- 11 Enter the following to match your requirements:
  - Report name
  - Report description

- Match method (ISSN, ISBN, Title, LCCN, or 035)
- Use date coverage information in the comparison (select the check box if you want to use this information)

When you select this option, the following parameter becomes an active option.

- Reference year for calculating the embargo (make a selection from the drop-down list: Current Year, Current +1, Current +2, and so forth)

12 When you are finished setting the parameters, click **Submit**. The system displays a message confirming that your Overlap Analysis job has been successfully submitted.

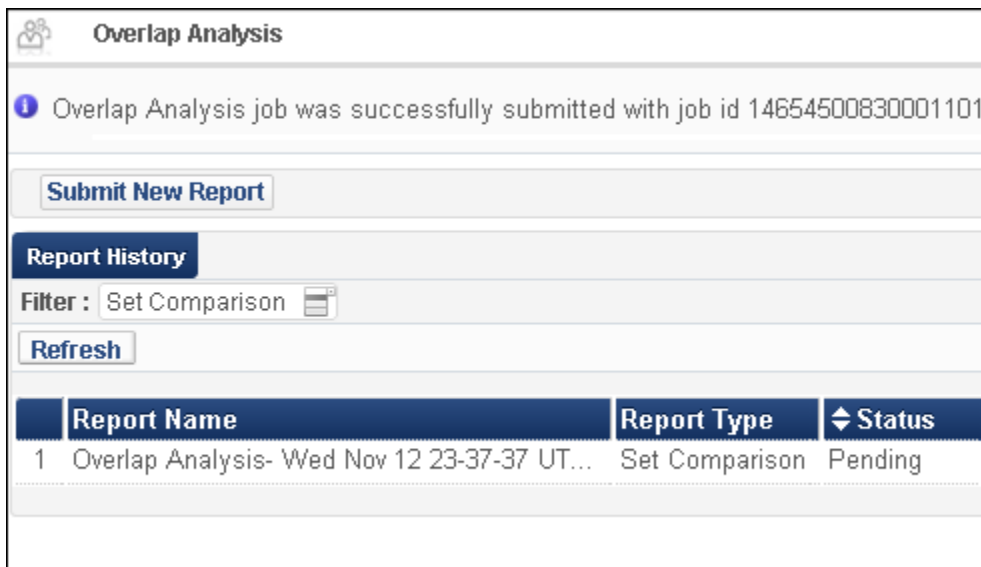


Figure 9 - Successfully Submitted Overlap Analysis Job

13 Use **Monitor Jobs (Administration > Manage Jobs)** to track the progress of your Overlap Analysis report.

14 When your job has completed processing, select the **History** tab on the Monitor Jobs page and select **Actions > Report** to view your results. Use the **Repository** filter to more quickly locate your report. The report provides the following information:

- Process ID
- Name (of the job)
- Started on/Finished on dates and time
- Total run time
- Created by (user ID)
- Status
- Status date

- Records processed (total number)
- Records with exceptions (number)
- Links to the reports created

The screenshot shows a 'Job Report' window. At the top left, there is a green checkmark icon and the text 'Completed Successfully'. To the right, the 'Process ID' is 14388335780001021. Below this, the 'Started on' time is 20/11/2014 01:28:20 AM IST, and the 'Total run time' is 4 Minutes 45 Seconds. The 'Status' is 'Completed Successfully'. The 'Records processed' count is 9339. On the right side, there are labels for 'Name', 'Finished on', 'Created by', 'Status date', and 'Records with exceptions'. Below the main report details is a section titled 'Counters' with a red background. It contains four links: 'Link to report: Set Comparison - Complete Overlap report (864)', 'Link to report: Set Comparison - Partial Overlap report (1595)', 'Link to report: Set Comparison - Title Overlap report (3)', and 'Link to report: Set Comparison - Unique Titles report (2907)'.

Figure 10 - Overlap Comparison Report Links

15 Click the links in the results provided to view the following types of comparisons/reports (in Excel format):

- Complete Overlap Report – This report contains matching titles with identical coverage dates.
- Partial Overlap Report – This report contains matching titles with partially overlapping coverage dates.
- Title Overlap Report – This report contains matching titles with mutually exclusive coverage dates.
- Unique Titles Report – This report contains titles that are unique to the source set you created for the comparison.

Each report link has a number in parentheses indicating the number of titles in the report. For example, **Set Comparison - Title Overlap report (3)** indicates that there are three titles in the Title Overlap Report as a result of the comparison that was done.

The Complete Overlap Report, the Partial Overlap Report, and the Title Overlap Report contain the following columns:

- Title
- Identifier

- MMS ID
- Collection – Source Set
- Portfolio ID – Source Set
- Coverage – Source Set
- Collection – Target Set
- Portfolio ID – Target Set
- Coverage – Target Set

The Unique Titles Report contains the following columns:

- Title
- Identifier
- MMS ID
- Collection – Source Set
- Portfolio ID – Source Set
- Coverage – Source Set

In the Unique Titles Report, these titles are the ones that are unique to the source set that you created for the comparison.

Below is an example of a Partial Overlap Report that contains matching titles with partially overlapping coverage dates. This illustration is displayed in three sections showing rows 1 through 9 for columns A-C, D-G, and H-K of the report spreadsheet. Specifically, columns G and K show the source and target coverage overlap information. In row 2, for example, coverage years 2000 – 2011 overlap between the source and the target sets for "The South African archaeological bulletin" title.

	A	B	C
1	TITLE	Identifier	MMS ID
2	"The South African archaeological bulletin"	00381969	99127128380001021
3	"Near Eastern archaeology"	10942076 23255404	99127486770001021
4	"Proceedings of the American Philological Association"	0003049X	99127248850001021
5	"The Athenian Agora"	23268662 15588610	99126833970001021
6	"Record of the Art Museum, Princeton University"	0032843X 23257644	99128780900001021
7	"The classical journal"	00098353 23275812	99128998090001021
8	"African arts Arts d'Afrique."	00019933 19372108	99127762900001021
9	"Bulletin of the American Schools of Oriental Research"	21618062 0003097X	99126971680001021

Figure 11 - Partial Overlap Report Rows 1-9, Columns A-C

	D	E	F	G
1	Collection - Source Set	Interface - Source Set	Portfolio ID - Source Set	Coverage - Source Set
2	"JSTOR Arts & Scienc	"JSTOR"	53389654440001021	1945-2011
3	"JSTOR Arts & Scienc	"JSTOR"	53390424960001021	1998-2010
4	"JSTOR Arts & Scienc	"JSTOR"	53389917710001021	1838-2010
5	"JSTOR Arts & Scienc	"JSTOR"	53389001460001021	1953-2009
6	"JSTOR Arts & Scienc	"JSTOR"	53393103130001021	1948-2010
7	"JSTOR Arts & Scienc	"JSTOR"	53393576010001021	1905-2010
8	"JSTOR Arts & Scienc	"JSTOR"	53390973640001021	1967-
9	"JSTOR Arts & Scienc	"JSTOR"	53389313680001021	1921-2010

Figure 12 - Partial Overlap Report Rows 1-9, Columns D-G with Source Coverage


	H	I	J	K
1	Collection - Target Set	Interface - Target Set	Portfolio ID - Target Set	Coverage - Target Set
2	"EBSCOhost Art Full Text "		53389654430001021	2000-
3	"EBSCOhost Art Full Text "		53390424950001021	1999-
4	"EBSCOhost Art Full Text "		53389917700001021	2004-
5	"EBSCOhost Art Full Text "		53423005970001021	2009-
6	"EBSCOhost Art Full Text "		53393103120001021	1996-
7	"EBSCOhost Art Full Text "		53393575990001021	1995-
8	"EBSCOhost Art Full Text "		53390973620001021	1997-2011
9	"EBSCOhost Art Full Text "		53389313670001021	1999-

Figure 13 - Partial Overlap Report Rows 1-9, Columns H-K with Target Coverage

## Inventory/PDA ID Relationship Management Enhancements

### Description

With the December release, the Electronic Portfolio Editor provides an additional parameter that enables you to assign a PDA (Patron-Driven Acquisition) to an electronic portfolio. This provides a library with the ability to associate migrated electronic books to a PDA program without the extra steps of recreating the PDA program from the beginning for those resources.

 **Electronic Portfolio Editor**


**Resource description** [Medical & healthcare marketplace guide. IDD Enterprises | Philadelphia, PA \[etc.\] 1975- \[0146-8022\]](#)  
[Relink to another bibliographic record](#)


**Electronic Collection name** [LexisNexis Academic](#)

**Service Type** Full Text

**Portfolio Information** | **Linking Information** | **Coverage Information**

**Portfolio availability**  Not Available  Available


**Activation date**  

**Library**  


**Electronic Newspaper material type**

**Expected activation date**

**Electronic - Collection PO Line**

**PO Line**   **PO line details -**

**Electronic - collection license**

**License**   **View license - details**



**PDA**    **View PDA details** [PDA12](#)

Figure 14 - PDA Parameter

Previously, you were only able to view the PDA details page via the link provided.

The screenshot shows the 'Electronic Portfolio Editor' interface. At the top, there is a 'Resource description' field with the text 'Medical & healthcare marketplace guide. IDD Enterprises Philadelphia, PA [etc.] 1975- [0146-8022]' and a button labeled 'Relink to another bibliographic record'. Below this, the 'Electronic Collection name' is 'LexisNexis Academic' and the 'Service Type' is 'Full Text'. There are three tabs: 'Portfolio Information', 'Linking Information', and 'Coverage Information'. The 'Portfolio Information' tab is active. It contains fields for 'Portfolio availability' (radio buttons for 'Not Available' and 'Available', with 'Available' selected), 'Activation date' (09/28/2014), and 'Library'. To the right, 'Electronic material type' is 'Newspaper' and 'Expected activation date' is empty. Below these are fields for 'Collection PO Line', 'PO Line', 'Electronic collection license', and 'License'. At the bottom, there is a 'PDA' field with 'PDA12' and a 'View PDA details' button with a link 'PDA12'. A red box highlights the 'PDA' field and the 'View PDA details' button, and a red oval highlights the 'View PDA details' button and the 'PDA12' link.

Figure 15 - PDA Details Page Link

You can also run the **Change electronic portfolio information** job to change the PDA assignment for a set of electronic portfolios.

## Technical Instructions

The following role can utilize the new inventory/PDA feature for electronic portfolios:

- Electronic Inventory Operator

### To assign a PDA to an electronic portfolio:

- 1 Locate the electronic portfolio to which you want to assign a PDA (using repository search) and open it in the Electronic Portfolio Editor.
- 2 Select the **Portfolio Information** tab.

- Click the browse icon for the PDA parameter. The Patron Driven Acquisition (PDA) List page opens.

	Name	Code	Status	Vendor	Start Date	End Date
1	PDA12	PDA12	Active	Blackwell	01/08/2012	08/07/2012
2	PDA4	PDA4	Draft	Blackwell	01/09/2012	-

Figure 16 - Patron Driven Acquisition (PDA) List Page

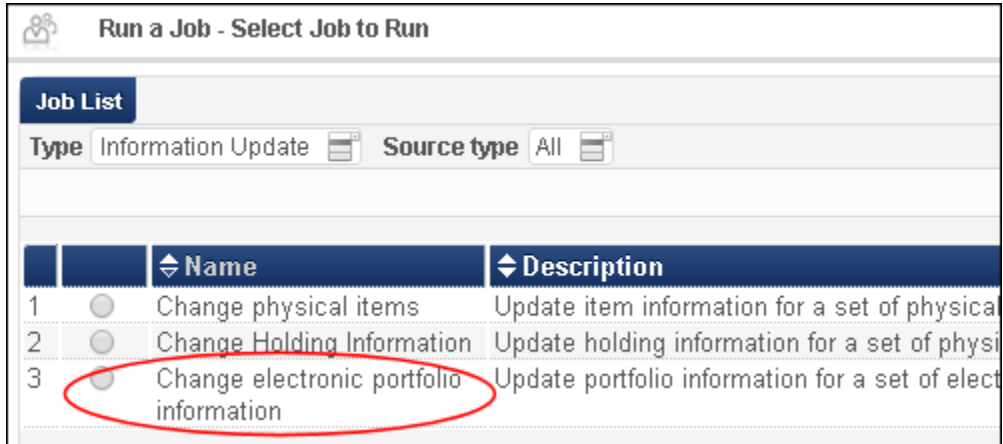
Select a PDA from the list to assign to the electronic portfolio and click the **Select** button. Your selection displays in the PDA parameter on the Portfolio Information tab of the Electronic Portfolio Editor page.

Figure 17 - PDA Parameter

- Click **Save**.

**To assign a PDA to a set of electronic portfolios:**

- 1 Access the **Change electronic portfolio information** job (**Administration > Manage Jobs > Run a Job** and filter on **Type=Information Update**).
- 2 Select the **Change electronic portfolio information** job and click **Next**.



**Figure 18 - Change Electronic Portfolio Information Job**

- 3 Select the set of electronic portfolios to which you want to assign PDA information and click **Next**.
- 4 Select the **Set PDA** parameter and click the browse icon to open the Patron Driven Acquisition (PDA) List page.

Run a Job - Enter Task Parameters

— Task Parameters: Change Electronic Portfolio Information

Set interface name (for standalone portfolios)

Set owner

Remove 'Available For' groups

Add 'Available For' groups

Electronic Material Type

Remove local coverage

Set license

Set PDA

Delete or replace url's prefix

Enable proxy  No  Yes

Figure 19 - Set PDA Parameter

- 5 Select the PDA to assign to the set and click the **Select** button.
- 6 Click **Next**.
- 7 Complete the remainder of the job parameters as you normally would.

## Import Profile – Override Merge Restrictions

### Description

In order to prevent a situation in which a good quality record is overlaid with a lower quality imported record, this functionality provides additional control on when an imported record will be overlaid or merged. The **Do not override/merge a non-brief record with a brief record** merge/overlay parameter has been added to the Match Profile tab of the Import Profile Details page.

When you select the **Do not override/merge a non-brief record with a brief record** parameter, Alma uses the brief record algorithm configured by Ex Libris at installation to determine what constitutes a brief record. When this option is selected and the matched record is identified as brief, the imported record will not overlay/merge the matched record. Refer to the **Identifying brief records** description in the **System-Defined Jobs per Content Type** table (updated in the December *Alma Administration Guide* or the Online Help) for more information.

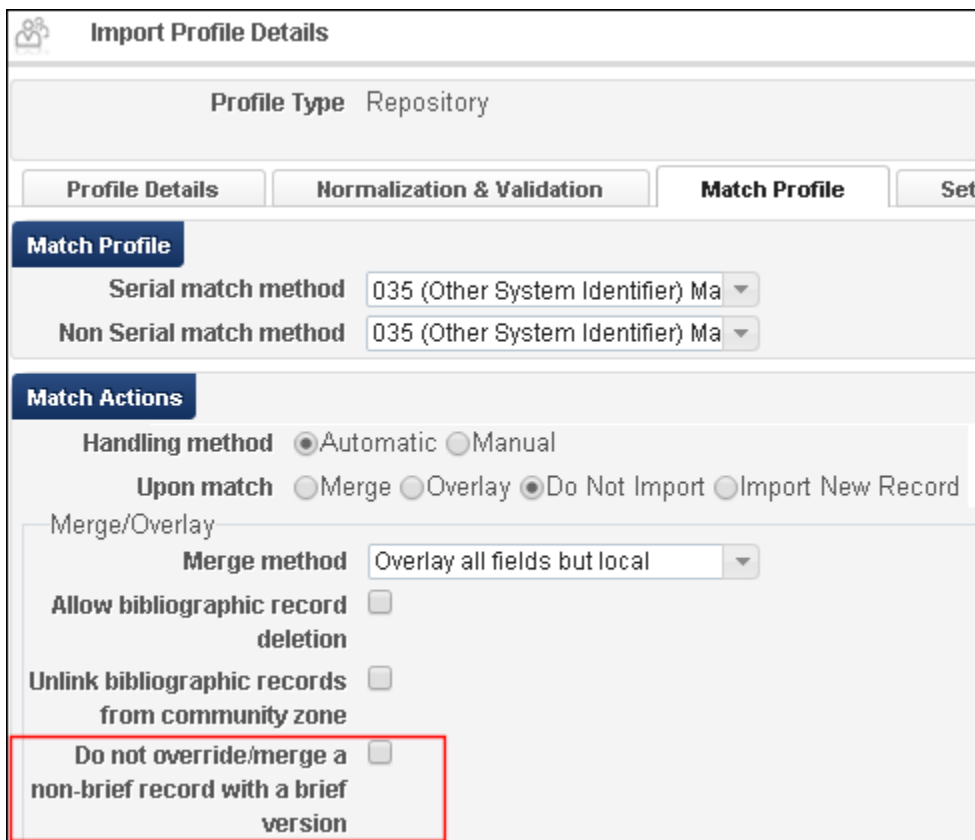
## Technical Instructions

The following role can utilize the new import profile parameter:

- Catalog Administrator

### To configure the new import profile override parameter:

- 1 Open the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**) and select **Actions > Edit** for the import profile to which you want to add this new parameter.
- 2 Select the **Match Profile** tab on the Import Profile Details page.
- 3 Select the **Do not override/merge a non-brief record with a brief record** parameter.



The screenshot shows the 'Import Profile Details' page for a 'Repository' profile. The 'Match Profile' tab is active. Under 'Match Profile', both 'Serial match method' and 'Non Serial match method' are set to '035 (Other System Identifier) Ma'. Under 'Match Actions', 'Handling method' is 'Automatic', 'Upon match' is 'Do Not Import', and 'Merge method' is 'Overlay all fields but local'. The checkbox for 'Do not override/merge a non-brief record with a brief version' is checked and highlighted with a red box.

Figure 20 - Import Profile Override Parameter

- 4 Click **Save**.

# Deleting Local Digital Representations

## Description

The name of the **Withdraw digital remote representations** job has been changed to **Withdraw digital representations**, and the job has been enhanced to allow the deletion of digital representations in your local Alma repository.

## Technical Instructions

The following roles are required to delete digital representations using this process:

- Digital Inventory Operator
- Digital Inventory Operator Extended

### To delete remote and local digital representations:

- 1 On the Create Job – Select Job to Run page (**Administration > Manage Jobs > Run a Job**), select **Withdraw** from the **Filter** drop-down list.

The withdraw jobs display in the list.

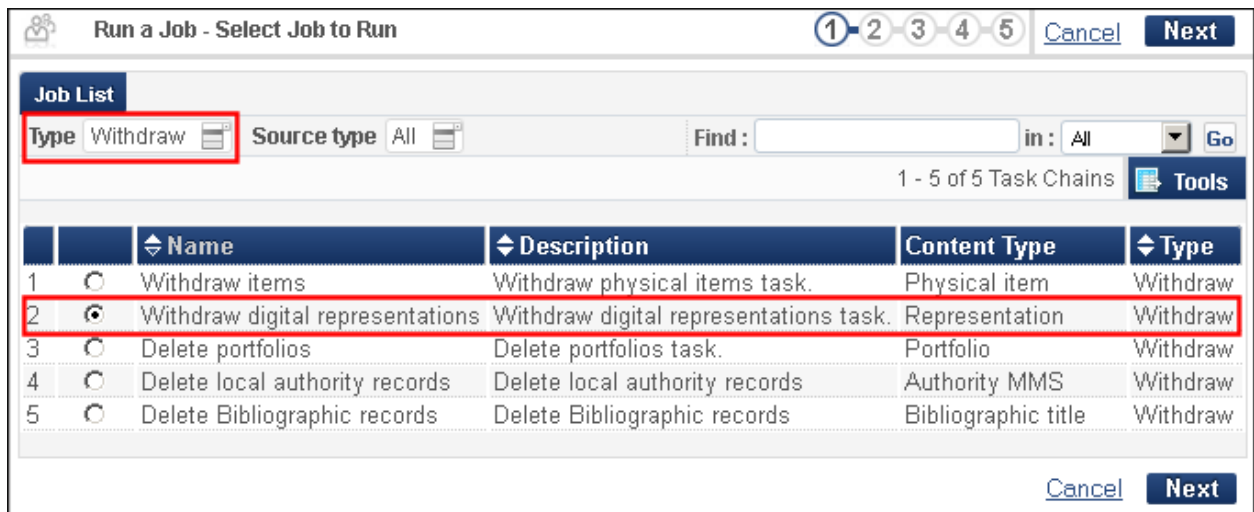


Figure 21 – Select Job from Withdraw Type

- 2 Select **Withdraw digital representations** and click **Next**.
- 3 On the Create Job – Select Set page, select the set on which you want to run the job and click **Next**.
- 4 On the Create Job – Enter Task Parameters page, choose how you want the system to handle the bibliographic records and click **Next**.

- 5 On the Create Job – Job Details and Schedule page, enter a name for the job and a schedule on which you want the job to run and click **Next**.
- 6 On the Create Job – Review and Confirm page, review the information. If everything is correct, click **Save**. To go back and change something, use the **Back** button.

## Due Date Added to Activation Task List

### Description

In order to provide better management control of the electronic activation task list, you can now add a due date to an electronic resource activation task (similar to work orders). When the due date passes, a notification is sent to the user that is assigned the e-resource activation task. A due date can be added to an activation task from three locations:

- As a default from Resource Management Configuration
- From the PO Line Summary page when creating or editing a PO line
- From the Electronic Resource Activation Task List

### Technical Instructions

The following roles can access this enhancement:

- Electronic Inventory Operator
- Repository Manager

#### To create a default due date for all electronic resource activation tasks:

A default due date can be configured from **Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**.

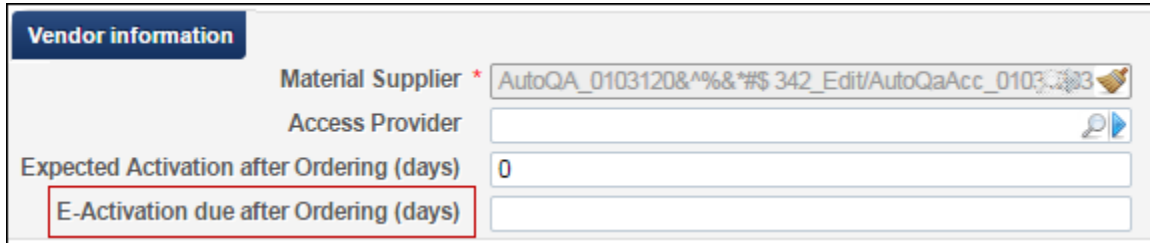
Mapping Table Rows							Tools
	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
1	access_right_default_policy	repository	Allow		exl_impl	09/15/2014	Restore
2	activation_due	repository	30		-		Customize

Figure 22 – Activation Due Parameter

The default value configured here appears in the PO Line Summary page when creating electronic orders.

## To add a due date to an electronic resource activation task from the PO line summary page:

- 1 Display the PO Line Summary page as part of the Purchasing workflow or edit an existing PO line by searching for a non-active PO line in the persistent search box and clicking **Edit** for an electronic order. The PO Line Summary page displays the new **E-Activation due after ordering (days)** field.



The screenshot shows a form titled "Vendor information" with the following fields:

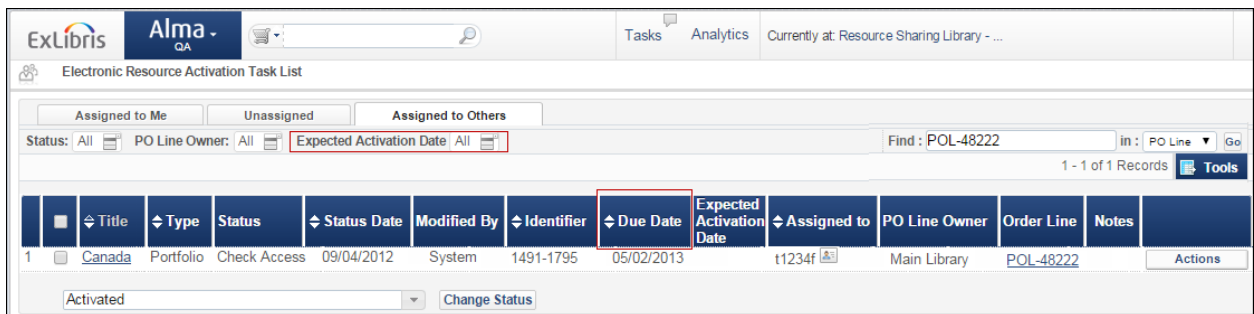
- Material Supplier \* (text input with a dropdown arrow)
- Access Provider (text input with a search icon)
- Expected Activation after Ordering (days) (text input with value "0")
- E-Activation due after Ordering (days)** (text input, highlighted with a red box)

Figure 23 – E-Activation Due After Ordering (days)

- 2 Enter the number of days after ordering that the task is due.

## To add a due date to an electronic resource activation task from the Electronic Resource Activation Task List:

- 1 Open the Electronic Resource Activation Task List from the Alma main menu by selecting **Resource Management > Manage Inventory > Manage Electronic Resource Activation**. (Alternatively, you can click **Go to task list** for from the PO Line Summary page for a non-active PO line.)



The screenshot shows the "Electronic Resource Activation Task List" interface. The table below is a representation of the data shown in the screenshot:

	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expected Activation Date	Assigned to	PO Line Owner	Order Line	Notes	
1	Canada	Portfolio	Check Access	09/04/2012	System	1491-1795	05/02/2013		t1234f	Main Library	POL-48222		Actions

Additional details from the screenshot: The "Expected Activation Date" filter is set to "All". The search criteria is "POL-48222". The status is "Activated".

Figure 24 – Electronic Resource Activation Task List

The task list now displays the Due Date column, which lists the due date of each task as entered in the **E-Activation due after ordering (days)** field.

- 2 Select **Actions > Edit** and click the calendar icon in the **Due date** field to select an alternative due date.

The **Notify e-activation due task** job sends a notification to users that are assigned a task whose due date has passed. The notification is sent only once, unless the due date is changed.

The following is an example of the notification:

**Notify E-Activation due** 11/11/2014

You have been assigned to the following Electronic resource activation tasks that their Due date has passed :

E-Tasks List :

Title	Identifier	Due Date
Abbreviations		04/11/2014
AMERICAN SCHOOL BOARD JOURNAL.		01/01/1970

Sincerely  
Your Department

Figure 25 – E-Activation Task Notification

After the task is due, an alert is displayed in your list of tasks indicating how many passed due e-activation tasks are assigned to you.

Tasks Currently at: Main Library

- Electronic resources - activation - assigned to you (3)
- Electronic resources - activation - unassigned (1)
- Electronic resources - activation - passed due date - assigned to you (1)
- Invoices - approval - assigned to you (1)
- Invoices - review - assigned to you (7)
- Invoices - review - without assignment (2)

Figure 26 – E-Activation Task – Passed Due – Assigned to You

Click the link to display your passed due e-activation tasks.

## New Call Number Parsing Routine

A new call number parsing routine (#11) has been added to the list of call number parsing routines available from **Resource Management > Resource Configuration > Configuration > General > Call Number Parsing**. It parses the call number by space, comma, semicolon, and plus sign.

For example:

M780.92, P175 1;F

is parsed as:

M780 . 92  
P175  
1  
F

For more information concerning call number parsing, see the **Configuring Call Number Parsing** section in the *Alma Resource Management Guide* or the Online Help.

## Other Resource Management Enhancements

- 700 \$e has been added to the Name index.
- Previously announced local holdings support for 9XX, X9X, XX9, and 883 is available as a result of the latest re-indexing. Refer to the *Holdings Local Field Support* section in the September 2014 release notes for more information.
- The Task Parameter labels (see below) have been enhanced for the **Withdraw items** job (**Administration > Manage Jobs > Run a Job**).

The screenshot shows a dialog box titled "Task Parameters: Withdraw items". It contains several sections with radio buttons and checkboxes:

- How to handle holdings without items and bibliographic records?** (radio button selected)
  - Keep holdings and bibliographic records
  - Delete holdings; delete bibliographic records that have no other holdings
  - Suppress holdings from publishing; suppress bibliographic records that have no other holdings from publishing
  - Delete holdings; suppress bibliographic records that have no other holdings from publishing
- Do not withdraw items with active requests**
- Do not withdraw items with non-active requests in the queue**
- Do not withdraw items with work orders**

Figure 27 - Withdraw Items Task Parameter Label Changes

See the table below for the changes that have been made.

Previous Label	New Label
<p>How to handle holdings without items and bibliographic records:</p> <ul style="list-style-type: none"> <li>• Do nothing</li> <li>• Delete holdings without items and bibliographic records</li> <li>• Suppress holdings without items and bibliographic records</li> <li>• Delete holdings without items and suppress bibliographic records</li> </ul>	<p>How to handle holdings without items and bibliographic records:</p> <ul style="list-style-type: none"> <li>• Keep holdings and bibliographic records</li> <li>• Delete holdings; delete bibliographic records that have no other holdings</li> <li>• Suppress holdings from publishing; suppress bibliographic records that have no other holdings from publishing</li> <li>• Delete holdings; suppress bibliographic records that have no other holdings from publishing</li> </ul>
Do not withdraw items with active requests	No change
Do not withdraw items with requests that have not begun yet	Do not withdraw items with non-active requests in the queue
Do not withdraw items with work orders	No change

Refer to the **Withdrawing Sets of Items** section in the *Alma Resource Management Guide* or the Online Help for more information regarding the **Withdraw items** job.

- The following physical and electronic material types have been added to the relevant drop-down lists:
  - Physical material types: Microform, Videorecording, Playaway
  - Electronic material types: Data set, Website, Video
- The **License Name** column was added to the portfolio export file for informative purposes. It is not used during an import.
- It is now possible to edit the name of a local electronic collection in the Electronic Collection Editor.

- In the Portfolio Editor, the Portfolio Information tab listed **Activation date**, whereas the History tab listed **Arrival date**. This has now been standardized as **Activation date** in both places. Similarly, in the Electronic Collection Editor, the General Information tab listed **Activation date**, whereas the History tab listed **Arrival date**. This has now been standardized as **Activation date** in both places. In the Physical Item Editor, the General Information tab listed **Receiving date**, whereas the History tab listed **Arrival date**. This has now been standardized as **Receiving date** in both places.
- The **Run full publishing** option was added to the OCLC publishing profiles.
- A general keyword search has been added to Advanced Search list of conditions.
- In the MD Editor, when the F3 (headings suggestion) provides no results, a **No matching headings found** label now appears.

# Fulfillment

The following section describes the new functionality provided for the Fulfillment functional area in the December 2014 release of Alma.

## Hiding General Hold Requests for Physical Journals

### Description

The General Hold Request option enables users to place a request for a journal's issue even if a physical item has not been cataloged for that issue. It is now possible to use Alma's Display Logic Rules functionality to hide this service in Primo regardless of whether any of a journal's issues have been cataloged. Previously, the service could be hidden in Primo only if there were no items cataloged for the holdings record.

The following figure shows the general holds request options displayed in Primo:

The screenshot shows a Primo record for "The Japan Christian year book." The record includes the title, author information, and a note that it is available at O'Neill Library Offsite Collection (BV3440 .J27) and other locations. Below the title, there are tabs for "Get It", "Locations", "Details", "Reviews & Tags", and "Virtual Browse". Under the "Get It" tab, there are several request options: "Request a different issue", "Digitize a different issue", "Interlibrary Loan", "Scanned Journal Article", and "Back". The "Request a different issue" and "Digitize a different issue" options are highlighted with red boxes. Below the request options, there is a section for "Boston College Libraries" with a "Show Details" link. The record also shows the location "O'Neill Offsite Collection BV3440 .J27" and filters for "Year", "Volume", and "Description". A table displays 3 records with columns for Barcode, Type, Policy, Description, Status, and Options. The table shows three issues from 1962, 1932, and 1958, all with a status of "Item in place" and options for "Request" and "Digitization".

Barcode	Type	Policy	Description	Status	Options
39031022927974	Issue	12 Month	1962	Item in place	Request   Digitization
39031022927958	Issue	12 Month	1932	Item in place	Request   Digitization
39031022927966	Issue	12 Month	1958	Item in place	Request   Digitization

### Technical Instructions

The following roles are required to update display logic rules:

- General System Administrator
- Fulfillment Administrator

**To hide general hold request options for physical journals:**

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Display Logic Rules** under **Discovery Interface Display Logic**.



Figure 28 – Discovery Interface Display Logic Page

- 2 Click Add Rule.

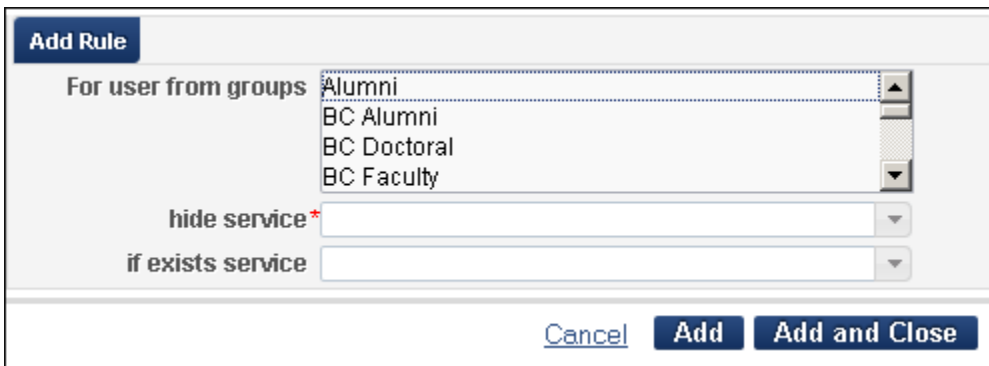


Figure 29 – Add Rule Dialog Box

- 3 Select **General Hold Request** from the **hide service** drop-down list.

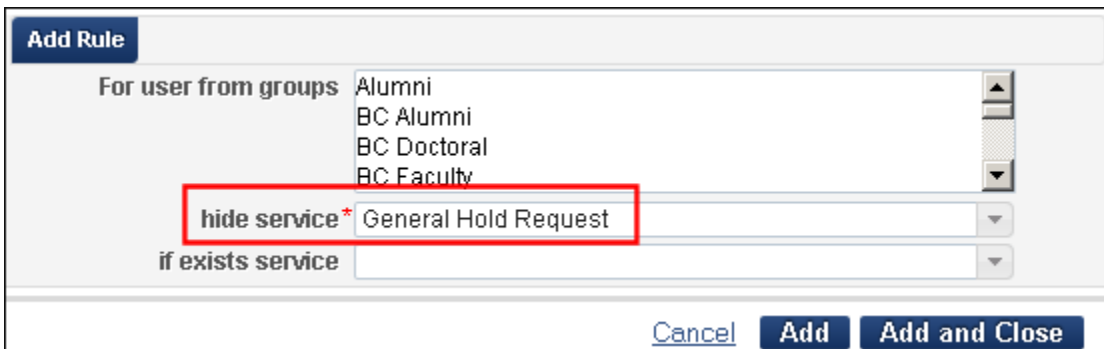


Figure 30 – General Hold Requests Selected

- 4 Enter values for the remaining fields and click **Add and Close**.

The Add Rule dialog box closes, and the new rule is added under the Institution Rules section on the Discovery Interface Display Logic page.

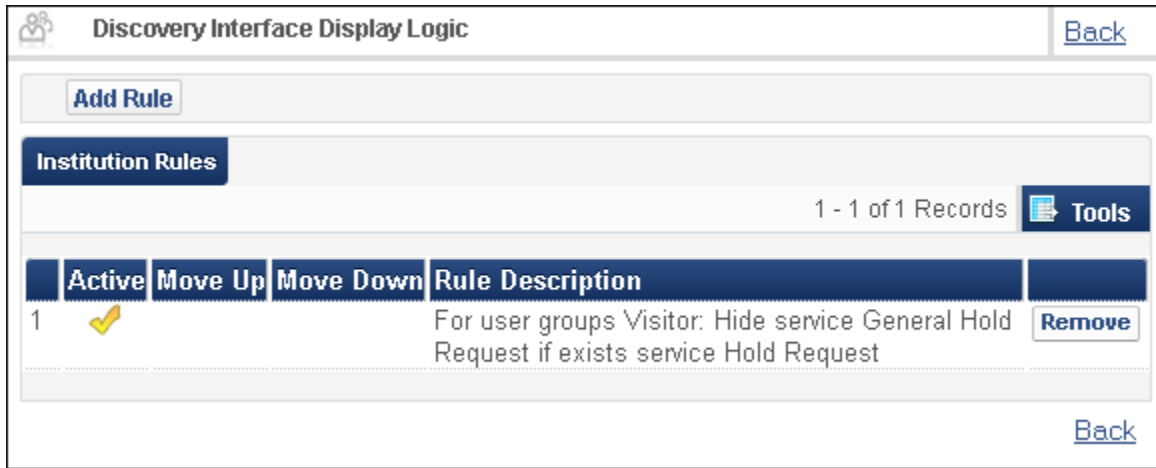


Figure 31 – Rule Added to Institution Rules Section

The following figure shows the general hold request options hidden in Primo:

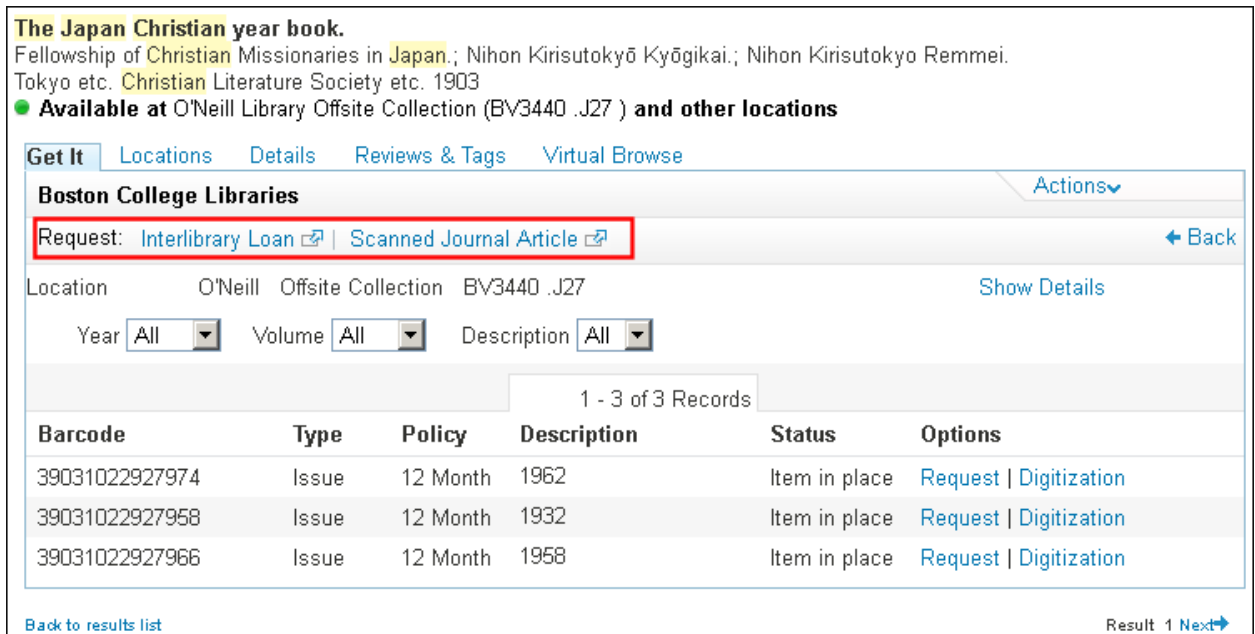


Figure 32 – Request Options Hidden in Primo

## Other Fulfillment Enhancements

- When creating in-house loans, the following fields have been added for creating future in-house loans:
  - Author
  - MMS ID
  - Holding ID
  - Description
  - Location code
  - Library ID
  - Material type
  - Call number
  - Title
- When deleting a loan, the status of the item changes to **Missing** (for lost loans) or **In Place** (for other loans).
- You can set the **exclude\_lost\_and\_claimed\_returned\_loans\_from\_overdue** parameter in the CustomerParameters Mapping Table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) to exclude lost and claimed returned loans from the number of loans that are allowed to be overdue (overdue limit).
- You can set the **patron\_services\_timeout\_minutes** parameter in the CustomerParameters Mapping Table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) to set the number of minutes after which the Patron Services page closes. You can configure a value between 1-30 minutes. The default value is 2 minutes.
- When an item policy, material type, or location is changed, a confirmation message displays in both the Item Editor and the Scan In Items page (whichever is relevant).
- The **Debit Card** option has been added as a payment option for Fines and Fees.
- If the **Lost item replacement fee** policy for a terms of use is set to **Other** with the value **0**, then no fine is added to the user, even if the item has a replacement cost.  
  
If the **Lost item replacement fee** policy is set to **None**, the fee is generated according to the item's replacement cost.

- When registering a linked user fails due to the user not being found, the **User not found** error message is generated.

When registering a linked user fails due to the user belonging to an unexposed group, the **User is not granted the service** error message is generated.

The link to configure an unexposed group is titled **Restricted Users**.

# Resource Sharing

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

## Creating a Borrowing Request Using External Resources

### Description

This feature enables you to create a borrowing request for a resource that is cataloged in an external system (that is, outside of Alma and the current institution). Using this tool, operators can use existing records to describe the required resource by using a catalog record or another institution, instead of having to manually type in the request's description. You can search for resources using an external search profile.

### Technical Instructions

The following roles can create a borrowing request from an external search:

- Fulfillment Services Operator
- Fulfillment Services Manager

#### To create a resource sharing borrowing request from an external search:

- 1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), select **Add > From External Resource**. The External Resource Search page opens.

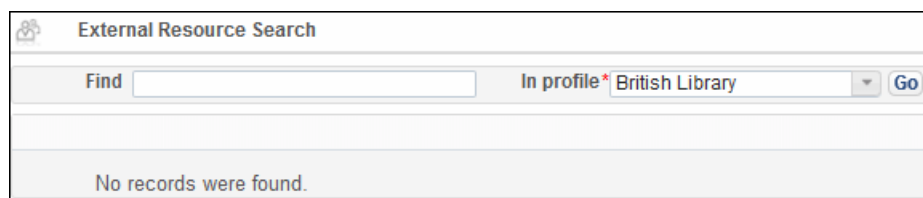


Figure 33 – External Resource Search Page

- 2 In the **Find** field, enter search criteria.
- 3 In the **In profile** field, select the external profile by which the criteria is to be searched.

---

**Note:** The displayed list of profiles includes the external search profiles configured on the External Search Profile List page (**Resource Management > Resource Configuration > Configuration Menu > Search Configuration > External Search Profile**).

---

4 Click **Go**. The search results display on the page.

The screenshot shows the 'External Resource Search' interface. At the top, there is a search bar with the text 'history' and a dropdown menu set to 'In profile\* British Library'. A 'Go' button is to the right. Below the search bar, there is a dropdown for 'View results of targets' set to 'British Library Public Cat'. The main area displays a list of 10 search results, each with a radio button, a title, author information, and an ISBN. The results are as follows:

Item	Title	Author	ISBN
1	Call of the Heather / Gwen Kirkwood.	By Kirkwood, Gwen author	ISBN: 1783754729 EPUB
2	A Brief History of the House of Windsor : The Making of a Modern Monarchy / Michael Paterson.	By Paterson, Michael author	ISBN: 178033804X EPUB
3	Slap and Tickle : The Unusual History of Sex and the People Who Have it / Tom Cutler.	By Cutler, Tom author	ISBN: 1780338368 EPUB
4	A Brief History of the Spy : Modern Spying from the Cold War to the War on Terror / Paul Simpson.	By Simpson, Paul author	ISBN: 1780338910 EPUB
5	A Brief History of the First World War : Eyewitness Accounts of the War to End All Wars, 1914 201318 / Jon E. Lewis.	By Lewis, Jon E. author	ISBN: 1472111745 EPUB
6	A Brief History of Superheroes / Brian J. Robb.	By Robb, Brian J., author.	ISBN: 1472110706 EPUB
7	My Revision Notes OCR (A) GCSE Schools History Project 2nd Edition / Louise O'Gorman.	By O'Gorman, Louise author	ISBN: 1471829715 EPUB
8	AQA GCSE Modern World History Revision Guide 2nd Edition / Ben Walsh, Steve Waugh.	By Walsh, Ben author	ISBN: 1471831779 EPUB
9	Edexcel GCSE Modern World History Revision Guide 2nd edition / Ben Walsh, Steve Waugh.	By Walsh, Ben author	ISBN: 1471831744 EPUB
10	Complete Greek: Teach Yourself / Aristarhos Matsukas.	By Matsukas, Aristarhos author	ISBN: 1444131702 EPUB

Figure 34 – External Resource Search Page — Search Results

5 Select the resource from which you want to create a borrowing request and click the **Select** button. The Resource Sharing Borrowing Request page opens.

**Resource Sharing Borrowing Request**

General Information Parameters

**Request Attribute**

Title A Brief History of the House of Windsor : The Making of a Modern Monarchy / Michael Paterson.

Requester\*

Request Status Created borrowing request

Requested Format Physical

Allow Other Format

Preferred Send Method

Needed By

Delivery Location  Deliver to library  Alternative address

Pickup At\*

Shipping Cost  USD

Willing to Pay

Agree to Copyright terms

Needs patron information

Request Note

Maximum Fee

Add Partners Add Rotas

Figure 35 – Resource Sharing Borrowing Request Page

- Configure the fields on both the **General Information** and **Parameters** tabs, as you would for any other resource sharing borrowing request, and click **Save**. The request displays on the Resource Sharing Borrowing Requests page.

## Support for Campus Codes as Partner Holdings Codes

### Description

When creating a partner record that uses a locate profile, you can also specify a holdings code. The holdings codes indicate the library that will be checked as part of the locate process. You can now indicate a campus code as the locate target, in addition to the existing option to define a library as the locate target. When an Alma API replies to a locate request, the holdings code indicates the library or campus that is searched during the requested resource search.

This feature enables defining resource sharing partners that are campuses of a remote institution. It enables the requester to do the following:

- Determine whether a requested resource is available at a specific campus of a potential supplier.

- Request the resource from that lender only if the resource is owned at the requested campus.

## Technical Instructions

The following roles can specify a holdings code for a locate profile when configuring a resource sharing partner:

- Resource Sharing Partners Manager

### To specify a holdings code for a locate profile when configuring a resource sharing partner:

- On the Resource Sharing Partner List page (**Fulfillment > Resource Sharing > Partners**), click **Add Partner**. The Resource Sharing Partner page opens.

The screenshot shows the 'Resource Sharing Partner' configuration page. The 'Partner Information' tab is active. Fields include: Code, Profile Type (ARTEmail), System Type (BL DSS), Average Supply Time (0), Currency, Supports Borrowing, Supports Lending, Name, Status (Active), and Delivery Delay (0). The 'Locate Profile' field is currently empty.

Figure 36 – Resource Sharing Partner Page

- In the **Locate Profile** field, search for a Locate Profile. The **Holding code** field appears.

The screenshot shows the 'Resource Sharing Partner' configuration page. The 'Partner Information' tab is active. The 'Locate Profile' field now contains the value 'urm01BC'. A new 'Holding Code' field has appeared below the 'Locate Profile' field, highlighted with a red box. Other fields like Name, Status, and Delivery Delay remain the same.

Figure 37 – Resource Sharing Partner Page — Holding Code Field

- In the **Holding code** field, enter a library or campus code.
- Configure other fields on the page, as necessary, and click **Save**. The locate process for the partner searches the library/campus indicated by the value of the **Holding code** field.

# Manage Lender Expiration Settings

## Description

An ISO partner's settings can be configured to determine when the partner's lending request will expire. In this case, the request moves on to the next partner in the rota (if one exists). This feature enables constructing dynamic rotas, where the next supplier on the rota is automatically activated if the selected potential supplier fails to respond within a configurable time frame.

The Expired Lending Requests job checks for lending requests that have expired, based on an expiration date that has been automatically communicated by the borrower in the borrower request. The request then expires on the lender side, and the borrower is automatically notified about the expiration. In response, the borrower automatically activates the next partner in the rota.

The **Expired lending request** job runs on requests that have an expiration date in the past, and which contain one of the following statuses:

- Created Lending Request
- Being Processed
- Locate Failed

If you have a lending request that you specifically do not want to expire, assign it the status **Non-Expiring**.

---

**Note:** This feature only works only with ISO partners.

---

## Technical Instructions

The following roles can specify expiration settings for a given partner:

- Resource Sharing Partners Manager

### To specify expiration settings for a partner:

- 1 On the Resource Sharing Partner List page (**Fulfillment > Resource Sharing > Partners**), click the **Add Partner** button. The Resource Sharing Partner page opens to the General Information tab.

Resource Sharing Partner

Partner Code: - Partner Name: -

General Information | Contact Information | Parameters

Partner Information

Code \*

Profile Type \* ISO

System Type \* Alma

Average Supply Time 0

Currency

Supports Borrowing

Supports Lending

Locate Profile

Name \*

Status Active

Delivery Delay 0

Figure 38 – Resource Sharing Partner Page — General Information Tab

- 2 In the **Profile type** field, select **ISO**.
- 3 Configure other mandatory fields, and click the **Parameters** tab.

Resource Sharing Partner

Partner Code: ABCDE Partner Name: ABCDE

General Information | Contact Information | Parameters

Alternative Delivery Address

Supports ADD Address

General Information

Server \*

Port \*

ISO Symbol \*

Request Expiry  No expiry  Expire by interest date  Expiry time

Figure 39 – Resource Sharing Partner Page — Parameters Tab

- 4 Under **Request expiry**, select the request expiration setting, as follows:
  - **No expiry** – The request does not expire.
  - **Expire by interest date** – The request expires on the date specified in the **Needed by** field on the Resource Sharing Borrowing Request page (displayed when creating a borrowing request).
  - **Expiry time** – The **Expiry time** field appears, where you enter a number. This value indicates the number of days after the request has been sent to the lender that the request expires.

Resource Sharing Partner

Partner Code: ABCDE Partner Name: ABCDE

General Information Contact Information Parameters

Alternative Delivery Address  
Supports ADD Address

General Information

Server \*

Port \*

ISO Symbol \*

Request Expiry  No expiry  Expire by interest date  Expiry time

Expiry Time \*

Figure 40 – Expiry Time Field

When an ISO request is sent to the lending partner, the request includes an indication of the requested expiry time, as per the value of this field.

**To monitor the Expired lending requests job and check for expired requests:**

- 1 On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Scheduled** tab. The Monitor Jobs page opens.
- 2 In the **Filter** field on the top left side of the page, select **Fulfillment** to view all Fulfillment jobs.
- 3 Locate the **Expired Lending Request** entry.

Monitor Jobs De-Activate Sele

Scheduled SP Scheduled Running History

Filter: Fulfillment

<input type="checkbox"/>	Active	Name	Job Category	Creator	Schedule	Next Run
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Requests - Handle Expiration Step	Fulfillment	exl_support	Every day at 01:00 PM	10/31/2014 01:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Loans - Due Date Correction after Calendar Change	Fulfillment	-	-	-
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notifications - Send Courtesy Notices and Handle Loan Renewals	Fulfillment	exl_support	Every day at 01:00 PM	10/31/2014 01:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulfillment - Handle Historical Archiving	Fulfillment	exl_support	Every day at 08:00 PM	10/30/2014 08:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notifications - Send Periodic Fulfillment Activity Report	Fulfillment	exl_support	Every day at 05:00 PM	10/31/2014 05:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notifications - Send Due Date Reminders	Fulfillment	exl_support	Every day at 04:00 PM	10/31/2014 04:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Requests - Restore Temporarily Shelved Items	Fulfillment	saas_admin	-	-
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Requests - Recalculate after Inventory Update	Fulfillment	exl_support	Every day at 10:00 PM	10/30/2014 10:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Loans - Change to Lost	Fulfillment	-	Every day at 05:00 AM	10/31/2014 05:00:00 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activate/Deactivate Courses	Fulfillment	-	Every Saturday at 02:00 PM	11/01/2014 02:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activate/Deactivate Courses	Fulfillment	-	Every day at 02:00 PM	10/31/2014 02:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Users - Remove Demerits Blocks	Fulfillment	-	Every day at 02:00 PM	10/31/2014 02:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Distribute central resource sharing configuration	Fulfillment	-	Every day at 01:00 PM	10/31/2014 01:00:00 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Expired lending request	Fulfillment	-	Every day at 12:00 PM	10/31/2014 12:00:00 PM

Figure 41 – Monitor Jobs Page — Expired Lending Request Entry

You can view the job's schedule in the **Schedule** column, and the job's next scheduled run in the **Next Run** column.

After the jobs runs, it displays in the **History** tab, and the job's status displays in the **Status** column.

Name	Job ID	Job Category	Creator	Submit Date	Start Date	End Date	Status
Expired lending request	951264320000121	Fulfillment	exl_support	10/30/2014 06:42:23 PM IST	10/30/2014 06:42:23 PM IST	10/30/2014 06:42:23 PM IST	Completed Successfully
Inventory Remote Storage Update - AUGMENTATION1	951263730000121	Repository	System	10/30/2014 06:00:00 PM IST	10/30/2014 06:00:00 PM IST	10/30/2014 06:00:10 PM IST	Completed with Bulks
Metadata Import w/FTP_0104121212_auto	951263560000121	Import	System	10/30/2014 05:56:00 PM IST	10/30/2014 05:56:00 PM IST	10/30/2014 05:57:40 PM IST	Completed with Errors
Metadata Import w/FTP_0104121223_man	951263550000121	Import	System	10/30/2014	10/30/2014	10/30/2014	Completed with

Figure 42 – Monitor Jobs Page — History Tab

When the job detects expired requests:

- An **Expired** ISO message is sent to the partner.
- The resource request is canceled.
- The request's status is changed to **Expired**.

When the borrower receives the Expired ISO message, it activates the next partner in the rota. If there is no additional partner in the rota, the request is considered expired.

## Configuring the Default Value of the Pickup Location Field for Borrowing Requests

### Description

When creating a borrowing request, the default value of the **Pickup Location** field can be preconfigured during resource sharing library configuration.

This functionality simplifies the request process for the requesting patron; a pickup location does not have to be manually selected with every request when the same pickup location is to be used for the majority of the requests.

## Technical Instructions

The following role can configure the default value of the Pickup Location field on the Resource Sharing Borrowing Request page:

- General System Administrator

The following roles can view the default value of the Pickup Location field when creating a borrowing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

**To configure and view the default value of the Pickup Location field when creating a borrowing request:**

- 1 On the Organization Unit Details page (**Administration > General Configuration > Configuration Menu > Add Library or Edit Library Information**), select the **Libraries** tab, click **Edit** or **Actions > Edit** for a Resource Sharing Library), locate the **Default pickup location** field.

The screenshot displays the 'Organization Unit Details' page for a 'Resource Sharing Library'. The page is divided into several sections: 'General Details', 'Resource Sharing Information', 'Borrowing Setup', and 'Lending Setup'. The 'Default Pickup Location' field is highlighted with a red box. The field is currently empty, and the dropdown menu is open, showing 'Borrowing Resource Sharing R' as the selected option. Other fields include 'Organization Unit Name' (Resource Sharing Library), 'Code' (RES\_SHARE), 'Description' (Temporarily manages inventory that is sent to or received from resource sharing partners), 'Path' (EXLDEV1.EXLDEV1\_INST.RES\_SHARE), 'Default Location for Acquisition', 'Campus', and 'Proxy'. The 'Resource Sharing Information' section includes 'Is Resource Sharing Library' (checked), 'Itemless' (unchecked), 'ISO Symbol' (ALMA\_ISO\_MAIN), 'Cancel request on locate failure' (unchecked), 'Automatically activate locate profile' (unchecked), 'Default Location' (Borrowing Resource Sharing R), and 'Default Pickup Location' (Borrowing Resource Sharing R). The 'Borrowing Setup' section includes 'Cancel request on locate failure' (unchecked) and 'Automatically activate locate profile' (unchecked). The 'Lending Setup' section includes 'Automatically Locate Resource' (unchecked) and 'Default Location' (Lending Resource Sharing Req).

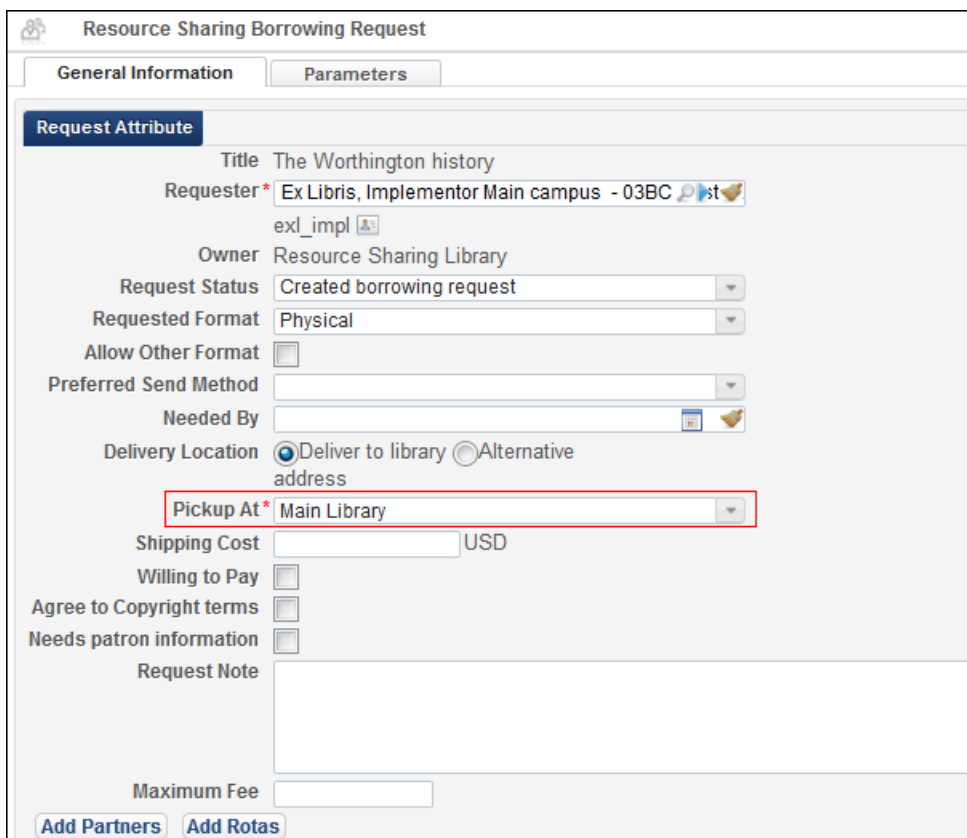
Figure 43 – Default Pickup Location Field

---

**Note:** This field displays only when you select the **Is Resource Sharing Library** check box.

---

- 2 Select the library that is to be the default pickup location for resource sharing requests from the drop down list.
- 3 Click **Save**.
- 4 Open the Resource Sharing Borrowing Request page for a request created from a search (**Fulfillment > Resource Sharing > Borrowing Requests**, select **Add > From Search** and create a request). The value displayed in the **Pickup location** field is the value selected in the **Default pickup location** field, chosen in step 2, above.



The screenshot shows the 'Resource Sharing Borrowing Request' form. The 'Request Attribute' section is expanded, showing various fields. The 'Pickup At' field is highlighted with a red box and contains the text 'Main Library'. Other visible fields include 'Title' (The Worthington history), 'Requester' (Ex Libris, Implementor Main campus - 03BC), 'Owner' (Resource Sharing Library), 'Request Status' (Created borrowing request), 'Requested Format' (Physical), 'Delivery Location' (Deliver to library), 'Shipping Cost' (USD), and 'Maximum Fee'.

Figure 44 – Resource Sharing Borrowing Request Page — Pickup At Field

## New Broker Integration Option with the Innovative INN-Reach Resource Sharing System

Alma now supports NCIP-based integration with Innovative INN-Reach resource sharing system as a broker for the resource sharing workflow. This integration is required for Alma users that are part of an INN-Reach based resource sharing network. The workflow for working with a resource sharing request managed by an INN-Reach system is the same as the workflow when working with other NCIP integrated broker resource sharing systems. Refer to the *Alma*

*Fulfillment Guide* or the Online Help for the configuration settings that are required for setting up this integration.

## Other Resource Sharing Enhancements

- It is now possible to include the patron's name in the Query to Patrons template. This can be done by using the code `%reqName%` as the placeholder for the patron name.
- When opening the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), the most recently accessed tab opens (either **Assigned to Me**, **Assigned to Others**, or **Unassigned**).
- On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests** and add a request), the **Agree to Copyright Terms** check box is optional. When selected, the ISO protocol sends a **US:CCL** value for the **Copyright Compliance** field. When not selected, the ISO protocol sends a **US:CCG** value for the **Copyright Compliance** field.

The Copyright Compliance is saved by the lender side as a **Note**.

- If a resource sharing request is for a serial item, no requestability check is done during the locate process, even if the locate profile has been configured to check requestability.
- If an item is being shipped for a lending request and a location has not been specified for the shipped item, the item's location is changed according to the move request (if one exists). If no move request exists, the default location of the request's library is used.
- The **Print Slip** option prints only the specified items, based on the following:
  - If you do not select **Manage Fulfillment Options** and do not place a request, the slip prints all of the available located items in the record.
  - If you select **Manage Fulfillment Options** and choose one of the holdings to request **Ship Physically**, only the items from that holding are printed.  
  
When a journal is selected, if you choose a specific issue, only the specific item is printed.
  - If the item has been **Shipped Physically**, only the specific shipped item is printed.

# Administration

The following sections describe the enhancements that have been made to the Administration functional area in the December 2014 release of Alma.

## Delete User Policy Settings

### Description

The Delete User Policy setting enables you to configure the system behavior when purging/deleting a user from Alma, which provides greater flexibility in maintaining reportable data. You can choose to retain all of a users' data in the system, retain only statistical data, or remove all data from the system.

The selected setting takes effect on users deleted through the Purge Users job, API, or manually deleted in Alma. When raising the Delete User Policy setting (that is, changing the setting to remove more data), the setting is also invoked on users previously deleted in the system.

### Technical Instructions

The following roles can configure delete user policy settings:

- User Administrator
- General System Administrator

#### To configure Delete User Policy settings:

- 1 Open the Delete User Policy page (**Administration > User Management Configuration > Configuration Menu > General > Delete User Policy**).

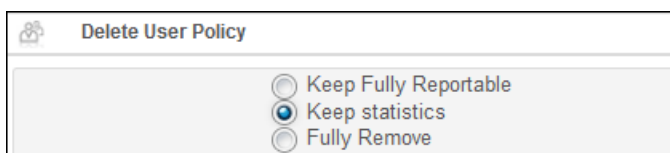


Figure 45 – Delete User Policy Page

- 2 Select a delete user policy setting:
  - **Keep Fully Reportable** – The user's status is **Deleted**; all requests are canceled, and the identifying string is deactivated. The rest of the user's data is retained in the system.  
This is the default setting when deleting users in institutions previously configured with Alma.

- **Keep Statistics** — The user's statistical data is retained – that is, data is deleted on all tabs on the User Details page except for the **Statistics** tab and other non-identifying statistical data, such as the user group and job category.

This is the default setting when deleting users in institutions newly configured with Alma.






- **Fully Remove** — Removes all user data upon deletion, including statistical data.
- 3 Click **Save and Execute**. The selected delete user policy is invoked for all users purged in the system, both manually and via the **Purge user records** job.

## Enhancements to the Monitor Jobs Page

### Description

A new jobs infrastructure is being implemented over the next few months. The new infrastructure will provide a consistent look for all job reports and make them clearer and more readable. Icons will present an immediate indication of the job's result status.

The following enhancements have been implemented for the December release:

- The **Completed** tab has been renamed to **History** tab.
- The **Job ID** column has been added.
- The **Failed Records** column has been removed.
- The **Failed** status has been added.
- The following new icons are displayed with the statuses in the **Status** column:
  -  Completed Successfully
  -  Completed With Errors
  -  Completed With No Bulks
  -  Completed with Warnings
  -  Failed
- The status with the icon on a colored background is now displayed in the job report.

## Technical Instructions

The following roles have access to the Monitor Jobs page and can monitor the jobs that are relevant to their roles:

- General System Administrator
- Repository Manager
- Catalog Manager
- Catalog Administrator
- Requests Operator
- Purchasing Operator
- Purchasing Manager
- Acquisitions Administrator

### To access this feature:

- 1 Open the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**). The following is displayed:

Name	Job ID	Submit Date	Start Date	End Date	Status	Actions
P.O Line - Claiming	955047350000121	11/16/2014 05:00:01 PM IST	11/16/2014 05:00:01 PM IST	11/16/2014 05:00:19 PM IST	Failed	Actions
Publishing Platform Job test1	955047340000121	11/16/2014 05:00:01 PM IST	11/16/2014 05:00:01 PM IST	11/16/2014 05:00:24 PM IST	Completed Successfully	Actions
Publishing RSS feed RSS Feb.7	955047330000121	11/16/2014 05:00:01 PM IST	11/16/2014 05:00:01 PM IST	11/16/2014 05:00:18 PM IST	Completed Successfully	Actions
Activate/Deactivate Courses	955047250000121	11/16/2014 05:00:00 PM IST	11/16/2014 05:00:00 PM IST	11/16/2014 05:00:19 PM IST	Completed with Errors	Actions
Notify E-Activation due task	955046530000121	11/16/2014 04:00:01 PM IST	11/16/2014 04:00:01 PM IST	11/16/2014 04:00:32 PM IST	Completed Successfully	Actions

Figure 46 – Monitor Jobs

- 2 To display the job results, select **Actions > Report**.

ExLibris Alma QA

Tasks Analytics Currently at: Resource Sharing Library - ...

Job Report

**Completed Successfully**

Process ID 955070310000121  
 Started on 11/17/2014 09:00:00 AM IST  
 Total run time 1 Minutes 40 Seconds  
 Status Completed Successfully

Name PO Line - Deferred  
 Finished on 11/17/2014 09:01:40 AM IST  
 Created by System  
 Status date 11/17/2014 09:01:40 AM IST

Records processed 0 Records with exceptions 0

Job Events  
 Export To Excel

Figure 47 – Job Report

## Restrict Login to an Alma Institution Based on IP Addresses

### Description

It is now possible to restrict login access to Alma according to IP addresses. This allows an institution to restrict the locations from which Alma can be accessed and provides for greater security.

Two new links have been added to the General Configuration menu for this development – **IP Group Configuration** and **Login Restriction Configuration (Administration > General Configuration > Configuration Menu > Security)**.

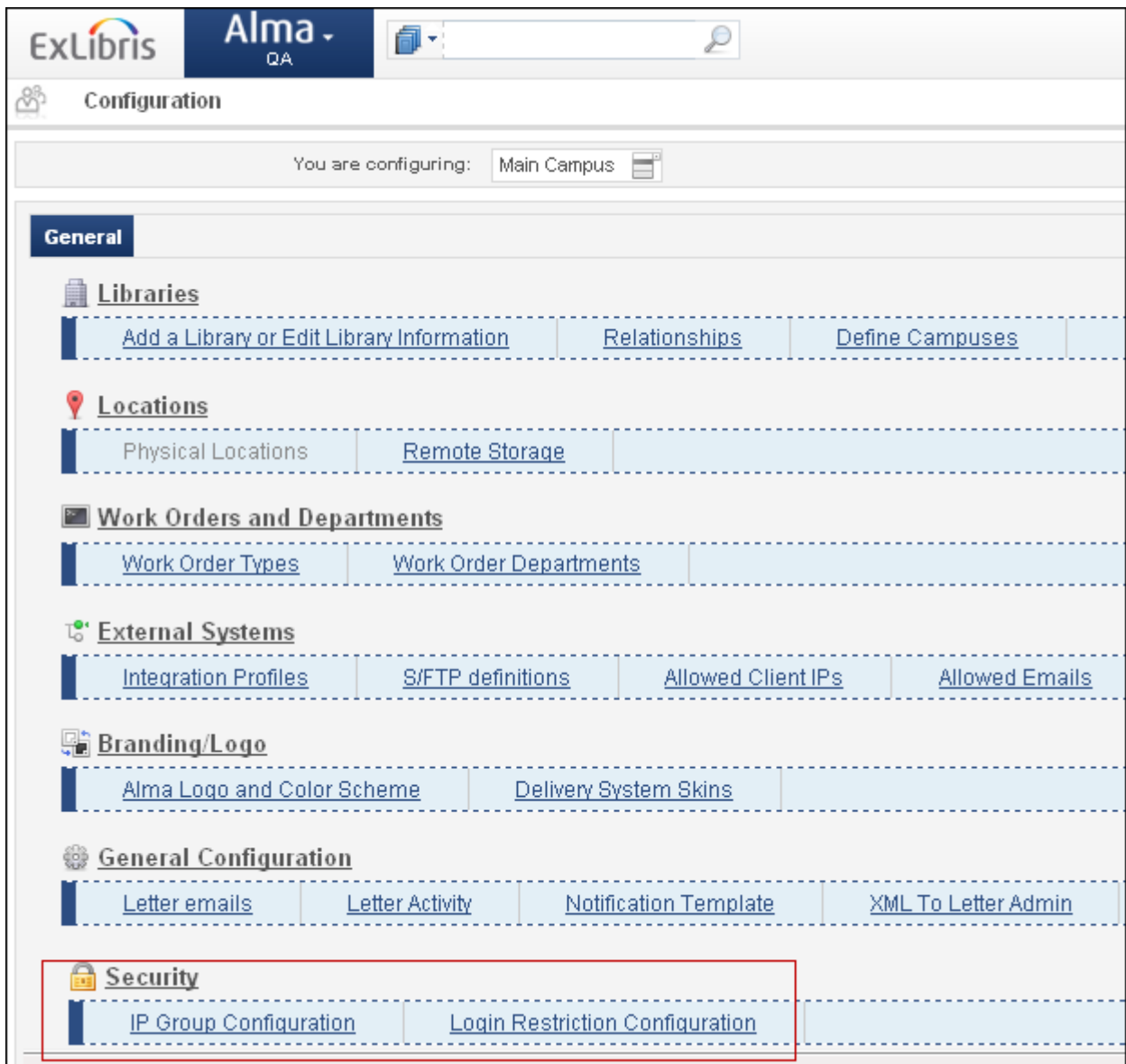


Figure 48 – IP Group Configuration and Login Restriction Configuration

## Technical Instructions

Only the General Administrator role can access this enhancement.

There are two steps in configuring this feature. First you must define the allowed IP groups and then you must configure login access for these groups.

### To define allowed IP groups:

- 1 From the IP Group Configuration page (**Administration > General Configuration > Configuration Menu > Security > IP Group Configuration**), click **Add IP Group**. The following is displayed:

**Figure 49 – Add IP Group**

- 2 Fill in the following fields:
  - Group code – A code for the IP group
  - Group name – A name for the IP group that can be changed later
  - IP version – Currently only IPv4 is available
  - IP match criteria – A specific IP address or an IP range (two valid IP addresses separated by a hyphen)
- 3 Click **Add IP Definition to Group**.
- 4 Repeat steps 2 and 3 as necessary.
- 5 Click **Add** or **Add and Close**.

The IP group is added to the list of IP groups on the IP Group Configuration page.

**To configure login access for allowed IP groups:**

- 1 Open the Login Restriction Configuration page (**Administration > General Configuration > Configuration Menu > Security > Login Restriction Configuration**). The following is displayed:

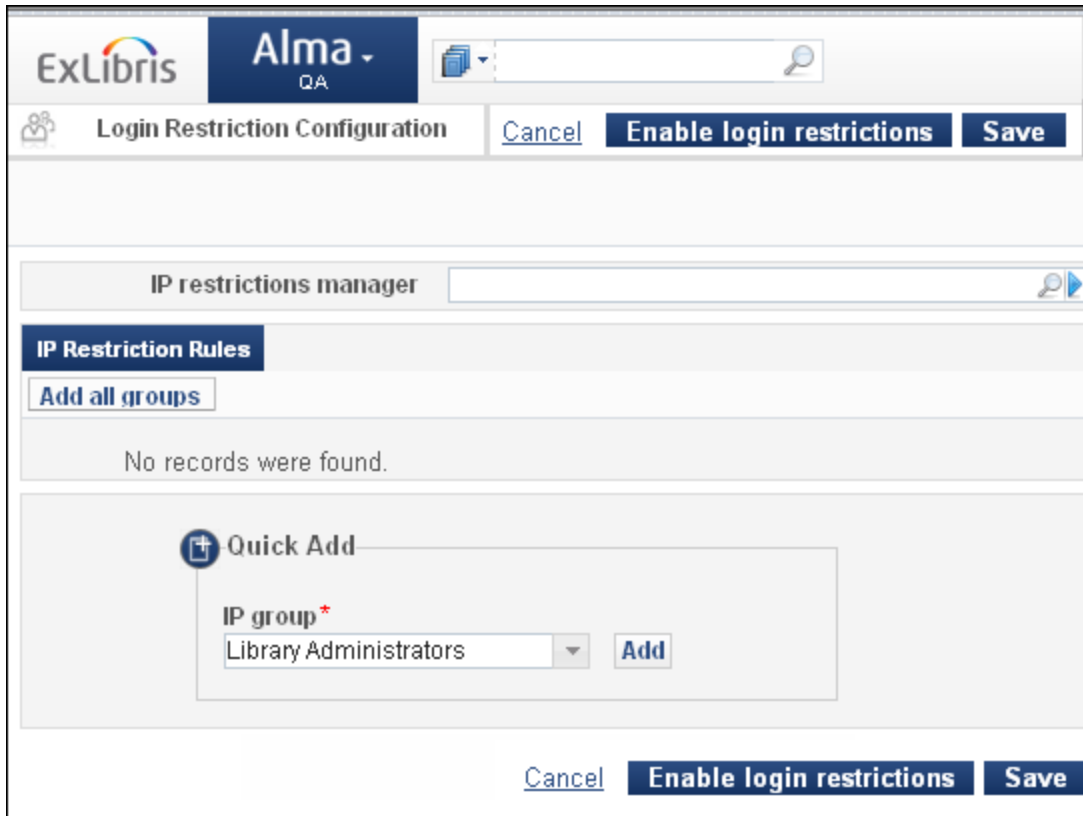


Figure 50 – Login Restriction Configuration

- 2 Select the IP groups from the **IP group** drop-down list whose IP addresses you want to allow login access and click **Add**, or click **Add All Groups** to add all the IP groups.
- 3 Select a manager from the **IP restrictions manager** list. This manager receives the message sent by users when a login attempt is made from a restricted IP address.
- 4 Click **Save**.
- 5 Click **Enable Login Restrictions**.

---

**Notes:**

- You must click **Enable Login Restrictions** for the IP login restrictions to take effect.
  - Users with the General Administrator role are not restricted.
- 

If a user with a restricted IP address attempts to log in to Alma, the following message is displayed:

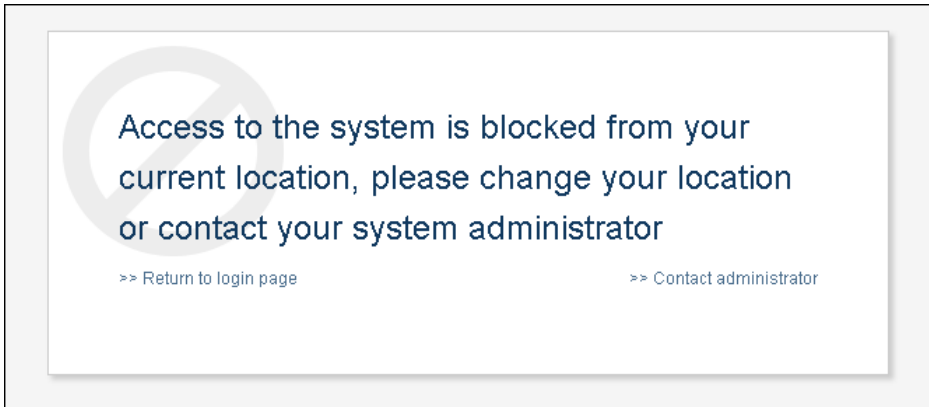


Figure 51 – Access Blocked

6 Click **Contact Administrator**. The following is displayed:

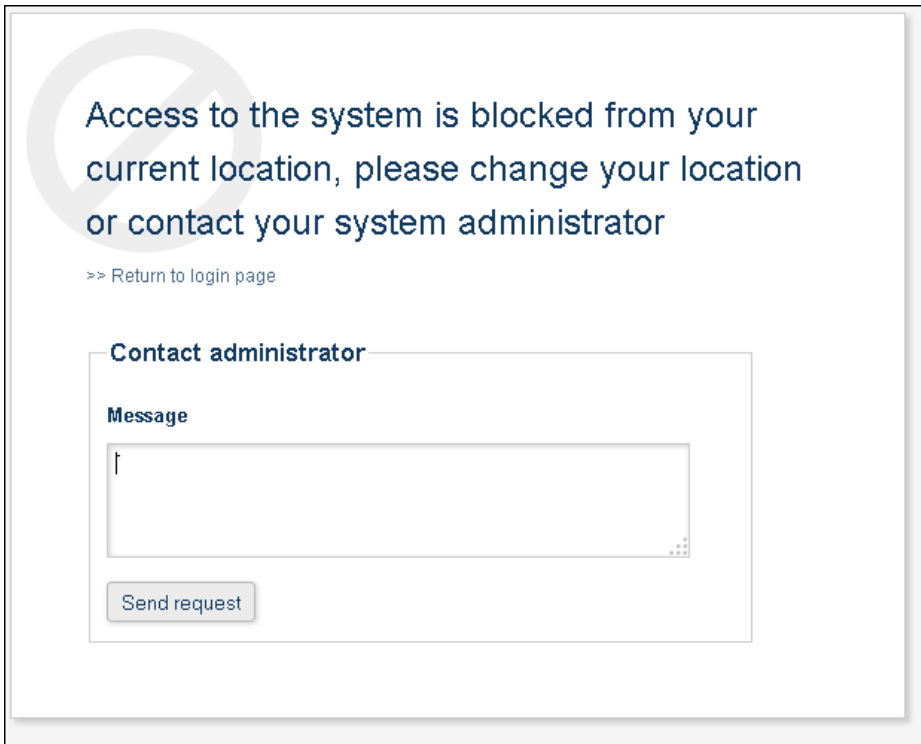


Figure 52 – Contact Administrator

7 Enter a message and click **Send Request**.

**To configure a user to not have IP restrictions apply:**

1 Open the User Details page (**Administration > User Management > Find and Manage Users > Actions > Edit**). The following is displayed:

The screenshot shows the Alma QA interface for user management. At the top, the ExLibris logo and 'Alma QA' are visible. The page title is 'User Details'. Below this, there is a profile card for 'Robert J, Aaronson' with a placeholder image, the status 'External', and a link to 'Manage fulfillment activities'. The user group is 'STUDENT GRADUATE'. Below the profile card are tabs for 'General Information', 'Contact Information', 'Identifiers', 'Notes', and 'Blocks'. The 'General Information' tab is active, showing a 'User Information' section with fields for 'First name' (Robert J), 'Last name' (Aaronson), 'PIN number' (with a 'Generate' button), 'Job category', 'Gender', 'Campus', 'Preferred language', 'Status date' (07/17/2011), 'Expiration date' (-), and 'Resource sharing library'. At the bottom of this section, it says 'Created By: exl\_impl (10/18/2006)'. Below the 'User Information' section is the 'User Management Information' section, which contains a checkbox labeled 'Disable all login restrictions' that is currently unchecked.

Figure 53 – Login Restriction Configuration

- 2 Select the **Disable all login restrictions** check box, and click **Save**.  
IP restrictions will not apply to the user.

## Other Administration Enhancements

- Support for passive mode FTP connections was added. To enable the client IP to work in passive mode, select the Passive mode check box in the FTP definition profile. Note that the default mode is active mode.
- The list of statistical types in a statistical category is now filtered to display only the statistical types associated with the specified statistical category, and not types associated with other categories.

# Analytics

The following sections describe the functions provided for Analytics in the December 2014 release of Alma.

## New Events – Z39 Searches Dashboard

### Description

The Z39 Searches dashboard has been added to Alma Analytics. This dashboard is used to display a report of the incoming Z39 searches conducted between selected dates.

### Technical Instructions

The Design Analytics role can access this enhancement.


#### To access this feature:

- 1 From the Alma dashboard, select **Catalog > Shared Folders > Alma > Events > Z39 Searched > Open**. The following is displayed:



\* Z39 Search Date Between  -   
Apply Reset

Figure 54 – Z39 Search Box

- 2 Click the Calendar icon  and enter the dates between which you want to search for Z39 searches.
- 3 Click **Apply**.

A report of the Z39 searches performed between the dates you entered is display. For example:

Z39 Search Date	Event Id	IP	Query	# Hits
7/22/2014	884692060000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 62	62
	884692100000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 0 5678</term></apt></rpn></query>	0
7/31/2014	907815690000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 8 type="general">dinosaur</term></apt></rpn></query>	8
	907815740000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 8 type="general">dinosaur</term></apt></rpn></query>	8
	907815790000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 8 type="general">dinosaur</term></apt></rpn></query>	8
	907815840000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 8 type="general">dinosaur</term></apt></rpn></query>	8
	907815890000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 8 type="general">dinosaur</term></apt></rpn></query>	8
	907815940000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 378 type="general">Israel</term></apt></rpn></query>	378
	907815990000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><term type="g 378	378
	907816050000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><term type="g 378	378
	907816100000121	10.1.235.196	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 378 type="general">Israel</term></apt></rpn></query>	378
	907816150000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 378 type="general">Israel</term></apt></rpn></query>	378
	907816210000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 2 type="general">Asaf</term></apt></rpn></query>	2
8/3/2014	908276210000121	10.1.117.194	<xml-fragment><x_select><element>control</element><object_type>0 object_type="BIB_MMS"><x_condition operator="AND"><type>contain- Bodfish</value></x_condition></x_where></xml-fragment>	0
	908277140000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><term type="g 378	378
	908342000000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 378 type="general">Israel</term></apt></rpn></query>	378
	908342080000121	127.0.0.1	<?xml version="1.0"?> <query><rpn set="Bib-1"><apt><attr type="1" 378 type="general">Israel</term></apt></rpn></query>	378

Figure 55 – Z39 Search Example Report

## New Course Reserves Subject Area

### Description

The new Course Reserves subject area has been added to Alma Analytics. The fields of this subject area can be used to create reports concerning courses and reading lists. The following are examples of business questions that can be answered from the Course Reserves subject area:

- How many times were items linked to a reserved title loaned?
- Which courses reserved a specific title?
- Which courses share the same titles?
- What are the reading lists per department?

## Technical Instructions

The Design Analytics role can access this enhancement.

To access the Course Reserves subject area in Alma Analytics:

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

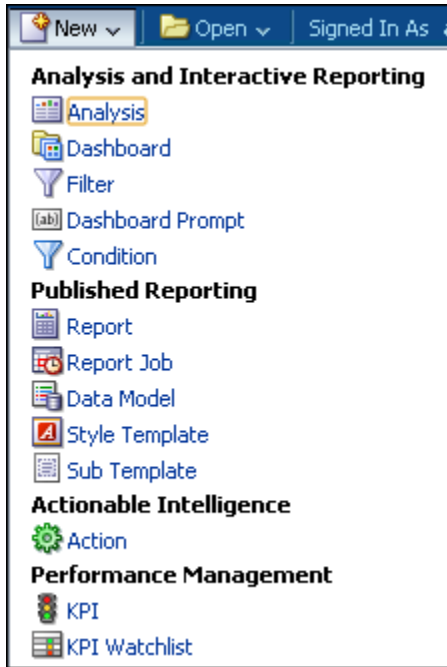


Figure 56 – New > Analysis Option

The Select Subject Area options are displayed.

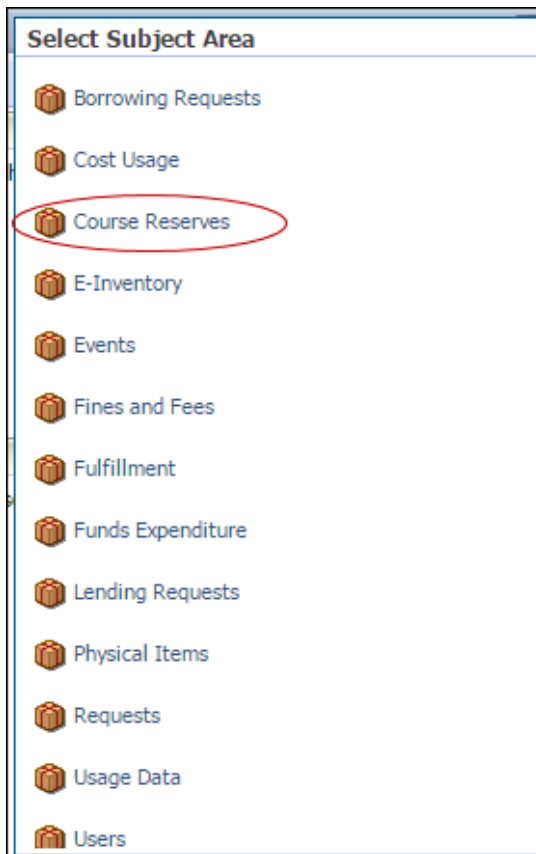


Figure 57 – Select Subject Area

### 3 Select **Course Reserves**.

The following dimensions are available:

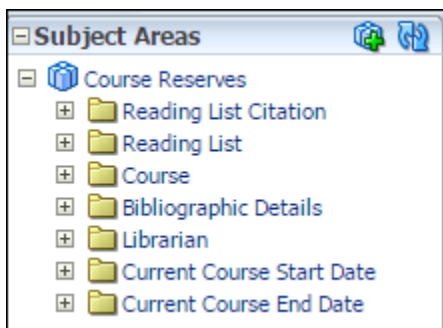


Figure 58 – Course Reserves Subject Area

The following is an example of a report from the Course Reserves subject area:

Course Name	Last Name	First Name	Reading List Name	Number Of Citations	Current Course Start Date	Current Course End Date
American History I	Parson	Chris	American History 1	12	9/3/2012	12/20/2012
Art Modern			Cubisme	2	10/8/2014	10/8/2015
Australian Library Science	Smith	Joseph	Australian Libsci RL 2	4	2/18/2014	2/17/2015
			Australian Libsci RL 2(1)	1	2/18/2014	2/17/2015
Biology Course	Benson	Jim	Biology	17	1/31/2013	12/30/2013
			Biology(1)	14	1/31/2013	12/30/2013
Calculus for Physics	Parson	Chris	Calculus for Physics	12	3/28/2012	7/26/2012
Communication Arts	Parson	Chris	Communication Arts 101	2	1/6/2014	5/16/2014
Early American History	Parson	Chris	Early American History	5	9/2/2014	12/18/2014
Economics	Bennet	Dawn	Economics	9	3/1/2011	12/13/2014
Economics 102	Parson	Chris	Econ 101 Reading List	11	11/7/2011	1/16/2012
History 101	Parson	Chris	History Reading List	10	1/6/2013	3/30/2013
Human Biology			Biology	15	5/15/2013	4/30/2015
Human Biology Course	Parson	Chris	Human Biology	7	1/1/2013	12/31/2014
			Biology Course	6	2/1/2013	12/31/2013
Linguistics 101			Lynn Higgins	2	8/7/2012	5/7/2013
Literature 102	Director	Library	Literature 102	5	5/22/2013	4/30/2014
	French	Andrew	Literature 102(1)	20	5/22/2013	4/30/2014
Management Course	Benson	Jim	Professor Smith's Readin	12	9/5/2014	9/30/2015
Medieval Art	Benson	Jim	Medieval Art Reading Lis	7	10/7/2014	12/7/2014

Figure 59 – Course Reserves Example Report

---

**Note:** Title and other bibliographic details of non-repository citations are not displayed in reports, although the title is displayed in Alma.

---

## Course Reserves Fields Added to Fulfillment and Requests Subject Area

The following two fields concerning course reserves have been added to the Fulfillment subject area in the Loan Details dimension and Requests subject area in the Requests Details dimension:

- Associated Course Code
- Associated Course Name

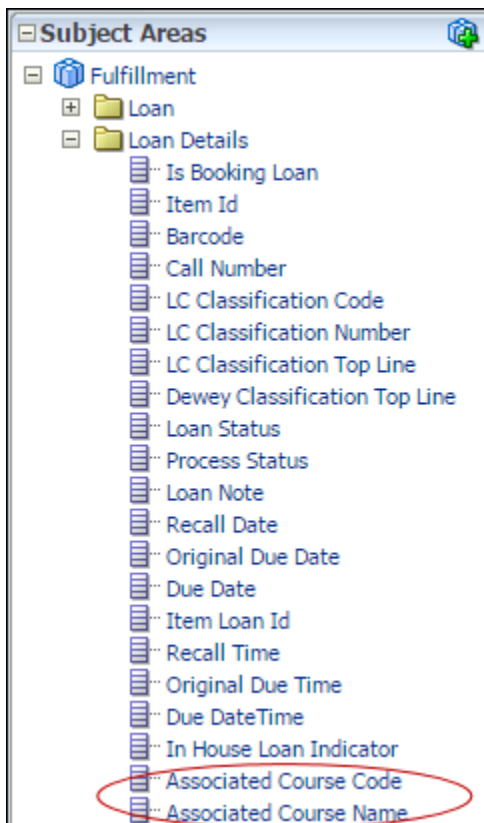


Figure 60 – Fulfillment Associated Course Code and Name

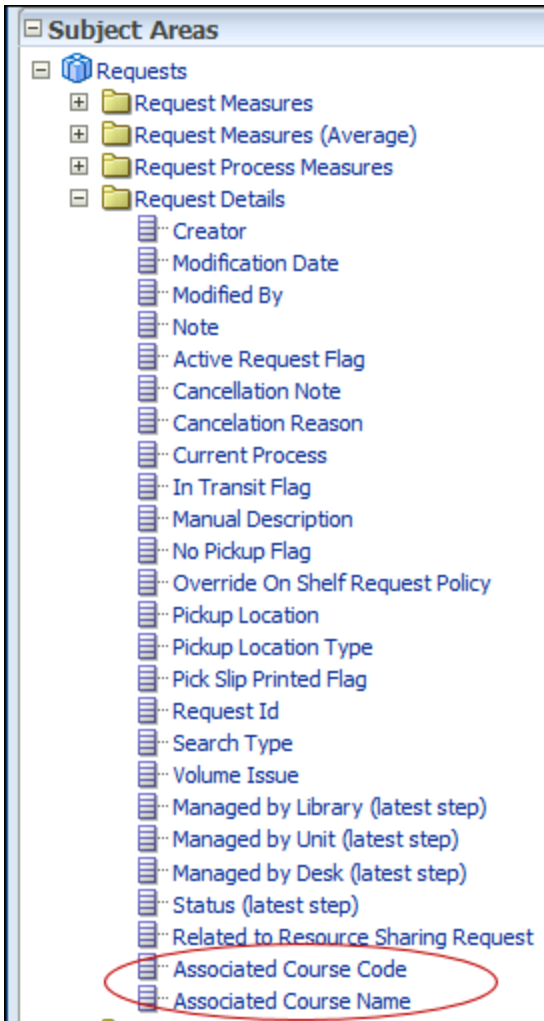


Figure 61 – Requests Associated Course Code and Name

These fields allow you to create reports that display how often an item is used after being put on reserve to help you determine if the library needs to put more or less copies of the item on reserve.

The following is an example of a report using these fields:

Creator	Associated Course Code	Associated Course Name
MichalG613	HIST 200	Modern European History
	Nurs 351	Pathophysiology / Psychopathology I
	ECO-101	Economics
TomS613	HUM201	Human Bioloav Course
admin1	ECO-101	Economics
andrewfrench	HIST 201	Early American History
	HUM201;Nurs 351	Pathophysiology / Psychopathology I;Human Biology Course
anna	HUM201;LIT102	Human Biology Course;Literature 102
aoliver	ECO-101	Economics
aschmidt	HIST 201	Early American History
	HUM201;LIT102	Human Biology Course;Literature 102

Figure 62 – Associated Course Code and Name Example Report

## Request for Course Dimension Added to Requests Subject Area

The Request for Course dimension has been added to the Requests subject area. The fields of this dimension relate to requests that staff submit in order to process a reading list, for example, to move items from an open shelf to a reserve location.

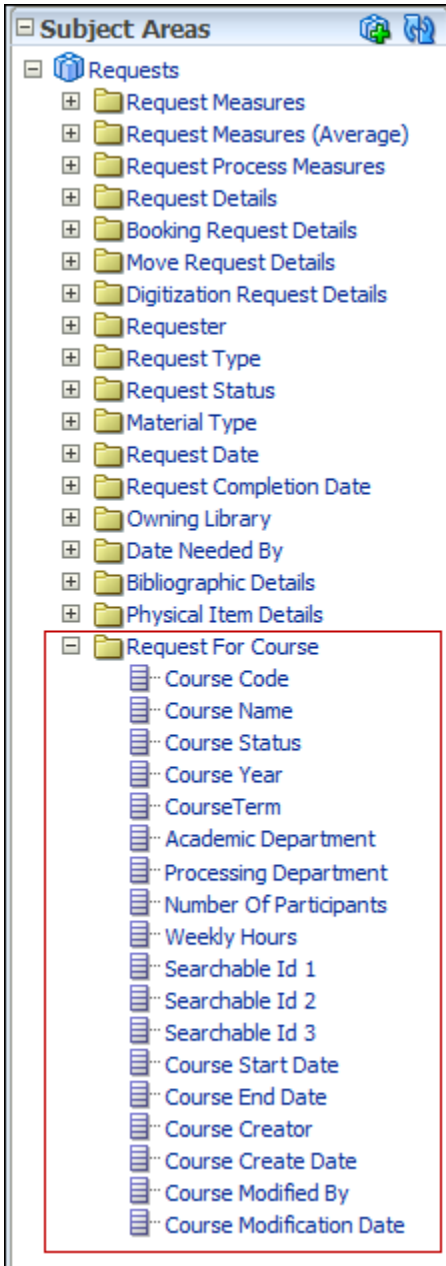


Figure 63 – Request for Course

You can use the Request for Course dimension fields to create reports that display information about requests to put items on reserve. The following is an example of a report using fields from the Request for Course dimension:

Creator	Course Code	Course Name	Course Start Date	Course End Date
CinziaC	MGT101	Management Course	9/5/2014 3:50:08 AM	9/30/2015 3:50:08 AM
annaa	HIST-101	American History I	9/3/2012 11:18:22 PM	12/20/2012 11:18:22 PM
aoliver	HIST 201	Early American History	9/2/2014 11:14:43 PM	12/18/2014 11:14:43 PM
aschmidt	Bio101	Biology Course	1/31/2013 11:12:07 PM	12/30/2013 11:12:07 PM
bsmith	UCCA101	Communication Arts	1/6/2014 8:20:40 AM	5/16/2014 8:20:40 AM

Figure 64 – Request for Course Example Report

## Transaction Item Subtype Field Added to Funds Expenditure Subject Area

### Description

There are five transaction item types in Alma:

- Allocation – when assigning money to a fund
- Transfer – when money is moved from one fund to another
- Encumbrance – when reserving money for a purchase
- Disencumbrance – when releasing encumbered money
- Expenditure – when money is spent

Until now, when creating reports with the Transaction Item Type field, transactions item types both of type Allocation and Transfer would be displayed as **Allocation**, and transactions item types of both type Encumbrance and Disencumbrance would appear as **Encumbrance**. With the new Transaction Item Subtype field you can display whether the item transaction type is actually Allocation or Transfer and whether the item transaction type is actually Encumbrance or Disencumbrance.

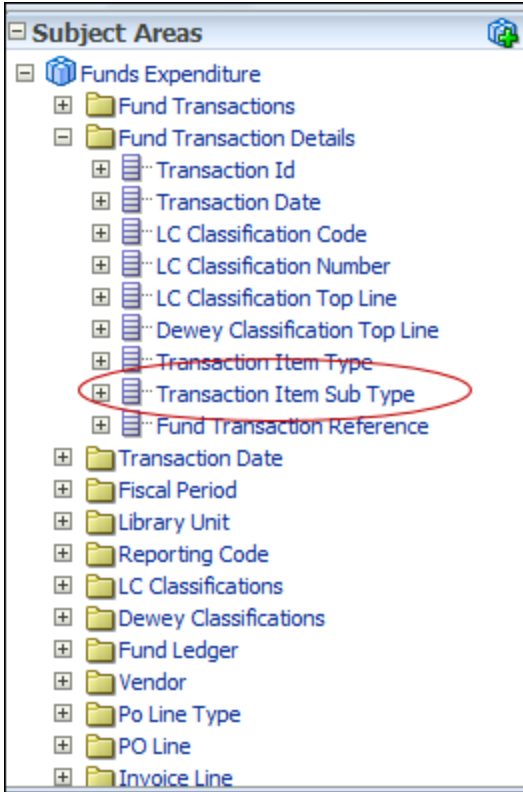


Figure 65 – Transaction Item Subtype

## Technical Instructions

The Design Analytics role can access this enhancement. The following is an example of report that displays the transaction item type and the transaction item subtype:

Transaction Id	Transaction Item Type	Transaction Item Sub Type
12509160000121	ALLOCATION	ALLOCATION
274548650000121	EXPENDITURE	EXPENDITURE
274549650000121	ENCUMBRANCE	DISENCUMBRANCE
27460890000121	ALLOCATION	TRANSFER
27460900000121	ALLOCATION	TRANSFER
278889070000121	ENCUMBRANCE	ENCUMBRANCE
283262700000121	ENCUMBRANCE	ENCUMBRANCE
28429530000121	ALLOCATION	TRANSFER
28429540000121	ALLOCATION	TRANSFER

Figure 66 – Transaction Item Subtype Example Report

# Transaction ID Field Added to Funds Expenditure Subject Area

The Transaction ID field has been added to the Transaction Details dimension of the Funds Expenditure subject area.

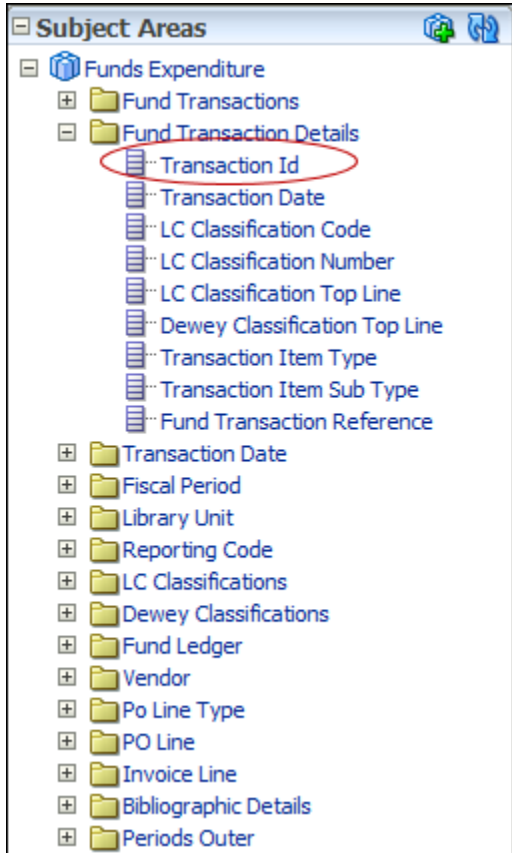


Figure 67 – Transaction ID

This field is taken from Alma when receiving payment for fines and fees (**Fulfillment > Checkout/Check-in > Manage Patron Services**):

**Payment Details**

Operator name Support, Ex Libris

All fines  Specific fines

Fines to pay

User balance 0.00 USD

Payment method Cash

Add change to balance

Payment amount \*  USD

**Transaction ID**

Comment

Figure 68 – Transaction ID – Receiving Payment for Fines And Fees

The following is an example of a report using the Transaction ID field:

Transaction Id	Transaction Date	Transaction Amount
106326100000121	12/12/2012 12:00:00 AM	300
106815910000121	12/17/2012 12:00:00 AM	-50
106815920000121	12/17/2012 12:00:00 AM	50
107200200000121	12/19/2012 12:00:00 AM	100
12509160000121	6/16/2011 12:00:00 AM	15,000
12509220000121	6/16/2011 12:00:00 AM	40,000
12509520000121	6/16/2011 12:00:00 AM	50,000
12509540000121	6/16/2011 12:00:00 AM	20,000
12509810000121	6/16/2011 12:00:00 AM	5,000
12509890000121	6/16/2011 12:00:00 AM	60,000
12509920000121	6/16/2011 12:00:00 AM	30,000
12509940000121	6/16/2011 12:00:00 AM	20,000
12509960000121	6/16/2011 12:00:00 AM	5,000

Figure 69 – Transaction ID Example Report

## Creation Date and Activation Date Enhancements

### Description

The following changes have been implemented to the Activation Date and Creation Date dimension in the E-Inventory subject area:

- If the **Creation Date** and **Activation Date** fields are left empty, they appear as a blank (null value) in the report rather than 1/1/11 as they did previously.
- The order of the fields has been changed to be clearer and more logical.

- The words **to be deprecated** have been added to fields that will be deprecated in the near future. These columns should not be used.
- The names of all date fields, as displayed in the following table, have been modified to be clearer. (Previously, users needed to rename the field when creating reports since all date fields were named `date key xxx`. The names are now comprehensible.)

New Name	Previous Name
Portfolio Creation/Activation Date	Date Key
Portfolio Creation/Activation Month Key	Month Key
Portfolio Creation/Activation Month	Month Desc
Portfolio Creation/Activation Full Month	Full Month Desc
Portfolio Creation/Activation Quarter	Quarter Desc
Portfolio Creation/Activation Year	Year Desc
Portfolio Creation/Activation Fiscal Year	Fiscal Year Desc

---

**Note:** These changes are planned for all the date fields across all subject areas as part of the analytics roadmap to create a consistent experience for report creation.

The changes in the names of the fields should have no impact on existing reports that use these fields, unless the fields were used as part of an SQL statement. If you nevertheless experience errors with existing reports, it is recommended that you try to replace the existing fields with the renamed ones.

---

## Technical Instructions

The Design Analytics role can access this enhancement.

**To access the Portfolio Creation Date and Portfolio Activation Date dimensions in Alma Analytics:**

Select **E-Inventory > Portfolio Creation Date** or **Portfolio Activation Date**.

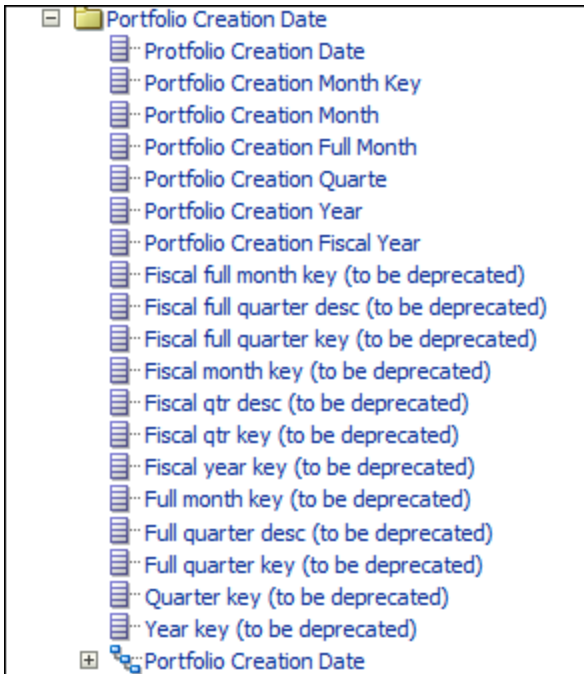


Figure 70 – Portfolio Creation Date

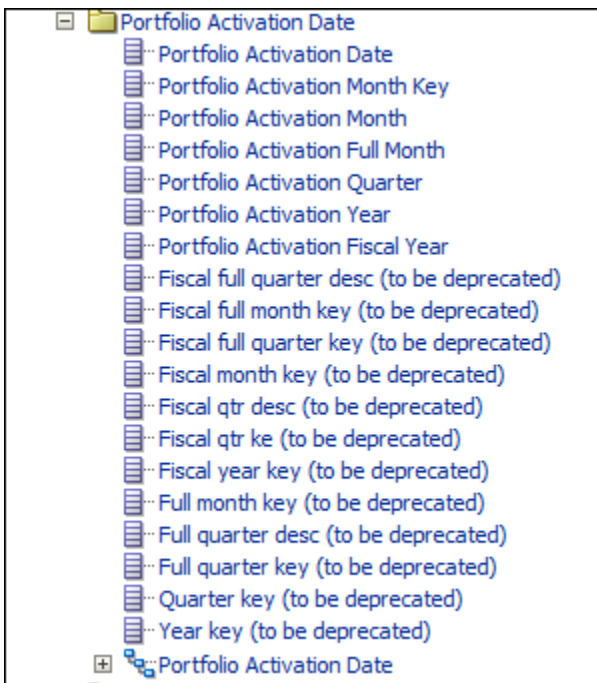


Figure 71 – Portfolio Activation Date

## User Details Retained After Anonymization

Academic institutions store information about individuals, including personal details and information about their activities. Due to privacy concerns, such data must be anonymized on a regular basis.

Alma offers the option to delete such user information for fulfillment and resource sharing activities. The information is deleted for activities that have been completed, such as completed loans or resource sharing borrowing requests.

You can configure Alma to delete the more specific information (for example, User ID) and retain the more general user information (for example, User Group and Job Title).

The following fields are not deleted even when performing anonymization:

- User Type
- User Group
- Campus Code
- Job Title
- Statistical Category 1
- Statistical Category 2
- Statistical Category 3
- Statistical Category 4
- Statistical Category 5

The information not anonymized can be included in analytics reports.

For more information concerning anonymization, see the **Configuring Fulfillment Jobs** section of the *Alma Fulfillment Guide* or in the Online Help.

## Coverage Statement Field Added to the E-Inventory Subject Area

### Description

The Coverage Statement field has been added to the Portfolio dimension of the E-Inventory subject area. This field contains the coverage statement type.

For more information concerning the coverage statement type, see the **Modifying a Portfolio Using the Electronic Portfolio Editor** section of the *Alma Resource Management Guide* or the Online Help.

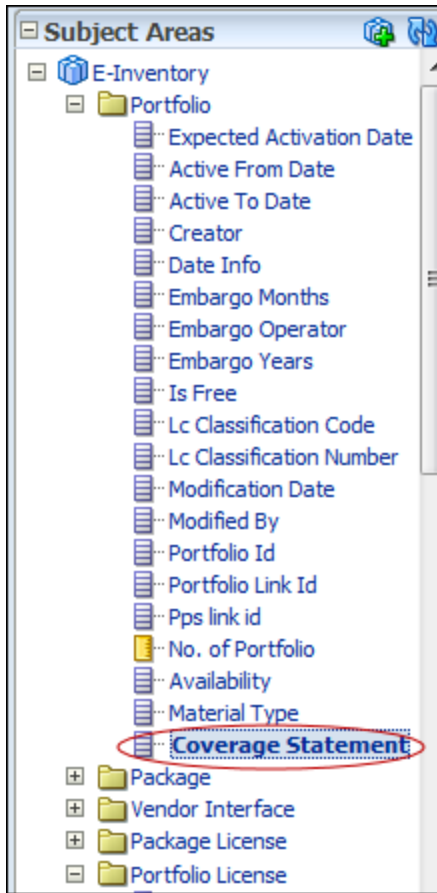


Figure 72 – Coverage Statement

## Technical Instructions

The Design Analytics role can access this enhancement.

Coverage statement information is taken from Alma in the Coverage Information tab when editing electronic portfolios.

Figure 73 – Coverage Information Tab

The following is an example of report using the Coverage Statement field:

Coverage Statement	Portfolio Id
ONLY global	5322159830000121
	5322159850000121
	5322159880000121
	5322159900000121
	5322159940000121
	5322331080000121
	5322331100000121
	5322331120000121
	5322331140000121
	5322331160000121
	5322331180000121
	5322331200000121
	5322331220000121

Figure 74 – Coverage Statement Example Report

## Enhancements to E-Inventory Dimensions

Two enhancements have been made to E-Inventory dimensions:

- The Library Unit dimension has been renamed to the Portfolio Library Unit.
- The Electronic Collection Library Unit dimension has been added. It contains information on electronic collections.

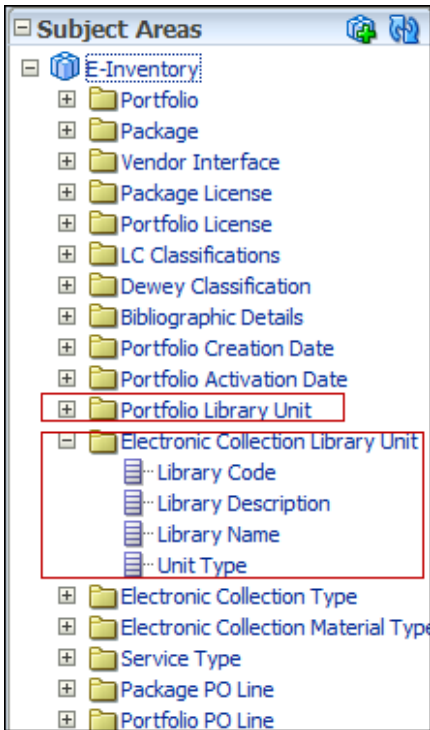


Figure 75 – Portfolio Library Unit and Electronic Collection Library Unit

The following is an example of a report using the fields of the Electric Collection Library Unit:

Library Code	Library Name	Unit Type
UARC	Art Library	LIBRARY
UEDUC	Education Library	LIBRARY
UELEC	Electronic Resources	LIBRARY
UGDOC	Social Sciences	LIBRARY
UHLTH	Medical Library	LIBRARY
ULAW	Law Library	LIBRARY
ULINC	Main Library	LIBRARY
UMUSI	Music Library	LIBRARY
UPHY	Physics Library	LIBRARY
USCI	Science Library	LIBRARY

Figure 76 – Electronic Collection Library Unit Example Report

## Enhancements to the Users Subject Area

The following enhancements have been implemented to the Role dimension in the Users subject area:

- The **Scope** field now contains the name of the library or the institution.
- The **Library Code** field has been renamed **Scope Code** and contains the code of the scope.
- The **Library ID** and **Library Name** fields have been marked as to be deprecated. They will be removed in a future release.

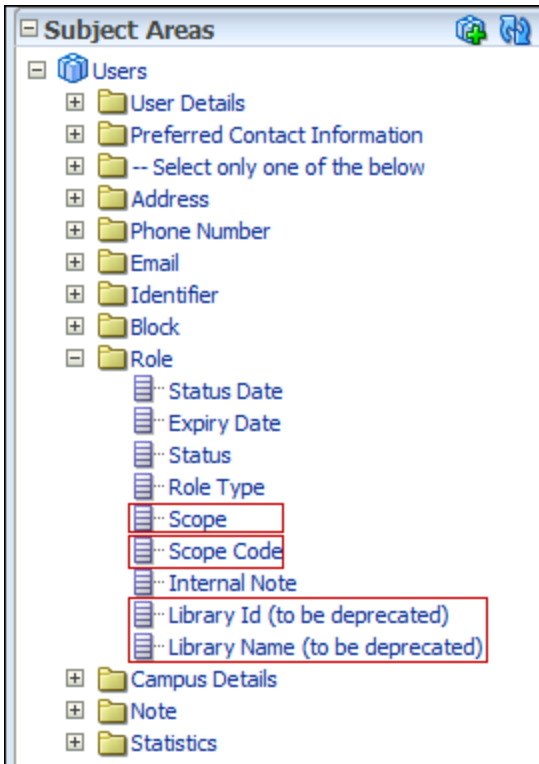


Figure 77 – Role

The following is a report using the Scope and Scope Code fields:

Primary Identifier	Scope	Scope Code
100033	Biology Library (BIO)	BIO
	Graduate Library (GRAD)	GRAD
	Main Library	MAIN
	Media Center Library (MDTC)	MDTC
	Music Library (MUS)	MUS
	Rare Books Library (RARE)	RARE
100087	Main Library	MAIN
100106	Biology Library (BIO)	BIO
	Graduate Library (GRAD)	GRAD
	Main Library	MAIN
	Media Center Library (MDTC)	MDTC
	Music Library (MUS)	MUS
	Rare Books Library (RARE)	RARE
100117	Biology Library (BIO)	BIO
	Graduate Library (GRAD)	GRAD
	Main Library	MAIN
	Media Center Library (MDTC)	MDTC
	Music Library (MUS)	MUS
	Rare Books Library (RARE)	RARE
1111	Main Library	MAIN
1123454	Main Library	MAIN
12345	Main Library	MAIN
123456	Main Library	MAIN
1414935607	Media Center Library (MDTC)	MDTC

Figure 78 – Scope and Scope Code Report Example

# Fund Transaction Reference Field Added to Fund Expenditure Subject Area

## Description

The Fund Transaction Reference field has been added to the Fund Transaction Details dimension of the Funds Expenditure subject area.

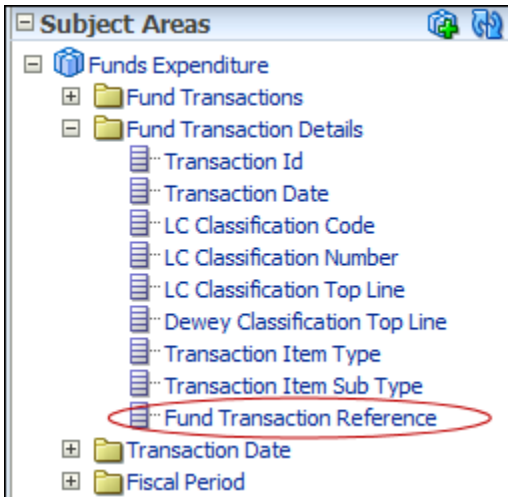


Figure 79 – Fund Transaction Reference

## Technical Instructions

The Design Analytics role can access this enhancement.

Fund Transaction Reference information is taken from Alma from the Transaction reference number field when adding an allocation to a fund (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers > Transactions tab > Add Transaction > Allocation**):

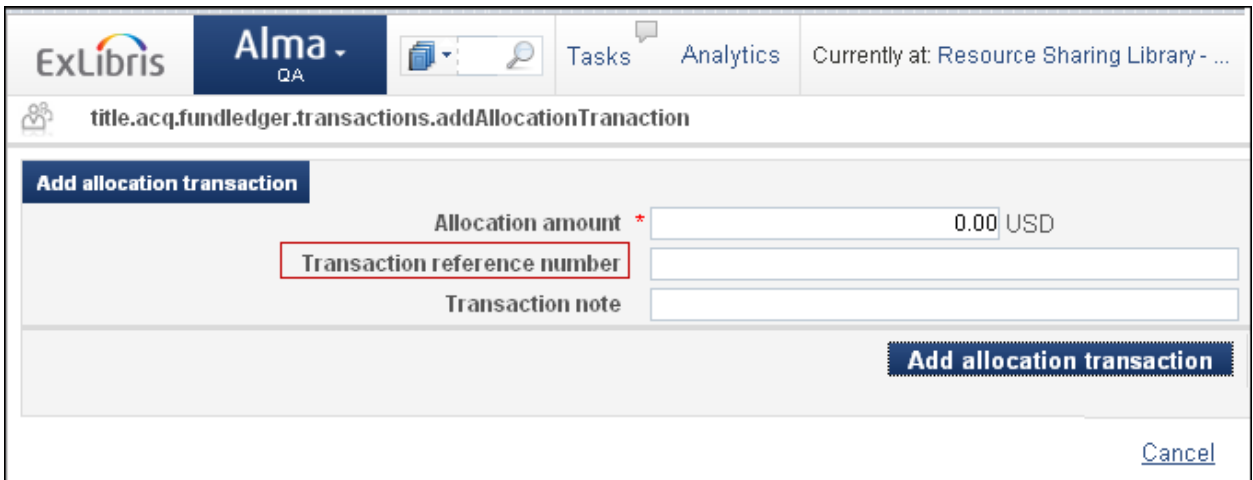


Figure 80 – Transaction Reference Number

The following is an example of a report using the Fund Transaction Reference field.

Fund Transaction Reference
#709075
2500 from JSOM
719530 and 713903
AMAZON ORD #11362796374670608
HOL1834-14 Reimbursement
HOL2039-14
Invoice 690870
ORD # 11397527756804208
Order Number 00262107187275416
Purchase Order HOL2023-14

Figure 81 – Fund Transaction Reference Report Example

## Other Analytics Enhancements

- In the Funds Expenditure subject area, the **Payment Voucher Amount** column was added under the Invoice Line dimension.
- In the Funds Expenditure subject area, the Material Type folder was changed to **PO Line Type** to match the Alma user interface. Similarly, under this folder, the Metadata Type field was changed to **Acquisition Material Type**.
- In the Fulfillment subject area, the **Loan Circulation Desk** and **Return Circulation Desk** folders are now sorted alphabetically.
- In the Users subject area, under the **Block** dimension, the Block Description column was renamed **Block ID** and a new column with the correct block description was added.

# Alma APIs

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

## Alma RESTful APIs

For the December release, the following enhancements were added:

- Four fields were added to the Order API:
  - `acquisition_method`
  - `cancellation_restriction`
  - `cancellation_restriction_note`
  - `vendor_reference_number_type`

In addition, the MMS ID parameter can now be entered in the API to create a PO line in Alma from the bibliographic record with this MMS ID. If a bibliographic record with the MMS ID is not found, Alma creates the PO line using the other parameters from the API, such as title, creator, and ISSN.

For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>

- A Search Order API was added, enabling the search for a PO line via API (`GET /acq/po-lines`). For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>
- GET Request APIs now accurately report the exact type of request that is being retrieved. For this purpose, the **request\_sub\_type** has been added to the XSD and implementations of these APIs. It is also now possible to filter the returned list by the required request type.
- The following fields are now returned in the GET Request APIs (and in the response from POST):
  - Place in queue
  - ID of the requester (primary ID)
  - Expiry date of the process
- The Cash and User Loans Web services were moved to RESTful APIs. For information on these APIs, see <https://developers.exlibrisgroup.com/alma/apis/users>

# Collaborative Networks and Multicampus Institutions

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

## Defining Display Logic Rules at the Campus Level

### Description

For multicampus environments (**multi\_campus\_inventory\_management** = **true** in the CustomerParameters mapping table), Alma allows you to define display logic rules at the campus level for the following electronic services: full text, selected full text, database services, and general electronic services. Alma applies the display logic rules in multicampus environments as follows:

- The campus for which the services are calculated is based on the IP address from which the patron triggers the Alma Services page or the campus affiliation of the logged-in patron. If Alma determines that a patron is logged on at a different campus, the calculated electronic services are based on the display logic rules defined for both campuses.
- Display logic rules that are enabled at the campus level override all electronic display logic rules enabled at the institution level.
- For non-electronic services, Alma also applies the display logic rules that are enabled at the institution level.
- If no campus-level display logic rules are enabled, Alma applies all display logic rules that are enabled at the institution level.

---

**Note:** It is a known issue that display logic rules are not supported at the campus level when the campus parameter is included in an OpenURL. This will be resolved in a later release.

---

### Technical Instructions

The following roles are required to update display logic rules:

- General System Administrator
- Fulfillment Administrator

**To define display logic rules at the campus level:**

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Display Logic Rules** under **Discovery Interface Display Logic**.

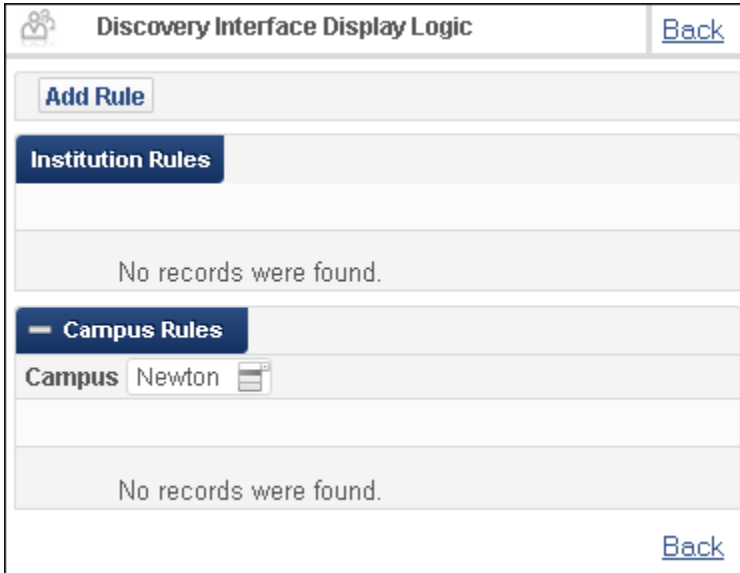


Figure 82 – Discovery Interface Display Logic Page

- 2 Click **Add Rule**.

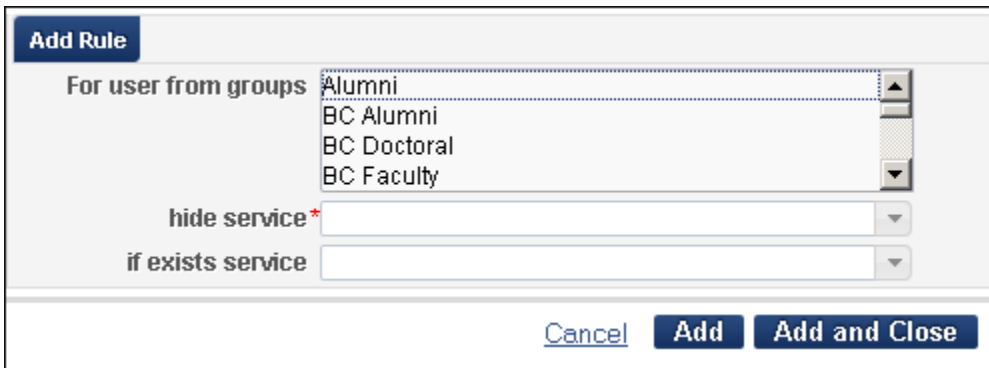


Figure 83 – Add Rule Dialog Box

- 3 Select one of the following electronic services from the **hide service** drop-down list: **DB Service**, **Full Text**, **General Electronic Service**, or **Selected Full Text**.

**Add Rule**

For user from groups: Alumni, BC Alumni, BC Doctoral, BC Faculty

hide service\* Full Text

with

with value

if exists service

when in campus

Cancel Add Add and Close

Figure 84 – Electronic Service Selected

- 4 Select a campus from the **when in campus** drop-down list
- 5 Fill out the remaining fields and click **Add and Close**.

The Add Rule dialog box closes, and the new rule is added under the Campus Rules section on the Discovery Interface Display Logic page.

Discovery Interface Display Logic [Back](#)

**Add Rule**

**Institution Rules**

No records were found.

**– Campus Rules**

Campus Newton

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

Active	Move Up	Move Down	Rule Description	
1	✓		For user groups Visitor: Hide service Full Text with Interface = Berkeley Electronic Press if exists service Booking Request when in campus Newton	<a href="#">Remove</a>

[Back](#)

Figure 85 – Rule Added to Campus Rules Section

To view rules for another campus, select the campus from the **Campus** drop-down filter.

## Enhancements to Electronic Resource Activation Process in a Collaborative Network

Processing of IZ-activated electronic resources has been enhanced to ensure that duplicate bibliographic records in the NZ are prevented and that the proper NZ **held by** information is preserved. Alma uses an internal matching algorithm to check for duplication of NZ and CZ records by using originating system IDs (CZ versus NZ system IDs) when an IZ member activates an electronic resource and the bibliographic record is uploaded to the NZ.

## Central Network Zone Managed Resource Sharing Configurations

### Description

Specified parameters can now be centrally configured in the Network Zone and automatically distributed to the network member institutions. This allows consortia to centrally configure the resource sharing network and maintain its attributes in one set of configuration attributes at the Network Zone, rather than manage the network's attributes multiple times in multiple institutions. The Distribute Central Resource Sharing Configuration job distributes these configuration elements to all network member institutions.

The job is monitored in the Network Zone. Once distributed to the institutions, these configuration components display on the respective pages of each institution with a Scope value of **Network**.

The following resource sharing configuration elements may be centrally configured in the Network Zone and distributed to the network member institutions:

- Locate Profiles
- Workflow Profiles
- Sending Borrowing Request Rules

## Technical Instructions

The following roles can create locate profiles, workflow profiles, and sending borrowing request rules in the network zone, if authorized to log into the network zone:

- General System Administrator
- Fulfillment Administrator

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

- 1 When logged into the Network Zone, configure a locate profile, workflow profile, or sending borrowing request rule for an institution in a collaborative network environment.
- 2 On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Scheduled** tab to view scheduled jobs. Select **Fulfillment** in the filter on the top left side of the page, and locate the **Distribute central resource sharing configuration** job.

Monitor Jobs								De-Activate Selected	Activate Selected	
Scheduled								SP Scheduled	Running	History
Filter: Fulfillment								1 - 15 of 15 Schedules		Tools
	Active	Name	Job Category	Creator	Schedule	Next Run				
1	<input checked="" type="checkbox"/>	Requests - Handle Expiration Step	Fulfillment	exl_support	Every day at 01:00 PM	11/06/2014 01:00:00 PM IST		Actions		
2	<input checked="" type="checkbox"/>	Loans - Due Date Correction after Calendar Change	Fulfillment	-	-	-		Actions		
3	<input checked="" type="checkbox"/>	Notifications - Send Courtesy Notices and Handle Loan Renewals	Fulfillment	exl_support	Every day at 01:00 PM	11/06/2014 01:00:00 PM IST		Actions		
4	<input checked="" type="checkbox"/>	Fulfillment - Handle Historical Archiving	Fulfillment	exl_support	Every day at 08:00 PM	11/05/2014 08:00:00 PM IST		Actions		
5	<input checked="" type="checkbox"/>	Notifications - Send Periodic Fulfillment Activity Report	Fulfillment	exl_support	Every day at 05:00 PM	11/06/2014 05:00:00 PM IST		Actions		
6	<input checked="" type="checkbox"/>	Notifications - Send Due Date Reminders	Fulfillment	exl_support	Every day at 04:00 PM	11/06/2014 04:00:00 PM IST		Actions		
7	<input checked="" type="checkbox"/>	Requests - Restore Temporarily Shelved Items	Fulfillment	saas_admin	-	-		Actions		
8	<input checked="" type="checkbox"/>	Requests - Recalculate after Inventory Update	Fulfillment	exl_support	Every day at 10:00 PM	11/05/2014 10:00:00 PM IST		Actions		
9	<input checked="" type="checkbox"/>	Loans - Change to Lost	Fulfillment	-	Every day at 05:00 AM	11/06/2014 05:00:00 AM IST		Actions		
10	<input checked="" type="checkbox"/>	Activate/Deactivate Courses	Fulfillment	-	Every Saturday at 02:00 PM	11/08/2014 02:00:00 PM IST		Actions		
11	<input checked="" type="checkbox"/>	Activate/Deactivate Courses	Fulfillment	-	Every day at 02:00 PM	11/06/2014 02:00:00 PM IST		Actions		
12	<input checked="" type="checkbox"/>	Users - Remove Demerits Blocks	Fulfillment	-	Every day at 02:00 PM	11/06/2014 02:00:00 PM IST		Actions		
13	<input checked="" type="checkbox"/>	Distribute central resource sharing configuration	Fulfillment	-	Every day at 01:00 PM	11/06/2014 01:00:00 PM IST		Actions		
14	<input checked="" type="checkbox"/>	Expired lending request	Fulfillment	-	Every day at 12:00 PM	11/06/2014 12:00:00 PM IST		Actions		
15	<input checked="" type="checkbox"/>	Distribute network fulfillment changes to members	Fulfillment	-	Every day at 11:00 AM	11/06/2014 11:00:00 AM IST		Actions		

Figure 86 – Monitor Jobs Page – Distribute Central Resource Sharing Configuration Job

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

Alerts

Of the 74 records processed, 46 records failed. For more information view the report details (or contact Support using the process ID).

Locate Profile

1	01BC_INST	BC College	0	1	Actions
2	WST	Western State	1	0	Actions
3	EST	Eastern State	1	0	Actions

Workflow Profile

1	01BC_INST	BC College	0	31	Actions
2	WST	Western State	5	0	Actions
3	EST	Eastern State	5	0	Actions

Partners

Rota Templates

Rota Assignment Rules

Sending Borrowing Request Rules

1	01BC_INST	BC College	0	0	Actions
2	WST	Western State	0	0	Actions
3	EST	Eastern State	0	0	Actions

Back

Figure 87 – Job Report Page – Completed Job

In addition to the report's existing data, you can expand the following sections to view distribution statistics from the network zone to all of the network's member institutions:

- Locate Profile
- Workflow Profile
- Sending Borrowing Request Rules

For each institution in each section, you can select the following to view information on the records processed by the job:

- Actions > View Failed Records
- Actions > View Succeeded Records

After running the **Distribute central resource sharing configuration** job, network settings that are distributed to the member institutions can be viewed in the relevant configuration pages **at the member institutions**. The distributed elements are indicated by a check mark in the **Shared** column on the following configuration pages:

- Locate Profiles List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Locate Profiles**)

Locate Profiles List

Add Locate Profile

	Shared	Name	Description
1		alma	z39
2	✓	alma2	alma2
3	✓	z39	z39

Figure 88 – Locate Profiles List Page

- Workflow Profiles page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**)

Workflow Profile	Type	Steps	Shared
1 duplicate2	Borrowing	Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Report lost item to partner, Request accepted	Shared
2 new	Borrowing	Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff	✓

Figure 89 – Workflow Profiles Page

Additionally, the Sending Borrowing Request Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Sending Borrowing Request Rules**) displays rules associated with the network in the **Network Rules List** section at the bottom of the page.

You are configuring: Eastern State

**Institution Rules List**

Filter: All

Add Rule

Enabled	Move Up	Move Down	Rule Name	Description
1	✓		local	-

**Network Rules List**

Filter: All

Rule Name	Description	Update
1 rule2	-	Implement

Default Rule: Default sending borrowing request rule [Edit](#)

Figure 90 – Sending Borrowing Request Rules List Page — Network Rules List Section

## Other Collaborative Network Enhancements

- The following new counters were added to the MD import reports when **Use NZ** is selected:
  - Records not deleted since profile not allowing
  - Total records marked for deletion
  - Total records deleted from NZ
  - Total records deleted from IZ
  - Records in NZ with inventory that cannot be deleted
  - Records in IZ with inventory that cannot be deleted

## 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.
- Currently, Legal Deposit claim notifications are sent for one-time-order items only. Claim notifications for continuous-order items will be available in a future Alma release.
- The LCCN match method does not work for the new Overlap Analysis feature.
- Z39 reports indicate that all searches have been executed from an IP address of 127.0.0.1.