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Table of Contents

1	About the Alma Release Notes	6
2	Alma February 2014 Release Highlights	7
	Acquisitions	7
	Resource Management	7
	Fulfillment	8
	Resource Sharing	9
	Analytics	9
	Alma Interface Updates	9
3	Data Services	10
	New Electronic Packages Added to the Alma CKB	10
4	Alma Show Me How and Videos	15
	Alma Show Me How – February	15
	Alma Videos – February	15
5	Documentation Highlights	17
6	Particular Issues to Note	18
7	Acquisitions	19
	Test FTP Connection for Vendors	19
	Create a PO Line Set from an Imported EOD	20
	Mapping an ISBN Value from EOD to PO Line	22
	Add Multiple Electronic Resources to a PO Line	24
	Improved Handling of Inventory Updates Related to Holdings Call Numbers	29
	Quick Add Now Available for Adding Items and Funds to PO Lines	30
	Other Acquisitions Enhancements	31
8	Resource Management	32
	Electronic Collection Editor and Electronic Service Editor Improvements for Managing Electronic Resources	32
	Improved OCLC Number Matching with Alma Resolver	34

	New Export Utility for Extracting Electronic Portfolio URLs for Synchronizing with a Proxy Server	35
	Physical Item Sort Routines	38
	Preferred Term Correction Enhancements	41
	Integrate Import Process with Local Package – Including Support for Multiple URLs	46
	Improve Import Error Handling	48
	Convert Logical Sets to Itemized Sets	52
	Other Resource Management Enhancements	54
9	Fulfillment	55
	Home/Office Personal Delivery	55
	Filtering Holdings for 773 Links	58
	On-the-Fly Calculation of Terms of Use	59
	Alma Resolver – Sorting Enhancement	59
	Support Paging for DLF Loan List APIs	60
	Other Fulfillment Enhancements	61
10	Resource Sharing	62
	Shipping Note Element for Lending Requests	62
	Print Slip Report for Lending Requests	64
	Configuring Mandatory Fields for Resource Sharing Request Forms	66
	Automatically Activate Locate Profile to Refine an Assigned Rota	68
	Configuring Rules for Automatic Sending of Borrowing Requests	69
	Adding or Modifying Due Date for a Resource Sharing Borrowing Request Sent via NCIP	71
	Other Resource Sharing Enhancements	72
11	Analytics	74
	Addition of Due Date Fields to the Resource Sharing Borrowing and Lending Requests Subject Areas	74
12	Integrations with External Systems	79
	Enhancement to Libraries Australia Upload	79
	Other Integrations with External Systems Enhancements	80
13	Collaborative Networks and Multi-Campus Institutions	81

	Library/Campus Proxy Options Added	81
	Central Publishing to Primo	83
	PDA Load Profiles - Link Bibliographic Records to the Network Zone	86
14	Alma Interface Updates	88
	Work Order Terminology	88
	Creator Info Icon Now Displayed in the Created By Column	88
	Maintenance Message	89
15	Alma APIs	91
	Alma RESTful APIs	91
16	Known Issues	92

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 February 2014 Release Highlights](#)
- [Data Services](#) updates
- [Alma Show Me How and Video](#) lists
- [Documentation Highlights](#)
- [Particular Issues to Note](#)
- Feature/enhancement descriptions and technical instructions for the following Alma components and functional areas
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [Resource Sharing](#)
 - [Analytics](#)
 - [Integrations with External Systems](#)
 - [Collaborative Networks and Multi-Campus Institutions](#)
 - [Alma Interface Updates](#)
 - [Alma APIs](#)
- [Known Issues](#)

Alma February 2014 Release Highlights

Acquisitions

- Quick Add for Items and Funds to PO Lines
This great new option provides a Quick Add feature when adding items and funds on the PO line Summary tab. Quick Add has a distinctive look that differentiates it from the rest of the page. Information in these fields can be added more efficiently, as only the Quick Add area refreshes instead of the whole page. In addition, pressing the **Enter** key has the same functionality as clicking **Add**.
- Create a PO Line Set from an Imported EOD
This enhancement allows you to create a set of PO lines upon import. The set can then be used to perform global updates such as changing status, updating the PO line information, and so forth.
- Mapping an ISBN Value from EOD to PO Line
This new option will eliminate cases in which the order is registered at the vendor with one identifier and in Alma with a different identifier.
- Improved Handling of Inventory Updates Related to Holdings Call Numbers
This enhancement improves the handling of inventory updates related to shelf-ready vendor update orders and call numbers.

Resource Management

- Physical Item Sort Routines
This great new feature allows for more flexibility in determining the sort order display of physical items on the Manage Items pages, the staff search physical items list, and with Get It. In addition to out-of-the-box default sort routines, Alma now offers new configuration options for creating your own custom sort routines. The sort routines display in a drop-down list that allows you to dynamically switch from one sorted view to another and additionally sort in ascending or descending order.
- Preferred Term Correction Enhancements
The Authorities – Preferred Term Correction job, a system-controlled and scheduled job, can now be enabled. If this job is enabled, preferred term correction is performed, as required, on all bibliographic records that are linked to authority records via the Authorities – Link Bibliographic Headings job.

- Electronic Collection Editor and Electronic Service Editor Improvements for Managing Electronic Resources

This new feature provides additional information and efficiencies when working with the Alma Electronic Collection and the Electronic Service Editors. Specifically, the Title column in the Portfolios tab of the Electronic Service Editor has been enabled to sort in ascending and descending order. In addition, the Electronic Collection Editor has a new column that displays the number of active portfolios.

- Improved OCLC Number Matching with Alma Resolver

There is now improved OCLC number matching with the Alma Resolver. Previously, the OpenURL statement would not find some OCLC number matches when the 035 field contained \$a and \$z that the system concatenated into a single value. Now, each subfield is indexed separately for comprehensive matching on the OCLC numbers.

Fulfillment

- Home/Office Personal Delivery

This great new enhancement allows for personal delivery of requested physical items to a user's office or home. To support this functionality, a new personal delivery check box has been added to the circulation desk configuration. In addition, a new request policy must be attached to the TOU to allow personal delivery of items. You can also configure a request policy to include delivery fees.

- On-the-Fly Calculation of Terms of Use

With this enhancement, any change in a policy, terms of use, fulfillment rule, patron information, or item information has an immediate effect on a loan or a request terms of use. (Previously, each activity on a loaned item referred to the TOU policy settings at the time of the item's original loan or request.)

- Alma Resolver – Sorting Enhancement

This enhancement improves the sorting relevance of online resources offered by the Alma Service Page for OpenURL's coming from Primo Central and EBSCO API. A new option has been added to place the highest priority on services that match the source of the OpenURL. For example, if a user searching Primo Central discovers an article from Gale and the Alma Resolver can offer services from Gale and EBSCO, Alma will place the service from Gale at the top of the services list.

Resource Sharing

- Shipping Note Element for Lending Requests

It is now possible to include a shipping note in resource sharing lending requests. The shipping note is used for the NCIP communication protocol for resource sharing items and contains information about the resource itself, the requester, and the locations from which it is requested and is to be picked up.

- Configuring Mandatory Fields for Resource Sharing Request Forms

This enhancement allows you to designate specific fields as mandatory when configuring resource sharing requests. The configured fields also appear as mandatory in Primo Reading List citations. Furthermore, it is possible to group several fields together so that one of the selected fields is designated as mandatory when configuring resource sharing requests.

- Configuring Rules for Automatic Sending of Borrowing Requests

The purpose of this enhancement is to enable configuring a rule for automatically sending borrowing requests. A default sending borrowing request rule indicates whether the request is to be sent when none of the borrowing request rules is met.

Analytics

- Addition of Due Date Dimension to the Resource Sharing Borrowing and Lending Requests Subject Areas

Due dates have been added to the Resource Sharing Borrowing and Lending Requests subject areas.

Alma Interface Updates

- Work Order Terminology

Labels associated with work orders have been updated so that staff users can better differentiate between work orders and requests.

- Creator Info Icon Now Displayed in the Created By Column

The Creator Info icon is displayed in the Created By column on various pages of Alma, such as on the Notes tab of the User Details and PO lines pages.

Data Services

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

New Electronic Packages Added to the Alma CKB

The following packages were added to the Alma CZ during the period 29-December-2013 through 26-February-2014:

- Galegroup Cengage Professional Collection
- SpringerLink Books Architecture And Design 2005
- SpringerLink Books Architecture And Design 2006
- SpringerLink Books Architecture And Design 2007
- SpringerLink Books Architecture And Design 2008
- SpringerLink Books Behavioral Science 2005
- SpringerLink Books Behavioral Science 2006
- SpringerLink Books Behavioral Science 2007
- SpringerLink Books Behavioral Science 2008
- SpringerLink Books Behavioral Science 2009
- SpringerLink Books Behavioral Science 2010
- SpringerLink Books Behavioral Science 2011
- SpringerLink Books Behavioral Science 2012
- SpringerLink Books Behavioral Science 2013
- SpringerLink Books Biomedical and Life Sciences 2005
- SpringerLink Books Biomedical and Life Sciences 2006
- SpringerLink Books Biomedical and Life Sciences 2007
- SpringerLink Books Biomedical and Life Sciences 2008
- SpringerLink Books Biomedical and Life Sciences 2009
- SpringerLink Books Biomedical and Life Sciences 2010
- SpringerLink Books Biomedical and Life Sciences 2011

- SpringerLink Books Biomedical and Life Sciences 2012
- SpringerLink Books Biomedical and Life Sciences 2013
- SpringerLink Books Business And Economics 2005
- SpringerLink Books Business And Economics 2006
- SpringerLink Books Business And Economics 2007
- SpringerLink Books Business And Economics 2008
- SpringerLink Books Business And Economics 2009
- SpringerLink Books Business And Economics 2010
- SpringerLink Books Business And Economics 2011
- SpringerLink Books Business And Economics 2012
- SpringerLink Books Business And Economics 2013
- SpringerLink Books Chemistry And Material Science 2005
- SpringerLink Books Chemistry And Material Science 2006
- SpringerLink Books Chemistry And Material Science 2007
- SpringerLink Books Chemistry And Material Science 2008
- SpringerLink Books Chemistry And Material Science 2009
- SpringerLink Books Chemistry And Material Science 2010
- SpringerLink Books Chemistry And Material Science 2011
- SpringerLink Books Chemistry And Material Science 2012
- SpringerLink Books Chemistry And Material Science 2013
- SpringerLink Books Computer Science without Lecture Notes 2005
- SpringerLink Books Computer Science without Lecture Notes 2006
- SpringerLink Books Computer Science without Lecture Notes 2007
- SpringerLink Books Computer Science without Lecture Notes 2008
- SpringerLink Books Computer Science without Lecture Notes 2009
- SpringerLink Books Computer Science without Lecture Notes 2010
- SpringerLink Books Computer Science without Lecture Notes 2011
- SpringerLink Books Computer Science without Lecture Notes 2012
- SpringerLink Books Computer Science without Lecture Notes 2013

- SpringerLink Books Earth And Environmental Science 2005
- SpringerLink Books Earth And Environmental Science 2006
- SpringerLink Books Earth And Environmental Science 2007
- SpringerLink Books Earth And Environmental Science 2008
- SpringerLink Books Earth And Environmental Science 2009
- SpringerLink Books Earth And Environmental Science 2010
- SpringerLink Books Earth And Environmental Science 2011
- SpringerLink Books Earth And Environmental Science 2012
- SpringerLink Books Earth And Environmental Science 2013
- SpringerLink Books Energy 2013
- SpringerLink Books Engineering 2005
- SpringerLink Books Engineering 2006
- SpringerLink Books Engineering 2007
- SpringerLink Books Engineering 2008
- SpringerLink Books Engineering 2009
- SpringerLink Books Engineering 2010
- SpringerLink Books Engineering 2011
- SpringerLink Books Engineering 2012
- SpringerLink Books Engineering 2013
- SpringerLink Books Humanities and Social Sciences (German) 2005
- SpringerLink Books Humanities and Social Sciences (German) 2006
- SpringerLink Books Humanities and Social Sciences (German) 2007
- SpringerLink Books Humanities and Social Sciences (German) 2008
- SpringerLink Books Humanities and Social Sciences (German) 2009
- SpringerLink Books Humanities and Social Sciences (German) 2010
- SpringerLink Books Humanities and Social Sciences (German) 2011
- SpringerLink Books Humanities and Social Sciences (German) 2012
- SpringerLink Books Humanities and Social Sciences (German) 2013
- SpringerLink Books Humanities, Social Sciences And Law 2005

- SpringerLink Books Humanities, Social Sciences And Law 2006
- SpringerLink Books Humanities, Social Sciences And Law 2007
- SpringerLink Books Humanities, Social Sciences And Law 2008
- SpringerLink Books Humanities, Social Sciences And Law 2009
- SpringerLink Books Humanities, Social Sciences And Law 2010
- SpringerLink Books Humanities, Social Sciences And Law 2011
- SpringerLink Books Humanities, Social Sciences And Law 2012
- SpringerLink Books Humanities, Social Sciences And Law 2013
- SpringerLink Books Business and Economics (German) 2005
- SpringerLink Books Business and Economics (German) 2006
- SpringerLink Books Business and Economics (German) 2007
- SpringerLink Books Business and Economics (German) 2008
- SpringerLink Books Business and Economics (German) 2009
- SpringerLink Books Business and Economics (German) 2010
- SpringerLink Books Business and Economics (German) 2011
- SpringerLink Books Business and Economics (German) 2012
- SpringerLink Books Business and Economics (German) 2013
- SpringerLink Books Computer Science And Engineering (German) 2005
- SpringerLink Books Computer Science And Engineering (German) 2006
- SpringerLink Books Computer Science And Engineering (German) 2007
- SpringerLink Books Computer Science And Engineering (German) 2008
- SpringerLink Books Computer Science And Engineering (German) 2009
- SpringerLink Books Computer Science And Engineering (German) 2010
- SpringerLink Books Computer Science And Engineering (German) 2011
- SpringerLink Books Computer Science And Engineering (German) 2012
- SpringerLink Books Computer Science And Engineering (German) 2013
- SpringerLink Books Medicine 2005
- SpringerLink Books Medicine 2006
- SpringerLink Books Medicine 2007

- SpringerLink Books Medicine 2008
- SpringerLink Books Medicine 2009
- SpringerLink Books Medicine 2010
- SpringerLink Books Medicine 2011
- SpringerLink Books Medicine 2012
- SpringerLink Books Medicine 2013
- SpringerLink Books Medicine (Dutch) 2005
- SpringerLink Books Medicine (Dutch) 2006
- SpringerLink Books Medicine (Dutch) 2007
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- SpringerLink Books Medicine (Dutch) 2010
- SpringerLink Books Medicine (Dutch) 2011
- SpringerLink Books Medicine (Dutch) 2012
- SpringerLink Books Medicine (Dutch) 2013
- SpringerLink Books Medicine (German) 2005
- SpringerLink Books Medicine (German) 2006
- SpringerLink Books Medicine (German) 2007
- SpringerLink Books Medicine (German) 2008
- SpringerLink Books Medicine (German) 2009
- SpringerLink Books Medicine (German) 2010
- SpringerLink Books Medicine (German) 2011
- SpringerLink Books Medicine (German) 2012
- SpringerLink Books Medicine (German) 2013
- 青空文庫

Alma Show Me How and Videos

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

Alma Show Me How – February

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 February release, the following Show Me How scenarios are available:
 - Configure a Sort Routine for Physical Items
 - Create a Slip Report for Lending Requests
 - Lender "Checked In" Message on Item Return

Alma Videos – February

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

- Import Electronic Portfolios into a Local Package
- Import Multiple Electronic Portfolios from a Record with Multiple URLs
- Item Sort Routines
- Home and Office Delivery

- **Managed by Department** changed to **In Process**
- Print Slip Report for Lending Requests
- ISO ILL: Lender Checked-in Message

Documentation Highlights

In addition to handling fixes to the documentation based on feedback we received, we have added documentation, or improved upon the existing documentation, in the following key areas since the December 2013 release:

- Working with Alma Sandbox Environments – This section provides information on Alma's Standard and Premium sandboxes, the differences between the sandbox environments and the Alma production environment, and Alma-Primo configuration post-"Go Live." This new section is accessible from the online help's Table of Contents.
- Publishing Electronic Holdings to Google Scholar – This section has been revised and enhanced, following its initial inclusion in the documentation for the December 2013 release (under Integrations with External Systems > Resource Management).
- Creating a Work Order Request – This new section provides specific information on creating work order requests (under Fulfillment > Circulation Desk Operations > Creating a Request from the Institution)
- Configuring Fulfillment Units, Policies, and Terms of Use – This section now provides a sample workflow for configuring all these fulfillment elements (under Fulfillment > Configuring Fulfillment).
- Letter Configuration – This section has been further revised and enhanced (under Administration > Configuring General Alma Functions > Configuring General Activities > Configuring Alma Letters).
- Normalization Rules – Additional normalization rule examples have been added (under Resource Management > Metadata Management > Working with Normalization Rules > Normalization Rules – Syntax and Examples).

The above will be available with the update of the online help on the 2nd of February.

Particular Issues to Note

The following issue should be noted for the February 2014 release:

- We have modified the default XSL for the **Ful Resource Request Slip** letter.

If you have customized the XSL for this letter, it is now necessary to replace the following lines in the XSL:

```
<b>@@requested_for@@ :  
  <xsl:value-of select="notification_data/user_for_printing/name"/></b>  
  <xsl:attribute name="style">  
    <xsl:call-template name="bodyStyleCss" /> <!-- style.xml -->  
  </xsl:attribute>
```

With these lines:

```
<h1>  
  <b>@@requested_for@@ :  
    <xsl:value-of select="notification_data/user_for_printing/name"/>  
  </b>  
</h1>
```

Acquisitions

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

Test FTP Connection for Vendors

Description

The purpose of this enhancement is to enable verifying that the S/FTP parameters entered for a vendor are valid before running a process.

Technical Instructions

The Vendor Manager role can verify S/FTP parameters before running a process.

To verify S/FTP parameters for a vendor:

- 1 On the Vendor Details page (**Acquisitions > Acquisitions Infrastructure > Vendors**, select **Actions > Edit** for a vendor), click the **EDI Information** tab.

Vendor Details

Vendor name: Swets EDI | Vendor code: SWETS

Summary | Contact Information | Contact People | **EDI Information** | Invoices | PO Lines | Communications | Attachments | Notes

Vendor EDI Attributes

EDI code: SWETSEDI | EDI type: 091 - ID assigned by sup | EDI naming convention: Standard | EDI vendor format: Harrowswitz

Invoices: | POS: | Additional order number: | Include fund code:

Scheduling

Status: Active | Inactive | Schedule: Not scheduled | Run Now

Upload EDI:

S/FTP connection

Description: FTP Information for EDI of current Vendor

Max. Number of Files: 1 | Max. file size: 1

Server: ii-perturn01 | Username: urm

Port: 21 | Password: *****

Input directory: SISSubmission/InvoiceEdi/SWETS | Output directory: SISSubmission/orderEdi

Max. file size: GB | Allow Navigation:

Flp Server Secured: | FTP mode: ASCII | FTP Passive Mode:

Send command: Append

Per Organization Unit EDI

1 - 1 of 1 Records | Tools

Organisation Unit	EDI code	EDI type	
Main Campus	1147404	092 - ID assigned by customer	Delete

Organisation Unit: | EDI code: | EDI type: 014 - EAN-13

EAN per Account code

1 - 3 of 3 Records | Tools

Account code	EAN Code	
12345678	INJ040A	Delete
SwetAcc	asdad	Delete
345689	40020841940	Delete

Account code: | EAN Code: | Add EAN

Figure 1 – Vendor Details Page – EDI Information Tab

- 2 In the **S/FTP Connection** section, enter information in the relevant fields.
- 3 Click **Test FTP**. Any error messages indicating invalid data are displayed at the top of the page.

Create a PO Line Set from an Imported EOD

Description

The purpose of this enhancement is to create a set of PO lines upon importing an EOD. This enables performing global updates on the imported PO lines, such as changing status, updating PO line information, and so forth.

PO lines can be changed globally via the relevant PO line process (see **Configuring Processes** in the *Alma Resource Management Guide* or online help).

Technical Instructions

The following roles can create a set of PO lines from a group of imported lines:

- Acquisitions Administrator
- General System Administrator

To create a PO line set from an imported EOD:

- 1 On the Run Import page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**), filter the list of results by **New Order** profiles. The New Order import profiles display.

Active	Profile name	Profile description	Profile Type	Actions
✓	Acq_Automation	-	New Order	Actions
✓	Copy of Acq_Automation	-	New Order	Actions
✓	Copy of Acq_Automation	-	New Order	Actions
✓	Copy of Acq_Automation	-	New Order	Actions
✓	Copy of Acq_Automation	-	New Order	Actions
✓	Copy of New Order Electronic	-	New Order	Actions
✓	Danny	-	New Order	Actions
✓	Danny - Electronic	-	New Order	Actions
✓	Embedded Order Data (Test)	Testing an Embedded Order Data Profile	New Order	Actions
✓	etay New Order for file test5	-	New Order	Actions

Figure 2 – Run Import Page — New Order Import Profiles

- 2 Select **Actions > Job History** for an entry. The Job History page opens.

Job History								Back
Profile Details				Profile Description -				
Profile Name Acq_Automation				Profile Type New Order				Status Active
Job History List								
Filter: All		Find:		in: All		Go		
Refresh		1 2 3		1 - 10 of 971 Records		Tools		
Job ID	Status	User	Time Started	Time Ended	Files Processed	Files Rejected	Actions	
530941500000121	Completed Successfully	admin1	2013-12-17 11:37:05	2013-12-17 11:37:53	1	0	Actions	
526576140000121	Completed with Errors	exl_impl	2013-10-28 15:14:16	2013-10-28 15:14:20	0	0	Actions	
526567550000121	Completed with Errors	exl_impl	2013-10-28 13:52:18	2013-10-28 13:52:22	0	0	Actions	
526562690000121	Completed with Errors	exl_impl	2013-10-28 13:33:02	2013-10-28 13:33:06	0	0	Actions	
526555800000121	Completed with Errors	exl_impl	2013-10-28 13:14:05	2013-10-28 13:14:09	0	0	Actions	
526553590000121	Completed with Errors	exl_impl	2013-10-28 13:11:47	2013-10-28 13:11:53	0	0	Actions	
526547840000121	Completed with Errors	exl_impl	2013-10-28 13:04:29	2013-10-28 13:04:34	0	0	Actions	
526525340000121	Completed with Errors	exl_impl	2013-10-28 12:38:59	2013-10-28 12:39:07	0	0	Actions	
526520720000121	Completed with Errors	exl_impl	2013-10-28 11:50:43	2013-10-28 11:50:48	0	0	Actions	
526514110000121	Completed with Errors	exl_impl	2013-10-28 09:36:48	2013-10-28 09:36:52	0	0	Actions	

Figure 3 – Job History Page

- 3 Select **Actions > Imported PO Lines** for a job. The Search for PO Line page opens and displays the PO lines associated with the job.

Advanced Search	
Find	531242710000121 in Import job ID
Workflow	Equals
Material Supplier	Equals
Material Supplier Account	Contains Keywords
Access Provider	Equals
Acquisition Method	Equals
Fund Code	Equals
Fund Name	Contains Keywords
License Code	Equals
Rush	Equals
Cancellation restriction	Equals
<input type="button" value="Go"/>	
<p>1 URM-2s6829-adsNew-Order-today-1 1669-1675 / Elizabeth Thompson ; serie., Cumbria Family History Society, 2001., a123das45678AasdBCD, ISBN Order/ Line status: - / In Review Assigned to: - Type: Print Book - One Time Standard number: a123das45678AasdBCD Order/Line: - / POL-64323 Copies: Main Library - General (3) Total price: 0.00 Funds: - Vendor/Account: ABC Political Science / Default Account ABCPOL Vendor reference ID: - Expected delivery: - Receiving note: - Mandatory information is missing or erroneous, Reporting code is missing View Go to task list Cancel</p>	

Figure 4 – Search for PO Lines Page

- 4 Click **Save**. The Set Details page opens.

Set Details

Set name - Set type Logical

General Information

Set name*

Description

Note

Set content type PO line

Status Active Inactive

Private Yes No

Status date 12/01/2014 03:37:07 PM IST

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Figure 5 – Set Details Page

- 5 Enter a name for the set in the **Set name** field, and modify any other parameters as necessary.
- 6 Click **Save** to save the set.

Mapping an ISBN Value from EOD to PO Line

Description

The purpose of this enhancement is to eliminate cases in which an EOD order is registered at a vendor with one identifier and in Alma with a different identifier.

When importing EOD files, PO lines are now created automatically with an identifier that is retrieved from the bibliographic record. This enhancement enables creating an order with a specific identifier from a specific MARC field as communicated by the vendor in the EOD file.

Technical Instructions

The following roles can map an ISBN value from an EOD to a PO line:

- Acquisitions Administrator
- General System Administrator

To map an ISBN value from an EOD to a PO line:

- 1 On the Run Import page (**Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**), filter the list of results by **New Order** profiles. The New Order import profiles display.

Active	Profile name	Profile description	Profile Type	
<input checked="" type="checkbox"/>	Acq_Automation	-	New Order	Actions
<input checked="" type="checkbox"/>	Copy of Acq_Automation	-	New Order	Actions
<input checked="" type="checkbox"/>	Copy of Acq_Automation	-	New Order	Actions
<input checked="" type="checkbox"/>	Copy of Acq_Automation	-	New Order	Actions
<input checked="" type="checkbox"/>	Copy of Acq_Automation	-	New Order	Actions
<input checked="" type="checkbox"/>	Copy of New Order Electronic	-	New Order	Actions
<input checked="" type="checkbox"/>	Danny	-	New Order	Actions
<input checked="" type="checkbox"/>	Danny - Electronic	-	New Order	Actions
<input checked="" type="checkbox"/>	Embedded Order Data (Test)	Testing an Embedded Order Data Profile	New Order	Actions
<input checked="" type="checkbox"/>	etay New Order for file test5	-	New Order	Actions

Figure 6 – Run Import Page – New Order Import Profiles

- 2 Select **Actions > Edit** for a profile, and click the **PO Line Information** tab. The Import Profile Details page opens.

Profile Type		Profile name	
New Order		Acq_Automation	
Profile Details	Normalization & Validation	Match Profile	Set Management Tags
Inventory Information		PO Line Information	
EOD General Parameters			
Physical PO Line type*	Print Book - One Time	Vendor	Blackwell
Vendor account	Blackwell	PO Line currency	US Dollar
Decimal point location	0	Acquisition Method	Purchase
EOD mapping			
PO Line field	949	subfield	b
Vendor Reference Number field		subfield	
List price field	949	subfield	s
Vendor title number field		subfield	
Volume Part Number field		subfield	
Po number field	949	subfield	c
PO Line Owner field		subfield	
Default PO line owner	Main Library	Fund distribution field	
Map Owner	<input checked="" type="checkbox"/>	subfield	
Fund distribution field		Percent subfield	
Default fund	QA Fund Auto3	Reporting code	
Map funds	<input type="checkbox"/>	Interested users	
Reporting code		subfield	
Vendor invoice number field		subfield	
Note field		subfield	
Rush request		subfield	
Receiving note		subfield	
Ordered ISBN/ISSN		subfield	

Figure 7 – Import Profile Details Page – PO Line Information Tab

- 3 In the **Ordered ISBN/ISSN** field, enter the ISBN field containing the identifier for the desired item in the EOD.

Ordered ISBN/ISSN	949	subfield	z
-------------------	-----	----------	---

Figure 8 – Ordered ISBN/ISSN Field and Subfield with Values

The identifier referenced by the **Ordered ISBN/ISSN** field displays on the PO Line Summary page (**Acquisitions > Purchase Order Lines > Review**, click **Edit** for a PO line), in the **Identifier** field.

The other identifiers display in the **Proposed identifier** field when clicking the drop-down arrow.

The screenshot shows the 'PO Line Summary' page for a purchase order line. The page is divided into several sections: 'Ordered items', 'Vendor information', 'Pricing', 'Funding', 'PO Line details', and 'Renewal'. In the 'PO Line details' section, the 'Identifier' field contains the value '1098-7371' and the 'Proposed Identifier' field is a dropdown menu. Both fields are highlighted with a red rectangular border. Other fields include 'Acquisition method' (Purchase), 'Invoice status' (No invoice), 'Material type' (Journal), 'Reporting Code', 'Vendor reference number', and 'Renewal' options.

Figure 9 – PO Line Summary Page — Identifier and Proposed Identifier Fields

Add Multiple Electronic Resources to a PO Line

Description

The purpose of this enhancement is to provide the ability to associate multiple electronic resources with a PO line. With the February release:

- When manually ordering an electronic resource from the level of a bibliographic record, Alma creates multiple portfolios if the bibliographic record has multiple URLs, and associates the created portfolios with the same PO line (see the Technical Instructions below for an example).
- Operators can associate multiple electronic resources with the same PO line using the relevant Electronic Resource Editor (see the Technical Instructions below for an example).

- Upon import of EOD (Embedded Order Data), Alma creates multiple portfolios if the bibliographic record has multiple URLs and associates the created portfolios with the same PO line (see Integrate Import Process with Local Package – Including Support for Multiple URLs on page 46) for additional details.

Technical Instructions

The following roles can access this capability:

- Purchasing Operator
- Purchasing Manager
- Inventory Operator

To view Alma's handling of multiple URLs when manually ordering an electronic resource from the level of a bibliographic record:

- 1 Identify/locate a bibliographic record that you want to order that contains multiple URLs. The example title below, *Commentaries on the Constitution of the United States*, contains multiple URLs (856 \$u fields).



Figure 10 - E-Resource with Multiple 856 \$u Fields

- 2 Create a PO from the Alma MD Editor (**Tools > MARC 21 Bibliographic > Create PO Line & Exit**) or from staff search results (click the **Order** link for the title). (The following uses the *Commentaries on the Constitution of the United States* example.)
 - a Enter the required PO information.

PO Line Owner and Type

Cancel Create PO line

Tools

1 **Commentaries on the Constitution of the United States / by Chester James Antieau.**
Book By Antieau, Chester James. (Buffalo, NY : Dennis & Co c1960.)
 Subject: United States. -- Constitutional law. -- United States Constitutional law. and others

Description * Commentaries on the Constitution of the United States / by Chester James Antieau.

Purchase Type * Electronic Book - One Time

PO Line Owner * Main Library

Load from Template

Figure 11 - Required PO Line Information Entered

- b Click **Create PO Line**. Two portfolios are created and associated with the PO line.

PO Line Summary

Back to PO Line list Save and continue Go

A new PO Line was created. Please review it.

Description [Commentaries on the Constitution of the United States / by Chester James Antieau. Buffalo, NY. : Dennis & Co. c1960.](#) Order/Line - / POL-3612 Status In Review (2014-01-21)

Order line type Electronic Book - One Time Ordering for Main Library Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes

Attachments

Ordered items

License View license

Name	Type	Activation status	Activation date	Edit
Commentaries on the Constitution of the United States /	-	Not Active	-	Edit
Commentaries on the Constitution of the United States /	-	Not Active	-	Edit

Figure 12 - PO Line Summary Page with Multiple Portfolios Created

- 3 View the URL information created for each portfolio.
 - a Click **Edit** for the first portfolio and select the **Linking Information** tab.

Electronic Portfolio Editor

Resource description [Commentaries on the Constitution of the United States / Antieau, Chester James. Dennis & Co Buffalo, NY : c1960.](#)

Interface Name -

Service Type Full Text

Portfolio Information Linking Information Coverage Information Notes

Url <http://www.heinonline.org/HOL/Page?handle=hein.beal/cocunst0001&id=1&size=2&collection=cow&index=cowbooks>

Url (override)

Proxy enabled No Yes

Proxy selected Default (currently, none selected)

Test access

Figure 13 - First Portfolio URL

- b Click **Cancel** to return to the PO Line Summary page.
- c Click **Edit** for the second portfolio and select the **Linking Information** tab.



Figure 14 - Second Portfolio URL

To add multiple electronic resources to a PO line using the Electronic Portfolio Editor:

Note: The following is one example of adding multiple electronic resources to a PO line for a portfolio. Similarly, this enhancement also applies to packages and databases.

- 1 Identify/locate the PO line number to which you want to add an electronic resource. For example, PO line POL-63922 (see below):

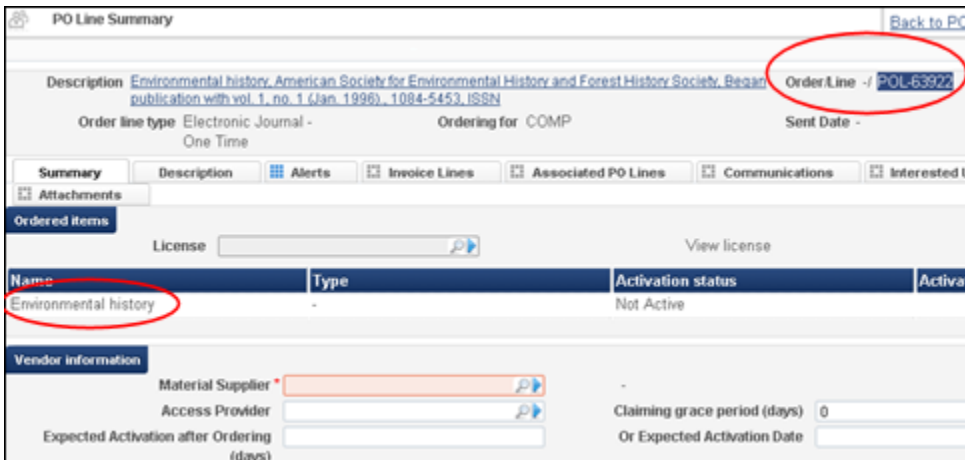


Figure 15 - PO Line Number

- 2 In the Portfolio Information tab on the Electronic Portfolio Editor page (**Resource Management > Repository Search**, select **Electronic Portfolio**, enter your search criteria, and click **Edit** for the electronic resource that you want to add to the PO line), enter the PO line number that you identified in the previous step to connect the electronic resource that you are editing to the existing PO line, and select the PO line that displays. The system dynamically updates the PO line details.

Electronic Portfolio Editor

Resource description [History History \(Helen Dwight Reid Educational Foundation : Online\) began with v. 1, no. 1 \(Oct. 1972\). I0361-2759](#)

Electronic Collection name [EBSCOhost History Reference Center](#)

Service Type Full Text

Portfolio Information Linking Information Coverage Information Notes

Portfolio availability Not Available Available Electronic material type

Activation date 05/12/2013 Expected activation date

Library

PO Line **POL-63922** PO line details

Package PO Line -

PDA ID - PDA name

Created by electronic inventory creator (05/12/2013) Updated

Figure 16 - Enter PO Line Number

Electronic Portfolio Editor

Resource description [History History \(Helen Dwight Reid Educational Foundation : Online\) HELOREF Publications Washington, DC : B began with v. 1, no. 1 \(Oct. 1972\). I0361-2759](#)

Electronic Collection name [EBSCOhost History Reference Center](#)

Service Type Full Text

Portfolio Information Linking Information Coverage Information Notes Group Settings

Portfolio availability Not Available Available Electronic material type Journal

Activation date 05/12/2013 Expected activation date -

Library

PO Line POL-63922 PO line details -

Package PO Line **POL-63922/Environmental history**

PDA ID - PDA name -

Created by electronic inventory creator (05/12/2013) Updated by electronic inventory creator (05/12/2013)

Figure 17 - Select the PO Line Listed

Electronic Portfolio Editor

Resource description [History History \(Helen Dwight Reid Educational Foundation : Online\) HELOREF Publications Washington, DC : P began with v. 1, no. 1 \(Oct. 1972\). I0361-2759](#)

Electronic Collection name [EBSCOhost History Reference Center](#)

Service Type Full Text

Portfolio Information Linking Information Coverage Information Notes Group Settings

Portfolio availability Not Available Available Electronic material type Journal

Activation date 05/12/2013 Expected activation date

Library

PO Line POL-63922 **PO line details POL-63922**

Package PO Line -

PDA ID - PDA name -

Created by electronic inventory creator (05/12/2013) Updated by exl_support (14/01/2014)

Figure 18 - PO Line Details Dynamically Updated

- 3 Click **Save**. The system displays a successfully updated confirmation message.

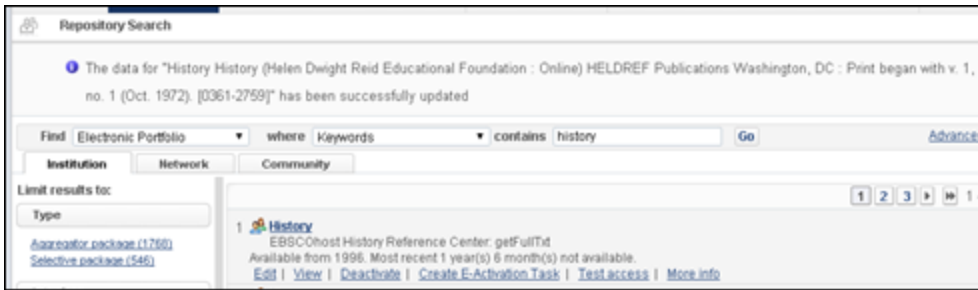


Figure 19 - Save/Update Confirmation Message

- 4 To view your changes, access the PO line number from step 1 (**Acquisitions > Purchase Order Lines > Review**, locate the PO line number and click **Edit**).

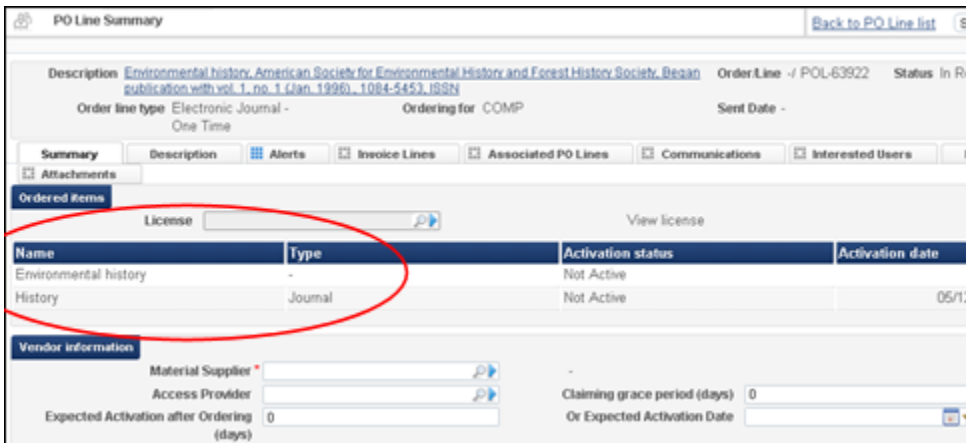


Figure 20 - PO Line with Multiple Electronic Resources

Improved Handling of Inventory Updates Related to Holdings Call Numbers

Description

The purpose of this enhancement is to improve the handling of inventory updates related to shelf-ready vendor update orders and call numbers. Specifically, this change is related to the handling of:

- Holdings records and items that already exist from previous PO lines and the items are already on the shelf (naturally, with spine labels)
- Additional items that are ordered via an import profile

Prior to this release, the newly ordered items were added to the existing holdings record. This was problematic in some cases because the call number of the existing holdings record was changed to come from the existing bibliographic record. This situation created an inconsistency between the actual call number of the items (and related spine labels) of

existing physical items and the call number in Alma. They were different and, therefore, what appeared to the end user was not what was on the spine label. This made it impossible for an end user to find the item on the shelf.

With the February release, when a new PO line is created and a PO line and holdings record already exist:

- The existing holdings record does not get changed. Instead, a new holdings record is created with the call number of the bibliographic record.
- Optionally, the library can manually change the call number of the new holdings record. This prevents the situation of a record's call number being different than an existing physical item's call number and its corresponding spine label.

Quick Add Now Available for Adding Items and Funds to PO Lines

Description

The purpose of this enhancement is to provide the Quick Add feature when adding items and funds to the PO line Summary tab. The Quick Add feature has a distinctive look that differentiates it from the rest of the page. The advantages of this feature are that you can add information faster because only the Quick Add area refreshes instead of the whole page, and the page does not redisplay from the top after adding information. In addition, pressing the **Enter** key has the same functionality as clicking **Add**.

The Quick Add feature may be added to other areas of Alma in the future.

Technical Instructions

The following roles can access this enhancement:

- Purchasing Manager
- Purchasing Operator

To access this feature:

- 1 Open the PO Line Summary page (**Acquisitions > Purchase Order Lines > Review**). The Quick Add feature is available under the Ordered Items and Funding sections.

ExLibris Alma - GA

PO Line Summary

Description: 02012012-054021 Barnes & Noble Library of Essential Reading... ISBN: 9780760785455 (Paperback, ISBN)

Order Line: POL-3704 Status: In Review (2012-02-08)

Order line type: Print Book - One Time

Ordering for: Main Library

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

Ordered Items

Quick Add

Number of items to add: 1 Library Location: [dropdown]

No records were found.

Receiving note: [text field]

Vendor information

Material Supplier: 0-1230-123-123

Claiming grace period (days): 0

Or expected receipt date: 08/02/2012

Order (0-1230/Ebsco - Main Library (0-123-123))

Expected receipt after ordering (days): 0

Pricing

List Price: 5.00 USD

Quantity for pricing: 1

Net price: 5.00 USD

Discount (%): 0.0

Funding

Quick Add

Fund: [dropdown] Percent: 50.0 Amount: 2.50 USD Add Fund

#	Fund Name	Percent	Amount	
1	Accounting and Finance Resources (01/01/2013 - 30/12/2013) (486.36 USD)	50.0%	2.50 USD	Delete
Total	-	50.0%	2.50 USD	

Redistribute Lines

Figure 21 – Quick Add

- Fill in the fields as described in the **Purchasing** section of the *Alma Acquisitions Guide* and the online help.

Other Acquisitions Enhancements

- The **Note to vendor** and **Rush** fields from the PO line now appear in the Order Now letter, in addition to the Order List letter.

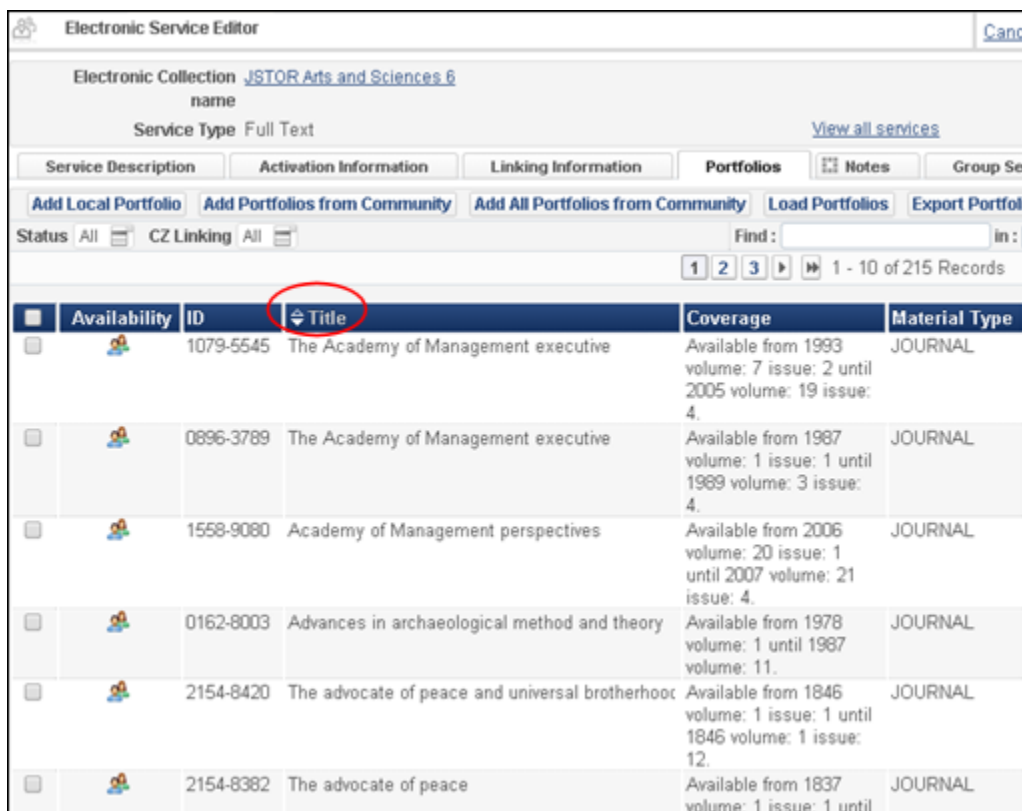
Resource Management

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

Electronic Collection Editor and Electronic Service Editor Improvements for Managing Electronic Resources

Description

The purpose of this enhancement is to provide additional information and efficiencies when working in the Alma Electronic Collection Editor and the Electronic Service Editor. Specifically, the Title column in the Portfolios tab of the Electronic Service Editor has been enabled to sort in ascending and descending order (see Figure 22 and Figure 23).



Availability	ID	Title	Coverage	Material Type
<input type="checkbox"/>	1079-5545	The Academy of Management executive	Available from 1993 volume: 7 issue: 2 until 2005 volume: 19 issue: 4.	JOURNAL
<input type="checkbox"/>	0896-3789	The Academy of Management executive	Available from 1987 volume: 1 issue: 1 until 1989 volume: 3 issue: 4.	JOURNAL
<input type="checkbox"/>	1558-9080	Academy of Management perspectives	Available from 2006 volume: 20 issue: 1 until 2007 volume: 21 issue: 4.	JOURNAL
<input type="checkbox"/>	0162-8003	Advances in archaeological method and theory	Available from 1978 volume: 1 until 1987 volume: 11.	JOURNAL
<input type="checkbox"/>	2154-8420	The advocate of peace and universal brotherhood	Available from 1846 volume: 1 issue: 1 until 1846 volume: 1 issue: 12.	JOURNAL
<input type="checkbox"/>	2154-8382	The advocate of peace	Available from 1837 volume: 1 issue: 1 until	JOURNAL

Figure 22 - Title Column Sort - Ascending

Electronic Service Editor

Electronic Collection [JSTOR Arts and Sciences 6](#)
name

Service Type Full Text [View all services](#)

Service Description Activation Information Linking Information Portfolios Notes Group Settings

Add Local Portfolio Add Portfolios from Community Add All Portfolios from Community Load Portfolios Export Portfolios

Status All CZ Linking All Find: 1 2 3 1 - 10 of 2

Availability	ID	Title	Coverage	M.
<input type="checkbox"/>	0044-3646	Zeitschrift für vergleichende Sprachforschung	Available from 1968 volume: 82 issue: 1 until 1987 volume: 100 issue: 2.	JC
<input type="checkbox"/>	0937-2679	Zeitschrift für vergleichende Sprachforschung auf dem Gebiete des deutschen, griechischen und lateinischen	Available from 1852 volume: 1 issue: 1 until 1874 volume: 22 issue: 6.	JC
<input type="checkbox"/>	0937-2229	Zeitschrift für vergleichende Sprachforschung auf dem Gebiete der indogermanischen Sprachen	Available from 1877 volume: 23 issue: 1 until 1967 volume: 81.	JC
<input type="checkbox"/>	0932-3988	Zeitschrift für Mundartforschung	Available from 1935 volume: 11 issue: 1 until 1968 volume: 35.	JC
<input type="checkbox"/>	0932-1322	Zeitschrift für hochdeutsche Mundarten	Available from 1900 volume: 1 until 1905 volume: 6.	JC
<input type="checkbox"/>	0044-1449	Zeitschrift für Dialektologie und Linguistik ZDL	Available from 1969 volume: 36 issue: 1 until 2008 volume: 75	JC

Figure 23 - Title Column Sort – Descending

In addition, the Electronic Collection Editor has a new column that displays the number of active portfolios (see Figure 24).

Electronic Collection Editor [Cancel](#) [Save](#)

Electronic Collection [JSTOR Arts and Sciences 6](#)
name

Electronic Collection Description General Information Additional Information Notes Group Settings

Package Information
Number of portfolios 215 Character set null

Available Services
Add Local Service [Tools](#)

Availability	Service Type	Number of portfolios	Active portfolios	Active from date	Active until date	Actions
<input type="checkbox"/>	Full Text	215	212	-	-	Actions

Figure 24 - New Active Portfolios Column

This expands on the previous capability to filter your portfolio search results for available (active) portfolios (see Figure 25).

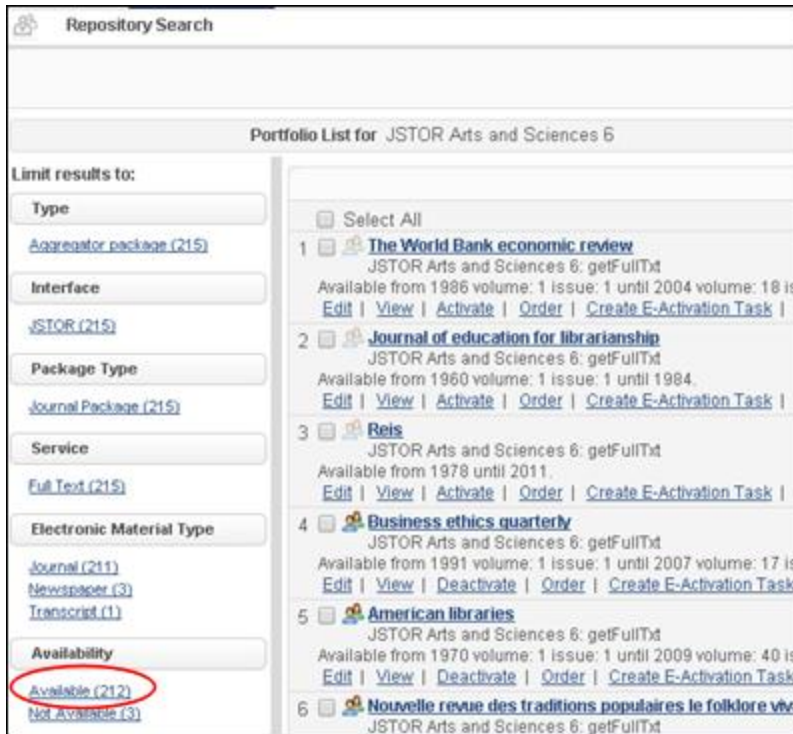


Figure 25 - Available (Active) Portfolios Filter (Previously Available in Alma)

Improved OCLC Number Matching with Alma Resolver

The purpose of this enhancement is to provide improved OCLC number matching with the Alma Resolver. Previously, the OpenURL statement was not finding some OCLC number matches when the 035 field contained \$a and \$z that the system concatenated into a single value for matching purposes.

With the February release, each subfield is being indexed separately for comprehensive matching on the OCLC numbers when the Alma Resolver processes an OpenURL with `rft.oclcnum` in the statement, as in the following example:

```
http://<host>/openurl/EX/example_services_page&rft.oclcnum=12345678
```

New Export Utility for Extracting Electronic Portfolio URLs for Synchronizing with a Proxy Server

Description

The purpose of this enhancement is to provide a method for extracting electronic portfolio URLs from Alma for synchronizing with a proxy server. With this new utility, you can run a job to extract all electronic portfolio URLs or a logical set of URLs. The utility extracts the portion of the URL up to the query string, as in the bolded portion of the example below.

[http://www.yahoo.com/articles](http://www.yahoo.com/articles?artid=1234)?artid=1234

Note: In order to use this export utility, the job requires re-indexing of your electronic inventory so that previously stored URLs in the system can be extracted. Newly added URLs are being indexed as needed for successful extraction. This enhancement becomes fully available after the April 2014 release processing that includes re-indexing. Prior to April, contact Ex Libris Support for assistance.

Technical Instructions

The Inventory Operator role can run the utility to extract URLs.

To extract electronic portfolio URLs:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Export URLs** in the **Record Export** section. The Export Electronic Resource URLs page opens.



Figure 26 - Export Electronic Resource URLs Page

- 2 Specify one of the following options from the Input URLs drop-down list:
 - a **All** and skip to step 5.
 - b **Logical Set** and continue with the next step.

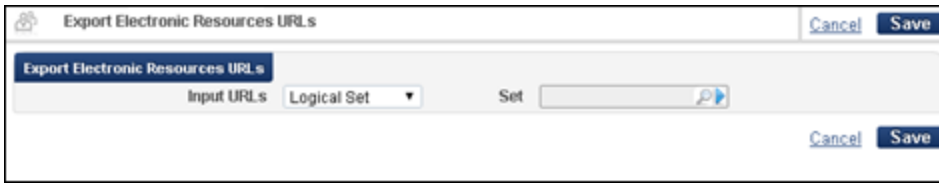


Figure 27 - Logical Set Option

- 3 Browse to locate the set that you previously saved (using Repository Search and Save Query).

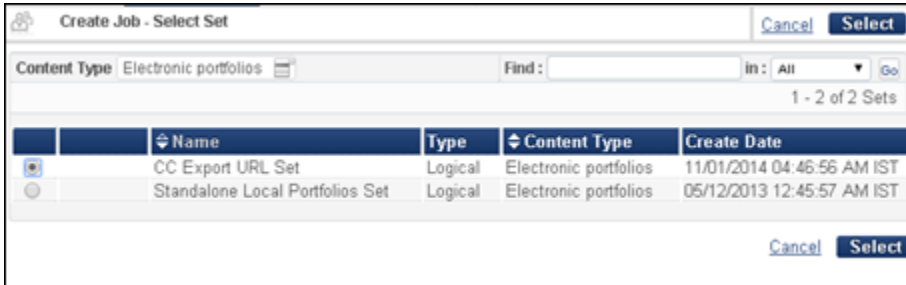


Figure 28 – List of Available Sets

- 4 Click the appropriate radio button for the set you want to use and click **Select**.



Figure 29 - Set Selected

- 5 Click **Save**. A confirmation message displays with the ID number of the job that is being run to extract the URLs.

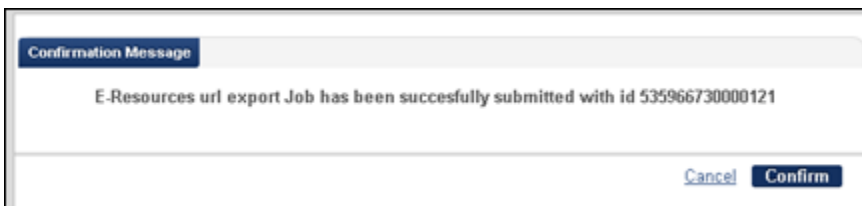


Figure 30 - Confirmation Message with Job ID Number

- 6 View the job results.
 - a From the Completed tab on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click **Actions > Report** for the Export Electronic Resource URLs job that you just ran.

Name	Job Category	Creator	Submit Date	Start Date	End Date	Status	Failed Records
Export Electronic Resources URLs	Repository	exl_support	11/01/2014 04:48:50 AM IST	11/01/2014 04:48:51 AM IST	11/01/2014 04:48:51 AM IST	Completed Successfully	
Export Electronic Resources URLs	Repository	exl_support	11/01/2014 04:30:05 AM IST	11/01/2014 04:30:05 AM IST	11/01/2014 04:30:07 AM IST	Completed Successfully	

Figure 31 - Completed Tab on the Monitor Jobs Page

- b On the Job Report page, click the **Link to exported records** link.

Process ID	535966730000121	Name	Export Electronic Resources URLs
Started on	11/01/2014 04:48:51 AM IST	Finished on	11/01/2014 04:48:51 AM IST
Total run time	0.262 Seconds	Created by	exl_support
Status	Completed Successfully	Status date	11/01/2014 04:48:51 AM IST
Records processed	0	Records with exceptions	-

Records processed	0
Records exported	0

Link to Exported records: [EXPORT_URLS_535966730000121](#)

Figure 32 - Job Report Page

The Exported Files page displays with the file that contains your extracted URLs.

Directory Name	535966730000121	Type	EXPORT_URLS
Submitted By	exl_support	Folder	Institution

Name	Type	Date Created	Size
url_export.csv	File	11/01/2014	64 bytes

Figure 33 - Exported Files Page

- c Select **Actions > Download**.
- d Open the `.csv` file created that contains the extracted URLs.

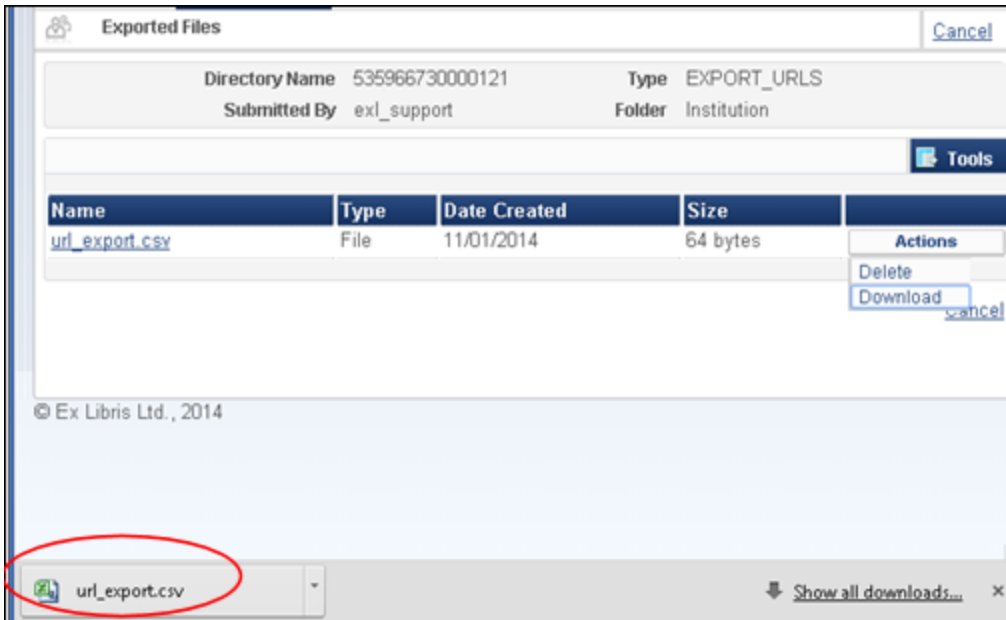


Figure 34 - Open the .csv File

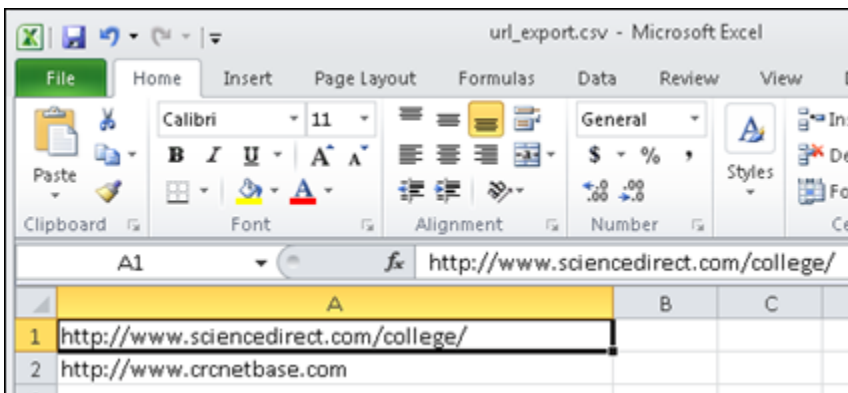


Figure 35 - .csv File

Physical Item Sort Routines

Description

The purpose of this enhancement is to provide more flexibility for determining the sort order display of physical items in the Receive New Material page's Continuous tab (**Acquisitions > Receiving and Invoicing > Receive**, then select the **Continuous** tab and **Actions > Manage Items**), the staff search physical items list, and with Get It. With the February release, Alma provides new configuration options for creating your own custom sort routines as well as out-of-the-box default sort routines. The sort routines display in a drop-down list that allows you to dynamically switch from one sorted view to another. See below for examples of each new sort routine location.

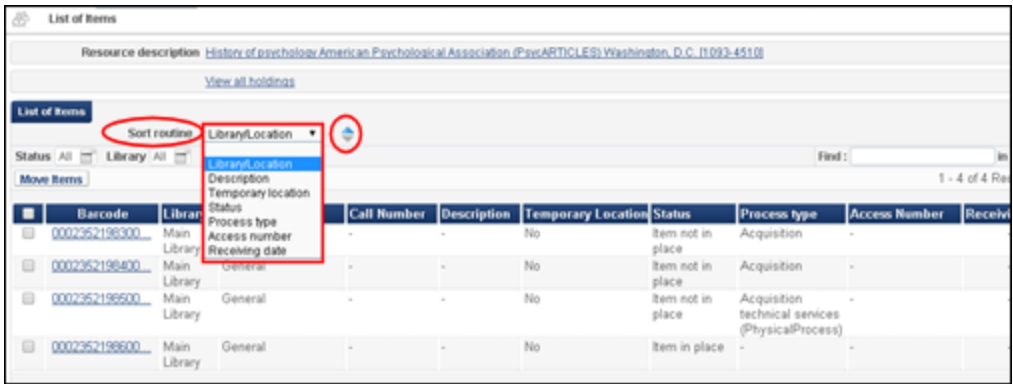


Figure 36 - Sort Routines for the Staff Search Physical Items List

To the right of the drop-down list are up/down arrows that allow you to dynamically switch between ascending and descending order for the sort routine that you have selected.

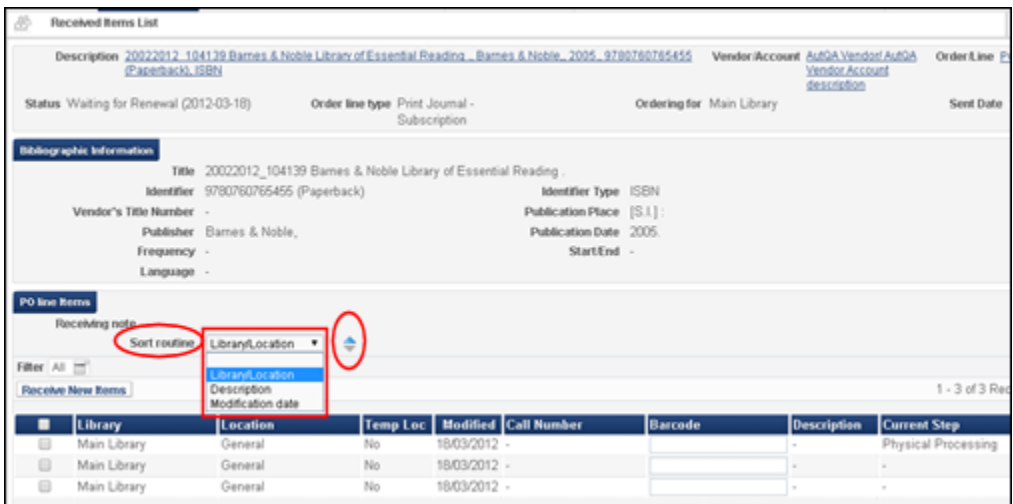


Figure 37 - Sort Routines for Actions > Managing Items from the Receive New Material Continuous Tab



Figure 38 - Alma Resolver Get It Services (Displayed on the Alma Electronic Services Page)

Technical Instructions

The General System Administrator role can configure this capability.

To configure item sort routines:

- 1 From the Sort Routine List page (**Resource Management > Resource Configuration > Configuration Menu > General > Physical Item Sort Routines**), click **Add Sort Routine**. The first step of the sort routine wizard opens.
- 2 Enter the name and description for the sort routine and click **Next**. Step 2 of the sort routine wizard opens.
- 3 Select the sort order (ascending or descending) for this routine.
- 4 Select the fields that you want to sort.

Sort routine list

Name CC Sort Routine
Description CC Sort Routine

Routine order
Order Ascending Order Descending Order

Sorts selected
No records were found.

Available sort fields

	Sort name	Description
<input checked="" type="checkbox"/>	Chronology 1 (year)	Chronology 1
<input checked="" type="checkbox"/>	Description	The item description
<input checked="" type="checkbox"/>	Enumeration A (volume)	Enumeration A
<input checked="" type="checkbox"/>	Enumeration B (issue)	Enumeration B
<input checked="" type="checkbox"/>	Enumeration C (part)	Enumeration C
<input checked="" type="checkbox"/>	Library	The library name
<input checked="" type="checkbox"/>	Location	The location name

Add to Selection

Figure 39 - Select Fields to Sort

- 5 Click **Add to Selection**.

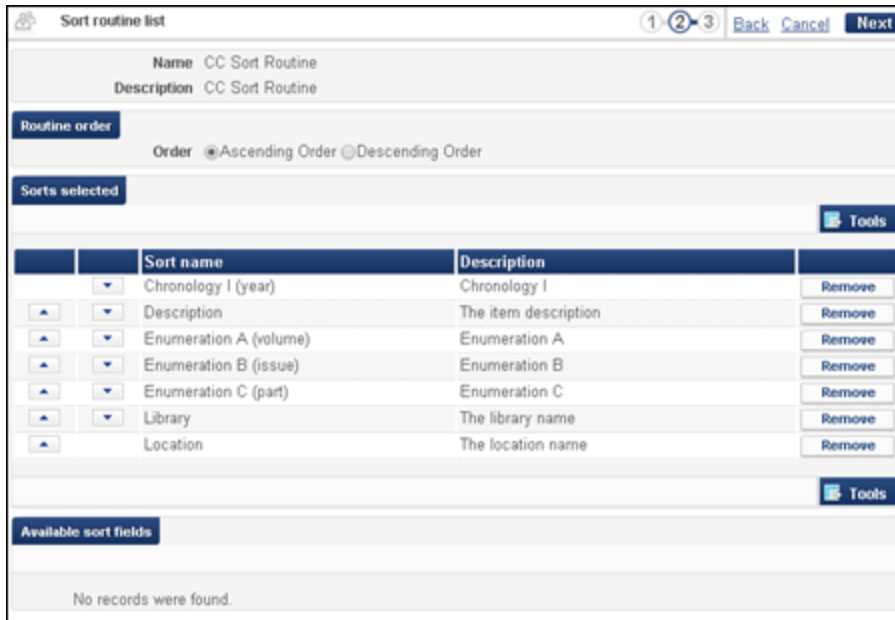


Figure 40 - Sort Fields Selected

- 6 Use the up/down arrows to the left of the selected fields to identify the order in which you want this fields sorted and click **Next**. Step 3 of the sort routine wizard opens.
- 7 Select the item list in which you want this sort routine to be available and select if it should be the default sort routine to be used.

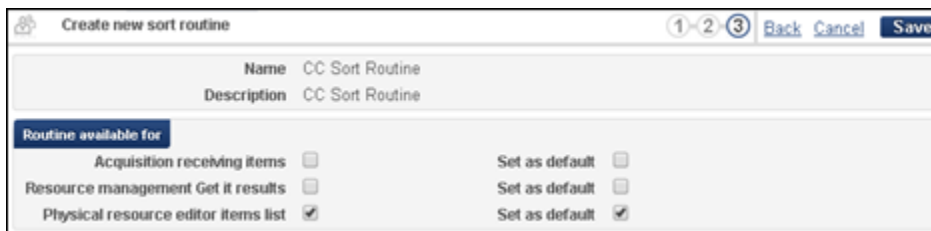


Figure 41 - Sort Routine Available For Selections

- 8 Click **Save**. The new sort routine is added to the list of routines on the Sort Routine List page.

Preferred Term Correction Enhancements

Description

The **Authorities – Preferred Term Correction** job, a system-controlled, scheduled job that has until now been disabled, can now be enabled (see the [Technical Instructions](#) below) so that preferred term correction is performed, as required, on all bibliographic records that are linked to authority records via the **Authorities – Link Bibliographic Headings** job (refer to the documentation for an explanation of this job).

For example, if a bibliographic record contains the non-preferred term "Narcotics, Control of," and the associated authority record contains the preferred term "Drug control," the Authorities – Preferred Term Correction job replaces "Narcotics, Control of" with the preferred term "Drug control." Note that bibliographic records are also updated with any subsequent updates to authority records.

Note: For customers in implementation, the Authorities – Preferred Term Correction job will be enabled by default upon "Go Live."

In addition to preferred term correction, enhancements in this area include the following:

- Job reporting (see [Authorities – Preferred Term Correction Job Reporting](#) below)
- Punctuation improvements for updated bibliographic records (see [Punctuation](#) below)

Authorities – Preferred Term Correction Job Reporting

When the Authorities – Preferred Term Correction job is run, a bibliographic record correction report, containing the following information, is provided:

- MMS record ID
- Vocabulary code
- Field number
- Old value
- New value

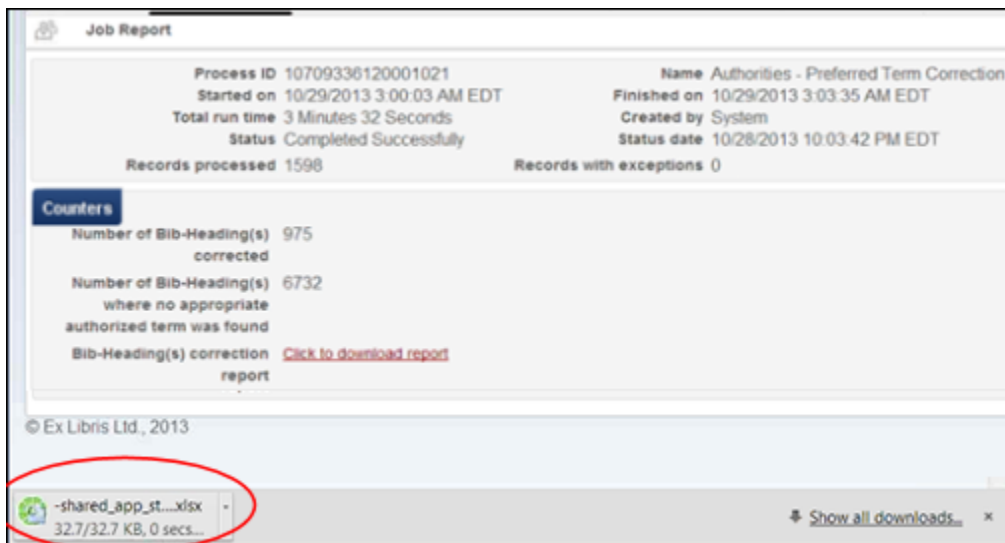


Figure 42 - Download the Bibliographic Record Correction Report from Alma (.xlsx File)

A	B	C	D	E
MMS	Vocabulary code	Field number	Old value	New value
9999475400001021	LCNAMES	700	"\$\$a Sweitzer, Henry, \$\$d -1808?, \$\$e printer. "	"\$\$a Sweitzer, Henry, \$\$d 1771-1807, \$\$e printer. "

Figure 43 - Bibliographic Record Correction Report Example

Punctuation

The following punctuation rules are implemented when bibliographic records are updated from the authority database:

(1) Tag and Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
1####	a		.	.
1####	d		.	-,
100##	a	4	.	
100##	d	4	,	
110##	b		.	.
600##	a		.	.
600##	b	a	,	
600##	d	a	,	,
600##	d		.	,'
600##	q		.).
600##	t		.).
6####	a		.	-).
6####	v		.	.
6####	x		.).
6####	y		.	.
6####	z		.	.

(1) Tag and Indicators	(2) Subfield to Which Punctuation Is Added	(3) Subfield Following the Subfield in Column (2)	(4) Punctuation to Be Added	(5) If Punctuation Exists/Does Not Exist Condition
7####	a		.	-).
7####	a	4	.	
7####	a	e	,	
7####	a	d	,	-),.
7####	d	e	,	-),.
7####	c	e	,	-),.
7####	q	e	,	
7####	b		.	,,
7####	b	e	.	,,
7####	d		.	,,
7####	d	t	.	.
800##	t	v	;	;
810##	t	v	;	;
83###	a	v	;	;

Column (1) = This column specifies the tag and indicators to which the rule applies.

Column (2) = This column identifies the subfield to which the punctuation may need to be added. If nothing is specified in Column (3), the subfield in column (2) is assumed to be the last subfield specified for the tag.

Column (3) = This column specifies the subfield that follows the subfield in column 2 when punctuation may need to be added.

Column (4) = This column identifies the punctuation that is to be added when the rule conditions are met.

Column (5) = This column is used to determine whether or not the punctuation in column (4) is added to the subfield identified in column (2). It provides the following rule conditions:

- If any of the punctuation specified in this column exists, the punctuation specified in column (4) is not added.
- If there is no punctuation specified in this column (the cell is blank), the punctuation in column (4) is added if all other conditions are met.

Technical Instructions

To enable the Authorities - Preferred Term Correction job, you must have one of the following roles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

To enable the Authorities - Preferred Term Correction job:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Other Settings** under **General**. The CustomerParameters mapping table for the Resource Management component opens.
- 2 Locate the **disable_preferred_term_correction_job** parameter, click **Customize**, and set the parameter to **false**. (By default, the parameter is set to **true** and the job is disabled.)

Table Information							
Sub System		INFRA		Table Name		CustomerParameters	
Updated By		-		Last Updated		-	
Table Description				Customer Parameters			
Mapping Table Rows							
Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	Tools
	access_right_default_pc	repository	Restrict		-	-	Customize
	call_number_type	repository	0		admin1	01/13/2014	Restore
	course_restricted_bib_d	repository	false		-	-	Customize
	course_restricted_field	repository			-	-	Customize
	disable_preferred_term	repository	false	true -> the linking job won	-	-	Restore

Figure 44 – disable_preferred_term_correction_job Parameter

- 3 Click **Save** at the top or bottom of the page.
- 4 Access the **Scheduled** tab of the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**) and confirm that the Authorities – Preferred Term Correction job is active (yellow check mark in the Active column).

Note: The Authorities – Preferred Term Correction job does not handle preferred term correction on records retroactively. It handles preferred term correction only for authority record updates and link updates that occur after the Authorities – Preferred Term Correction job is enabled.

Integrate Import Process with Local Package – Including Support for Multiple URLs

Description

The improvements described here build on the November release’s electronic import portfolio development, which introduced the loading of new portfolios into a package.

The February release expands the capabilities of importing electronic resources in the context of packages with the following enhancements:

- Updating portfolios that are already part of a package
- Handling electronic resources with multiple URLs

In the context of packages, an import results in the following:

- If the loaded electronic resource is not part of the package, a new portfolio is created in the package.
- If the loaded electronic resource exists as a single portfolio in the package, the portfolio is updated with relevant information such as URL and notes.
- If the loaded electronic resource is not part of the package and has multiple URLs, it is possible to create multiple portfolios in the package, one portfolio per URL.
- If the loaded electronic resource has multiple URLs but already has portfolios as part of the package, Alma recreates the portfolios by removing the specific existing portfolios and recreating new ones, one portfolio per URL (retaining any order-related information that was associated with the old portfolios).

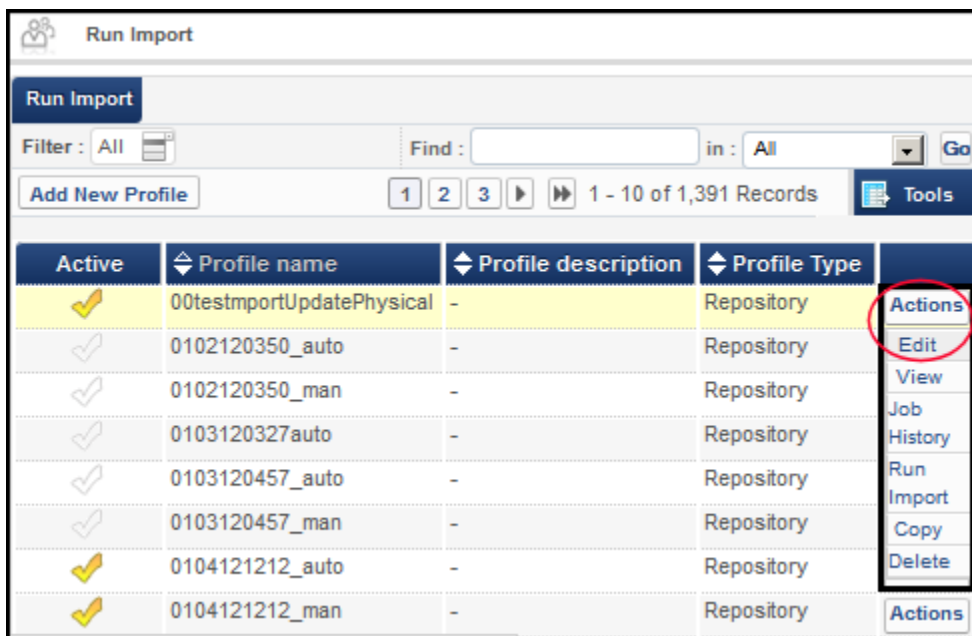
Technical Instructions

The following roles can access these features:

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

To configure these new inventory import features:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), under **Record Import**, click **Import Profiles**. The Run Import page opens.



The screenshot shows the 'Run Import' page with a table of import profiles. The table has columns for 'Active', 'Profile name', 'Profile description', and 'Profile Type'. The 'Actions' column is highlighted, and the 'Edit' option is circled. The table contains the following data:

Active	Profile name	Profile description	Profile Type	Actions
✓	00testimportUpdatePhysical	-	Repository	Actions
✓	0102120350_auto	-	Repository	Edit
✓	0102120350_man	-	Repository	View
✓	0103120327auto	-	Repository	Job
✓	0103120457_auto	-	Repository	History
✓	0103120457_man	-	Repository	Run
✓	0104121212_auto	-	Repository	Import
✓	0104121212_man	-	Repository	Copy
✓	0104121212_man	-	Repository	Delete
				Actions

Figure 45 - Import Configuration—Run Import Page

- 2 Click the **Add New Profile** button to configure a new import profile, or select an existing one you want to enhance with the new capabilities, and select **Actions > Edit**.

Note: Existing profiles have been loaded by default as standalone. They can be changed to package imports using this procedure.

- 3 Complete the wizard to the Inventory Information page or, if you are editing an existing profile, click the **Inventory Information** tab.

Inventory Operations

Electronic Physical Mixed

E-Book Mapping

Portfolio type Standalone Part of a package

Package

Service

Material type

Multiple portfolios Single portfolio

Extract access URL from field subfield Indicators to skip (use # for empty indicator)

Extract internal description note from field subfield

Figure 46 - Inventory Information Tab (or Wizard Step) with Electronic Mapping Fields

- 4 Select **Electronic** or **Mixed** from the Inventory Operations section.

Note: The import portfolio works only when Electronic or Mixed is selected.

- 5 For **Portfolio Type**, select **Part of a package** to import portfolios into an available package and corresponding service.
- 6 Select **Multiple portfolios** or **Single portfolio** for import.
- 7 Enter the **Extract access URL** field and subfield followed by any indicators to skip.
- 8 Enter any additional non-required fields. For library subfield, note that for multiple portfolios, the first library entered will be assigned for all remaining portfolios.

Improve Import Error Handling

Description

The February release delivers improvements in Alma's handling of errors during record imports:

- More and better information about the cause of errors for operators who need to manually correct them
- Successful importing of partial loads when only some records have validation problems and need to be failed
- Improvements in reporting and event messaging overall

- Ability to filter issues according to job ID
- Enhanced reports with Network Zone information and links

Additional improvements in import error handling will be introduced in future releases.

Technical Instructions

The following roles can handle import errors:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator

To view the new capabilities for resolving import issues:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), under **Record Import**, click **Import Profiles**. The Run Import page opens.

Note: If you have not yet run the import, do so before proceeding with this procedure. Select **Actions > Run Import** from the row of the profile you want to run.

- 2 Use the Filter and/or the Find feature to help locate your profile.
- 3 Select **Actions > Job History** from the row containing the import you want to view.

Active	Profile name	Profile description	Profile Type	Action
✓	2909120541_DoubleMDImport_auto	-	Repository	Action
✓	2909120541_DoubleMDImport_man	-	Repository	Edit
✓	3008120551_bin_auto_import	-	Repository	View
✓	3008120602_DoubleMDImport_auto	-	Repository	Job History
✓	3008120602_DoubleMDImport_man	-	Repository	Run Import
✓	3009120539_bin_auto_import	-	Repository	Copy
✓	3009120545_DoubleMDImport_auto	-	Repository	Delete
✓	3009120545_DoubleMDImport_man	-	Repository	Action

Figure 47 - Getting to Job History from Run Import Page

- On the Job History page, find the Job ID whose report you want to view and select **Actions > Report** in its row. The job report opens with summary information at the top and **Counters** (statistics) on the main portion of the page.

Job Report		Back	
Process ID	2319559980000121	Name	Metadata Import: 111
Started on	29/12/2013 10:53:01 IST	Finished on	29/12/2013 10:53:18
Total run time	16 Seconds	Created by	admin1
Status	Completed Successfully	Status date	29/12/2013 10:53:18
Records processed	2	Records with exceptions	0
Counters			
Number of records processed	420		
Number of matches found	420		
Number of records added	0		
Number of records not added	420		
		Download records which were not added since they were marked for delete (420)	
Multi Matched Solved	0		
Number of records merged	0		
Number of records skipped merge	0		
Number of records overlaid	0		
Number of records skipped overlay	0		
Number of linked records overlaid/merged	0		
Total records marked for delete	420		
Number of records deleted	0		
Total POlines number	0		
Number of polines created	0		
Number of polines updated	0		
Total number of inventory resources	0		

Figure 48 - Job Report Containing Information on Records Marked for Delete

The example above shows a new type of information added for the February release: records marked for delete are shown as totals in several lines and can be downloaded by clicking the underlined text.

Additional information provided in this release relates to counts for Network Zone importing and matching, as shown below.

Counters	
Number of records processed	456
Number of matches found	0
Number of records added	4
Number of records not added	0
Number of records merged	0
Number of records skipped merge	0
Number of records overlaid	0
Number of records skipped overlay	0
Number of linked records overlaid/merged	0
Number of records deleted	0
[.....rows hidden for spacing reasons.....]	
Number of POLines skipped no resource type	0
Number of headings created	23
Number of matches found in NZ	452
Number of records added to NZ	0
Number of records not added to NZ	86
	Download records which were not added due to match issues (4)
	Download records which were not added due to multi matches automatic handling (82)
Multi Matched Solved	0
Number of records merged in NZ	370
Number of records skipped merge in NZ	0
Number of records overlaid in NZ	0
Number of records skipped overlay in NZ	0

Figure 49 - Job Report for Network Zone Import Match Issues

Convert Logical Sets to Itemized Sets

Description

The purpose of this enhancement is to enable you to convert logical sets to itemized sets.

In Alma, there are two types of sets: logical sets and itemized sets. Logical sets are determined by criteria that you define and itemized sets consist of a fixed list of items that you associate

with the set. The items of a logical set can change if the results of the query change – for example, if items are added to the repository – while the items of an itemized set are fixed. This feature allows you to create a fixed itemized set based of the criteria of an existing logical set.

Technical Instructions

The following roles can access this enhancement:

- Cataloger
- Catalog Administrator
- Physical/Electronic/Digital Inventory Operator
- Preservation Analyst/Manager
- Requests Operator

To convert logical sets to itemized sets:

- 1 On the Manage Sets page (**Resource Management > Manage Sets**), select **Actions > Itemize** for a logical set. The Set Details page opens with the set name filled in.

The screenshot shows the 'Set Details' page in Alma QA. At the top, there's a navigation bar with 'Alma QA', 'Tasks', 'Analytics', and 'Currently at: Memorial Library'. Below that, the 'Set Details' header includes a 'Cancel' button and a 'Submit' button. The main content area shows the 'Set name' as 'Journal of Social Psychology - itemized - 2014-01-12 12:51:31' and the 'Set type' as 'Itemized'. A 'General Information' section follows, containing a 'Set name' field (pre-filled), a 'Description' field, and a 'Note' field. Below these are 'Set content type' (Physical items), 'Private' (No/Yes), 'Status' (Active/Inactive), 'Status date' (05/26/2013 03:54:13 EDT), 'Created by' (exl_support), and 'Updated by' (exl_support). 'Cancel' and 'Submit' buttons are located at the bottom right of the form.

Figure 50 – Set Details

- 2 Fill in the fields and click **Submit**. The following confirmation message opens:

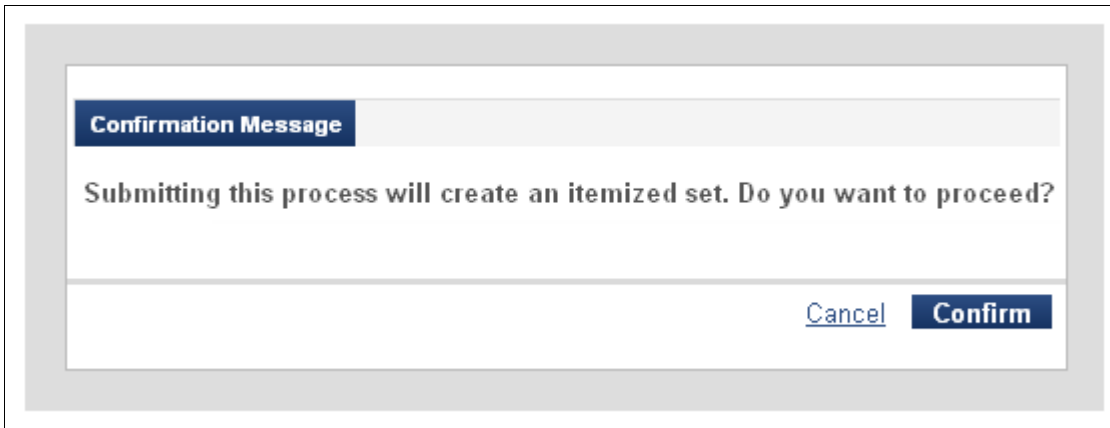


Figure 51 – Confirmation Message

- 3 Click **Confirm**. A job is run to produce the itemized set. You receive an email when the job is completed. The new set is added to the list of sets.

✓	Journal of Social Psychology	Logical	Physical items	05/26/2013 03:54:13 EDT	Actions
✓	Journal of Social Psychology - itemized - 2014-01-12 12:51:31	Itemized	Physical items	01/12/2014 08:21:11 EST	Actions

Figure 52 – Journal of Social Psychology Itemized

Other Resource Management Enhancements

- Records that use the Moys classification are now sorted by the call number in the repository search. Note that this enhancement becomes fully available after the April 2014 release processing that includes re-indexing.

Fulfillment

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

Home/Office Personal Delivery

Description

The purpose of this enhancement is to allow personal delivery of requested physical items to a user's office or home. If configured as described below, an item that is taken off a shelf to fulfill a personal delivery request is put in transit to a desk that is configured to support personal delivery. If the desk at which the item is scanned in does not support personal delivery, the item is transferred to a desk in the item's owning library that supports personal delivery. When scanned in at such a desk, the item is automatically checked out to the patron, and a notice is sent to the patron. To use this functionality, the following must be configured:

- Personal delivery must be supported at the circulation desk.
- Addresses with type **Home** and **Office** must be configured in the requesting user's record.

Once an item is scanned in, the item is checked out immediately and should be sent to the address specified on the Pick-Up Slip.

Known Issues

The following issues are known for this enhancement:

- When scanning in an item belonging to another library that does not have a personal delivery circulation desk, the item's next step is "Put on hold shelf" instead of home/office delivery.
- Notes are not added to the loan, Pick-Up letter, and Hold Shelf letter indicating that the loan is associated with home/office delivery.
- When scanning in an item that has a destination of home/office delivery, no contact card pop-up is provided in the return workbench or the return tab in the loan workbench. The operator must look up the patron record to determine the transfer location.
- The **On shelf policy** field in the Fulfillment Unit configuration is not considered in the personal delivery process.

Technical Instructions

Either of the following roles is necessary to configure this functionality:

- General System Administrator
- Fulfillment Administrator

To configure terms of use:

- 1 On the Fulfillment Configuration page (**Fulfillment > General Configuration > Configuration Menu**), click **Terms of Use and Policies** under **Physical Fulfillment**. The Fulfillment Terms of Use page opens.
- 2 Select **Actions > Edit** next to the request TOU that you want to update. The Terms of Use Details page opens.

The screenshot shows the 'Terms of Use Details' page for Boston University. The page is titled 'Terms of Use Details' and includes a progress indicator (1-2) and 'Cancel' and 'Next' buttons. The configuration is for 'Boston University'. The 'Name' field is '28 Days' and the 'Description' is '28 Day Regular Priority Regular'. Below this is a 'Tools' button. The main configuration area consists of several rows, each with a label, a dropdown menu, and an 'Actions' button. The 'Personal delivery' and 'Personal delivery fee' rows are highlighted with a red box. The 'Personal delivery' dropdown is set to 'Personal Delivery - None (Do not deliver items at all)' and the 'Personal delivery fee' dropdown is set to 'Personal Delivery Fee - No Fee (Personal delivery is not charged with a fee)'. At the bottom, there are 'Cancel' and 'Next' buttons.

Field	Value	Action
Name *	28 Days	
Description	28 Day Regular Priority Regular	
Is Requestable	Requestable (Requestable)	Actions
Pickup Locations	Pickup only in owning library (Must pickup in owning library)	Actions
Hold Shelf Period	7 day Hold Shelf (Default value for HoldShelfPeriod)	Actions
Is Digitizeable	Not Digitizable (Not Digitizable)	Actions
Is Requestable for Resource Sharing	Requestable For Resource Sharing (Item is requestable for Resource Sharing)	Actions
Request Priority	Medium (Medium)	Actions
On Shelf Request Policy	On Shelf Policy, No Requesting (On shelf requesting is not allowed.)	Actions
Personal delivery	Personal Delivery - None (Do not deliver items at all)	Actions
Personal delivery fee	Personal Delivery Fee - No Fee (Personal delivery is not charged with a fee)	Actions

Figure 53 – Terms of Use Details Page

- 3 From the **Personal delivery** drop-down field, select one of the following options to configure personal delivery:
 - Personal Delivery – All (Deliver items to a home or an office address)
 - Personal Delivery – Home (Deliver items only to a home address)
 - Personal Delivery – None (Do not deliver items at all)
 - Personal Delivery – Office (Deliver items only to an office address)
- 4 From the **Personal delivery fee** drop-down field, select a delivery fee option.
- 5 Click **Next**. The Terms of Use Management page opens.
- 6 Click **Save** to confirm your changes.

To enable personal delivery at a circulation desk:

- 1 On the Fulfillment Configuration page (**Fulfillment > General Configuration > Configuration Menu**), select the library containing the circulation desk that you want to configure from the **You are configuring** drop-down list.
- 2 Click **Circulation Desks** under **Library**. The Circulation Desks List page opens.
- 3 Select **Actions > Edit** next to the circulation desk that you want to update. The Circulation Desk – General Information page opens.

The screenshot shows a web form titled "Circulation Desk - General Information". At the top right are "Cancel" and "Save" buttons. Below the title, it says "You are configuring: Main Library". There are four tabs: "General Details", "Physical Locations", "Operators", and "Automatic Printing". The "General Details" tab is selected. The form contains the following fields and options:

- Code *MAIN_CIRC
- Name *Main Circulation Desk
- Primary
- Picks from shelf
- Reading room desk
- Supports personal delivery (This checkbox is highlighted with a red box in the original image)

At the bottom, there is an "Additional Information" section.

Figure 54 – Circulation Desk – General Information Page

- 4 Click **Save**.

To request an item for personal delivery:

- 1 Perform a repository search for the physical item that you want to request.
- 2 Below the item, click **Request**. The Create Request page opens.

The screenshot shows the 'Create Request' form in Alma. The form is titled 'Create Request' and has 'Cancel' and 'Submit' buttons at the top right. The form fields are as follows:

- Title:** Update Order Automation
- Institution:** Main Campus
- Request Type:** Patron physical item request (dropdown)
- Requester:** User, Super (dropdown)
- Note:** (text area)
- Pickup At:** (dropdown menu, highlighted with a red box)

The 'Pickup At' dropdown menu is open, showing the following options:

- No Campus
- Education Library
- Law Library
- Main Library
- Resource Sharing Library
- Personal Delivery** (highlighted with a red box)
- Home Delivery
- Office Delivery

Below the 'Pickup At' dropdown, there is a section for 'Additional Request Attributes' with a 'No records were found' message. There is also an 'Add Request Attributes' button and a 'Material Type' dropdown.

Figure 55 – Create Request Page

- 3 Populate the following fields:
 - **Request Type** – Select **Patron physical item request**.
 - **Requester** – Specify the patron’s name.
 - **Pickup At** – Select either **Home Delivery** or **Office Delivery**.
- 4 Click **Submit**.

Filtering Holdings for 773 Links

The purpose of this enhancement is to improve Alma’s support for 773 linking. Previously, Alma displayed only the first 773 link that was found in the child record in order to link to the parent record. This enhancement will now allow linking to all 773 links in the child record. In addition, filtering by volume, year, and description has been added to the holdings list in the Primo Get It tab to allow users to filter these links from the holdings list instead of drilling down on each holdings record separately.

On-the-Fly Calculation of Terms of Use

The purpose of this enhancement is to calculate the terms of use (TOU) each time an activity is performed on a loaned item (such as renewal). Previously, each activity on a loaned item referred to a TOU contract that was created and stored at the time of the item's original loan.

With this enhancement, any change in a policy, terms of use, fulfillment rule, patron information, or item information will have an immediate effect on a loan's or request's terms of use.

Alma Resolver – Sorting Enhancement

Description

The purpose of this enhancement is to improve the sorting relevance of online services offered by the Alma Resolver Electronic Services page for OpenURLs coming from Primo Central and EBSCO API. A new option has been added to place the highest priority on services that match the source of the OpenURL. For example, if a user searching Primo Central discovers an article from Gale and the Alma Resolver can offer services from Gale and EBSCO, Alma places the service from Gale at the top of the services list, followed by the remaining electronic services, which are sorted as configured on the Online Services Order page (shown below).

Note: If a service has been hidden via the display logic rules, it will not display regardless of this new option. That is, the library-defined display logic rules take precedence and may affect the impact of this new sorting option.

Technical Instructions

One of the following roles is necessary to configure this functionality:

- Fulfillment Administrator
- General System Administrator

To configure this option:

- 1 On the Fulfillment Configuration page (Fulfillment > General Configuration > Configuration Menu), click **Online Services Order** under **Discovery Interface Display Logic**. The Online Services Order page opens.
- 2 Select **Yes** for the **Use source to target ordering** (to be renamed **Prefer source service** with the first February hot fix on February 9th) field. Note that by default, this option is set to **No**.

👤 **Online Services Order**

— Top services

Tools

Add to top

Move Up	Move Down	Service type	Service name	Service value	
▼		DB Service	Package	CC Business Source Complete Online	Remove
▲		Full Text	Interface	Free E- Journals	Remove

— Services to be placed last

Tools

Add to last services

Move Up	Move Down	Service type	Service name	Service value	
▼		Full Text	Interface	American Theological Library Association, ATLA Serials	Remove
▲		DB Service	Package	lala	Remove

Display CZ packages No Yes
first

Use source to target No Yes
ordering

Figure 56 – Online Services Order Page

Support Paging for DLF Loan List APIs

Description

The purpose of this enhancement is to allow customers to utilize the paging feature provided by Primo in the My Account > Loans List. Enabling this functionality allows Primo to fetch loans in bulks. If the user has more loans than the configured bulk size, Primo displays the **Show More Loans** link at the bottom of the My Account > Loans List page, which allows the user to fetch an additional bulk.

If the user invokes the **Renew** or **Renew All** option before all loans have been fetched from Alma, Primo will replace the **Show More Loans** link with the **Refresh List** link, which allows the user to display the updated loans list from Alma.

If this functionality is not enabled, all of the loans display on the My Account > Loans List page.

Technical Instructions

No additional configuration is necessary for this enhancement in Alma, but the following configuration is necessary in Primo to enable paging.

To enable paging in Primo:

- 1 On the Primo Home > Advanced Configuration page, click **All Mapping Tables**.

The All Mapping Tables page opens.

- 2 Click **Edit** in the row containing the ILS Adaptors Templates table.
- 3 In the **Service Name** column, search for **get_loans**.
- 4 For each of the rows that contain an Alma **Adaptor ID** (such as **ALMA_01**), add the following text to the end of the text already configured in the **Call Template** column:

```
&noLoans={{noItems}}&startPos={{startPos}}
```

The full call template should look similar to the following:

```
{{api_base}}/view/rest-dlf/patron/{{patron_id}}/circulationActions/  
loans?lang={{lang}}&view=brief&type={{type}}&institution=  
{{ils_user_institution}}&noLoans={{noItems}}&startPos={{startPos}}
```

- 5 Save and deploy your changes to the mapping table.

For additional configurations associated with paging, refer to the description of the Bulk Definition mapping table in the *Primo Back Office Guide*.

Other Fulfillment Enhancements

- Fulfillment networks can now be configured for all institutions, not only those that work in a collaborative network (Network Zone). To configure a fulfillment network, contact your Ex Libris Professional Services/Support representative.

Resource Sharing

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

Shipping Note Element for Lending Requests

Description

The purpose of this enhancement is to store information on the resource sharing request and on the shipped item, as sent to Alma by the NCIP source system in the NCIP message's shipping note. The shipping note is used by NCIP implementers, such as OCLC Navigator, to update the library system with additional information about shipped items, which enables fulfilling a lending request. This note contains information about the resource itself, the requester, and the locations from where it is requested and is to be picked up.

A shipping note sent to Alma by the NCIP source system (such as OCLC Navigator) can be viewed in the lending request (see the procedure below).

Technical Instructions

The following roles can view shipping notes for lending requests:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

To view a shipping note for a lending request:

On the Resource Sharing Lending Request page (**Fulfillment > Resource Sharing > Lending Requests**, click **Edit** for a request), locate the **Request Note** field.

The screenshot displays a web form titled "Resource Sharing Lending Request". It has three tabs: "General Information", "Audit", and "Notes". The "General Information" tab is active, showing two main sections: "Resource Information" and "Request Attribute".

Resource Information:

- Title * 0108120540Loan
- Author Symeonidis, Andreas L.
- Author Initials
- Edition
- ISBN
- Publisher Springer/
- Publication Date 2005.
- Place of Publication
- Additional Person Name
- Source
- Series Title Number
- Call Number
- Note
- Volume
- Part
- Chapter
- Pages

Request Attribute:

- Supplied To * A partner
- Request Status Cancel reply
- External Identifier * 99
- Format Physical
- Allow Other Format
- Shipping Cost 10.00 USD
- Date Needed By 05/08/2012
- Request Note ||Shipping Note||This is the text for the shipping note.||Shipping Note||
- Requester Email

Figure 57 – Organization Unit Details Page — Send/Download Dialog Box

The shipping note can also be viewed in either of the following ways:

- On a move request that is placed on an item, as follows:
 - Search for the item on the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**) and click **Manage Fulfillment Options**. The Manage Resource Options page displays the item, and the shipping note displays in the **Note** field.

The screenshot shows the 'Manage Resource Options' page. At the top, there are buttons for 'Cancel', 'Remove Alerts', and 'Place Request'. A message states: 'The request was successfully submitted : request id = 535975250000121'. Below this, the title is '-' and the author is 'Kortick, Yoel 1971-'. Alerts include 'Citation Move Request Completed - ULINC:GEN' and 'Citation Move Request In Process - ULINC:GEN'. The page is divided into sections for 'Electronic Services', 'Digital Services', and 'Physical Services', each with a 'No records were found.' message. A table shows '1 - 1 of 1 Records' with columns for Library, Location, Call Number, No. of Items, and Available. The table entry is: Main Library, General, -, 1, 1. Below the table, there are 'Tools' and 'Actions' buttons. A detailed view of the request is shown, including 'Libraries in Australia', ID: 535975250000121, Queue: 0, Pickup Location: Resource Sharing Library, Request Date: 13/01/2014, Barcode: bc15103, Managed By Library: Main Library, Managed By Desk: 2003121251Desk, Process: Pickup From Shelf, Process Status: New, Process Date: 13/01/2014, Expiration Date: 20/01/2014, Request Type: Ship physically, External Request Id: 401849970000121, and a Note: '|Shipping Note||This is the text of the shipping note||Shipping Note|'. At the bottom, there are links for 'View Audit Trail', 'Edit', 'Cancel', 'Update Expiry', 'Mark as Missing', 'Print Slip', and 'View title in search'.

Figure 58 – Manage Resource Options Page – Shipping Note

- On the **Physical Item Editor** page, on the **Notes** tab in the **Internal Note 3** field (select **Actions > View Items** and then select **Actions > View** for an item and click the **Notes** tab).

The screenshot shows the 'Physical Item Editor' page. At the top, there are buttons for 'Cancel', 'Remove Alerts', and 'Place Request'. The page displays resource information: 'Resource description: Current history Current history (New York, N.Y. : 1941) Events Pub Co New York, N.Y. : Vol. 1, no. 1 (Sept. 1941)- [0011-3530 0011-3530]', Holding: 'Main Library: Microforms: Microfilm 06055', Barcode: '000237377330000121', and Process type: 'Acquisition'. Below this, there are tabs for 'Summary', 'General Information', 'ENUM/CHRON information', 'Notes', and 'History'. The 'Notes' tab is selected. Under 'Internal Notes', there are three fields: 'Internal note 1', 'Internal note 2', and 'Internal note 3'. The 'Internal note 3' field contains the text: '|Shipping Note||L2820079;B2820077;OQP02:PCC Cascade Circ Desk:PCC (76);Nicole Lamar|Shipping Note|'. Below this, there are 'Statistics Notes' fields for 'Statistics note 1', 'Statistics note 2', and 'Statistics note 3'.

Figure 59 – Physical Item Editor Page – Internal Note 3 Field with Shipping Note

Print Slip Report for Lending Requests

Description

The purpose of this enhancement is to provide a print slip report for resource sharing lending requests. The print slip report can be sent to a printer or to an email address, and can also be downloaded to a local machine.

Technical Instructions

The following roles can generate print slip reports for lending requests:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

To generate a print slip report for a resource sharing lending request:

- 1 Open the Resource Sharing Lending Request Tasks List page (**Fulfillment > Resource Sharing > Lending Requests**). The **Print Slip Report** button displays at the top of the page.

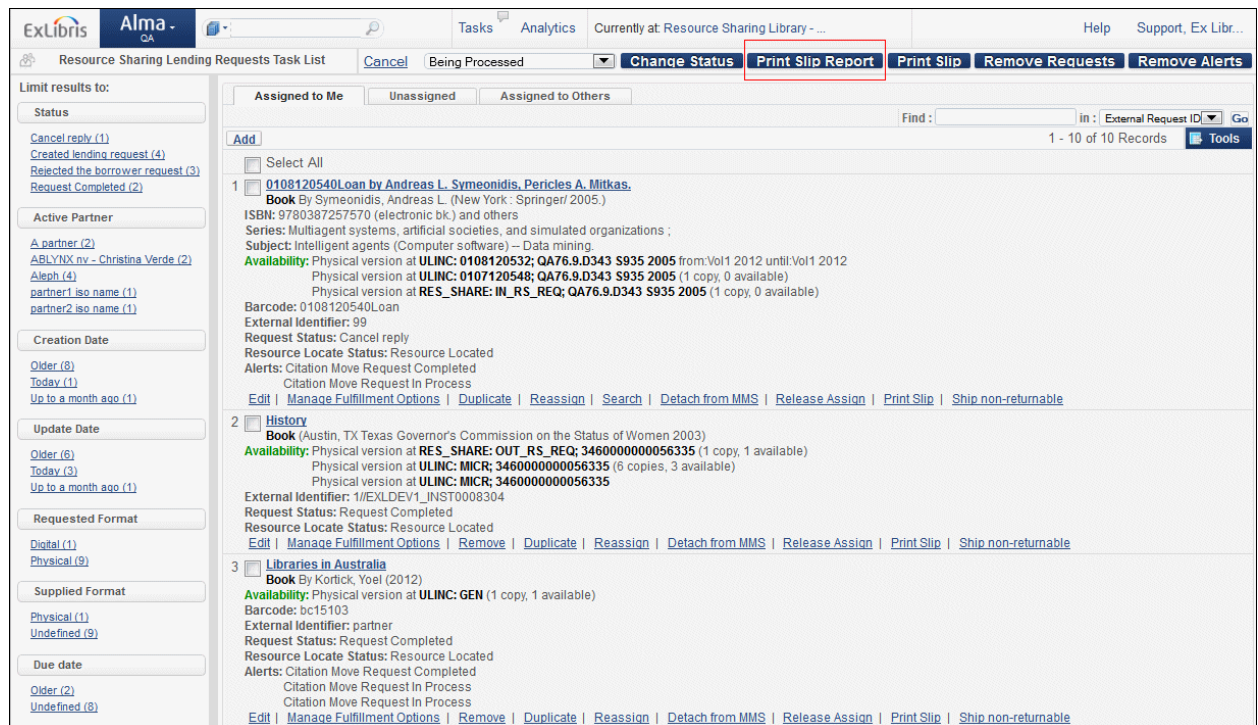


Figure 60 – Resource Sharing Lending Requests Task List Page — Print Slip Report Button

- 2 Select the check boxes of the resources for which you want to generate a print slip report and click the **Print Slip Report** button. The Print Slip Report Dialog Box opens.

The dialog box has the following fields and options:

- Choose Type: Printer User
- Format Type: Excel XML
- Printer: BURNS - matanp (dropdown menu)
- User: (text input field)

Buttons: Cancel, Download, Send

Figure 61 – Print Slip Report Dialog Box

- 3 In the **Choose type** field, select whether you want to send the print slip report to a **Printer** or a **User**.

If you select **Printer**, the **Printer** field is enabled, from which you select a printer to send the print slip report.

If you select **User**, the **User** field is enabled, from which you select a user to send the print slip report via email.
- 4 In the **Format type** field, select to send the print slip report either in **Excel** or **XML** format.
- 5 Click **Send** to send the print slip report, or optionally, click **Download** to download the print slip report to your local machine.

Configuring Mandatory Fields for Resource Sharing Request Forms

Description

The purpose of this enhancement is to enable designating specific fields as mandatory when configuring resource sharing requests. You can group several fields together so that at least one of the fields is required to be completed when submitting resource sharing requests.

Fields can be assigned as mandatory for requests made for an article and/or a book.

Note: The configured mandatory fields also appear as mandatory in the Primo resource sharing form, in reading list citation forms, and when cataloging brief records.

Technical Instructions

The following roles can configure mandatory fields for resource sharing request forms:

- Fulfillment Administrator
- General System Administrator

To configure mandatory fields for resource sharing request forms:

- 1 On the Mapping Table page for an article or a book (**Fulfillment > Fulfillment Configuration > Configuration Menu > General**, select **Article Form Mandatory Fields** or **Book Form Mandatory Fields**), click **Customize** for the fields you want to be mandatory when configuring a resource sharing request.

The screenshot shows the 'Mapping Table' configuration page for 'Main Campus'. The table name is 'ArticleFormMandatoryFields'. The table description is 'Article form Mandatory Fields (Will affect the Reading list citations fields)'. The table lists various fields with their restriction types and a 'Customize' button for each. The 'Journal Title' field is highlighted in red and has its restriction type set to 'Mandatory', with a 'Restore' button instead of 'Customize'.

Enabled	Name	Restriction Type	Updated By	Last Updated	Tools
<input checked="" type="checkbox"/>	Author Initials	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Author	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Publication Date	Optional	-	-	Customize
<input checked="" type="checkbox"/>	DOI	Optional	-	-	Customize
<input checked="" type="checkbox"/>	End Page	Optional	-	-	Customize
<input checked="" type="checkbox"/>	ISSN	Optional	-	-	Customize
<input checked="" type="checkbox"/>	PMID	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Publisher	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Additional Person Name	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Chapter	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Issue	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Journal Title	Mandatory	-	-	Restore
<input checked="" type="checkbox"/>	Note	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Pages	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Place of Publication	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Volume	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Year	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Series Title Number	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Source	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Start Page	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Article\Chapter Title	Mandatory	-	-	Customize

Figure 62 – Mapping Table — Mandatory Fields

- 2 In the **Restriction Type** column, select **Mandatory**.
To restore a field to its default value, click **Restore**.
- 3 Click **Save**. The indicated fields display as mandatory on the relevant Resource Sharing Lending Request or Resource Sharing Borrowing Request page.

To configure a group in which one field is mandatory:

- 1 On the Mapping Table page for an article or a book (**Fulfillment > Fulfillment Configuration > Configuration Menu > General**, select **Article Form Mandatory Fields** or **Book Form Mandatory Fields**), click **Customize** for the fields you want to arrange into a group.

Enabled	Name	Restriction Type	Updated By	Last Updated	Tools
<input checked="" type="checkbox"/>	Author Initials	Group 1	-	-	Restore
<input checked="" type="checkbox"/>	Author	Group 1	-	-	Restore
<input checked="" type="checkbox"/>	Publication Date	Optional	-	-	Customize
<input checked="" type="checkbox"/>	ISBN	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Part	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Publisher	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Additional Person Name	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Call Number	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Chapter	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Edition	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Note	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Pages	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Place of Publication	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Series Title Number	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Source	Optional	-	-	Customize
<input checked="" type="checkbox"/>	Title	Mandatory	-	-	Customize
<input checked="" type="checkbox"/>	Volume	Optional	-	-	Customize

Figure 63 – Mapping Table — Configuring Groups

- In the **Restriction Type** column, select **Group 1** (or another group). The indicated fields belong to the same group.
To restore a field to its default value, click **Restore**.
- Click **Save**. At least one of the indicated fields must be configured on the relevant Resource Sharing Lending Request or Resource Sharing Borrowing Request page.

Note: Fields in groups are not labeled with a red asterisk (as regular mandatory fields are), but if at least one of the fields in a group is not assigned a value, an error message displays.

You can configure up to five different groups.

Automatically Activate Locate Profile to Refine an Assigned Rota

Description

The purpose of this enhancement is to enable automatically activating a locate profile for a rota template activated by rota assignment rules. When this occurs, the Automatic Locate process runs and determines whether the rota suppliers have holdings for the required material. Suppliers that do not own the requested resource are removed from the automatically created rota.

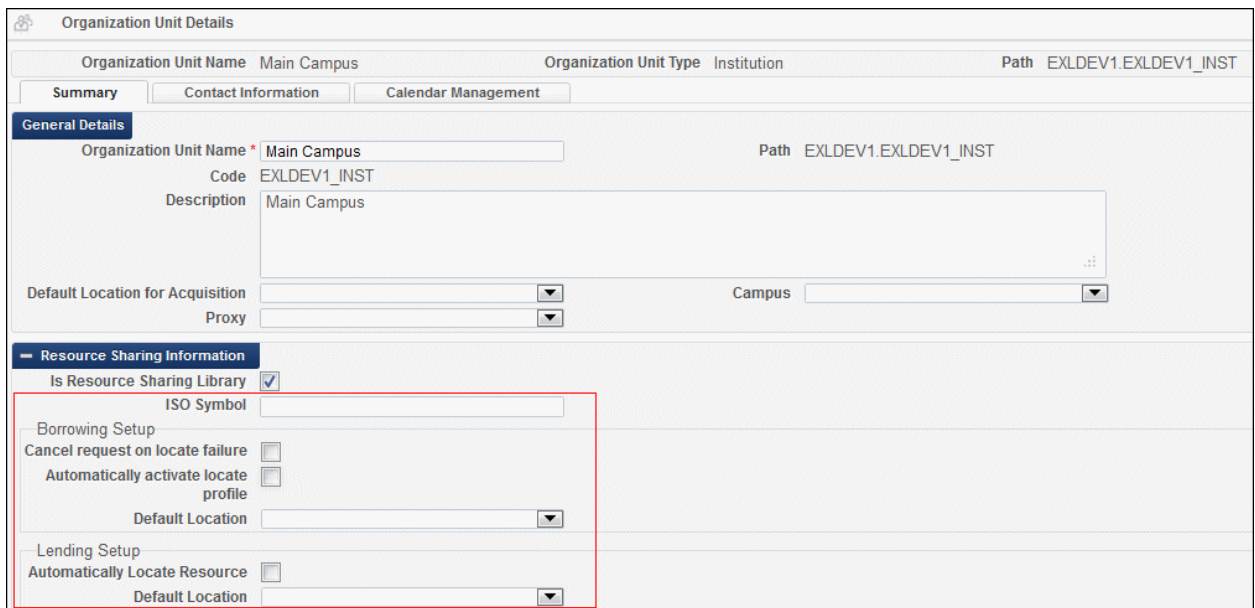
Technical Instructions

The following roles can automatically activate locate profiles for rotas:

- General System Administrator
- Fulfillment Administrator

To activate a locate profile when rota rule parameters are met:

- 1 On the Organization Unit Details page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Opening Hours**, click the **Summary** tab), select **Is Resource Sharing library**. The Resource Sharing Information fields display.



The screenshot shows the 'Organization Unit Details' page for 'Main Campus'. The 'Resource Sharing Information' section is expanded, and a red box highlights the following fields:

- Is Resource Sharing Library
- ISO Symbol
- Borrowing Setup
 - Cancel request on locate failure
 - Automatically activate locate profile
 - Default Location
- Lending Setup
 - Automatically Locate Resource
 - Default Location

Figure 64 – Organization Unit Details Page — Resource Sharing Information Fields

- 2 Select **Automatically activate locate profile**. When a rota assignment rule is met, a locate profile is assigned to the activated rota, based on the rota assignment rule.

Configuring Rules for Automatic Sending of Borrowing Requests

Description

The purpose of this enhancement is to enable configuring a rule for automatically sending borrowing requests. Any borrowing request that matched a rule for automatic sending is automatically sent to the active partner, without requiring staff intervention.

Technical Instructions

The following roles can configure rules for automatic sending of borrowing requests:

- Fulfillment Administrator
- General System Administrator

To configure automatic sending of borrowing requests:

- 1 On the Sending Borrowing Request Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Sending Borrowing Request Rules**), click **Add Rule**. The Sending Borrowing Request Rules page opens.

The screenshot shows the configuration page for Sending Borrowing Request Rules. It is divided into three main sections:

- Sending Borrowing Request Rules:** Contains fields for Name (required), Description, Created By, Updated By, Created On (13/01/2014), and Updated On (13/01/2014).
- Input Parameters:** A table with the message "No records were found." and columns for Name, Operator, Value, and an "Add Parameter" button.
- Output Parameters:** A table with columns for Name and Result. The entry "Send Request" has a Result of "True".

Figure 65 – Sending Borrowing Request Rules Page

- 2 In the **Sending Borrowing Request Rules** section, enter a name in the **Name** field.
- 3 In the **Input Parameters** section, do the following:
 - a Specify the components of the input parameter in the **Name** field.
 - b Select a value in the **Operator** field. The relevant values display in the **Value** field, if applicable.
 - c Click **Add Parameter**. The set of input parameters is added to the list of parameters for the borrowing request rule. Repeat this procedure to add all required parameters for the rule.

A set of input parameters may look like this: *Partner = British Library; User Group = Faculty*. In this case, the borrowing request rule applies only for items with the British Library partner on loan to faculty members.

- 4 In the **Output Parameters** section, select **True** to enable the borrowing request rule.
- 5 Click **Save**. The configured rule displays on the Sending Borrowing Request Rules List page.



Figure 66 –Sending Borrowing Request Rules List Page

When the configured rule parameters are met for a resource sharing borrowing request, the request is automatically sent after an automatic rota assignment is invoked.

To edit the default sending borrowing request rule:

- 1 On the Sending Borrowing Request Rules list page, under **Default Rule**, click **Edit**. The Sending Borrowing Request Rules page opens.



Figure 67 –Sending Borrowing Request Rules Page

- 2 In the **Send Request** field, modify the value, as needed.
 - True** indicates that if none of the configured rules take effect, the borrowing request is sent automatically.
 - False** indicates that if none of the configured rules take effect, the borrowing request is not sent.
- 3 Click **Save**.

Adding or Modifying Due Date for a Resource Sharing Borrowing Request Sent via NCIP

Description

The purpose of this enhancement is to enable modifying a due date contained in an NCIP Resource Sharing Borrowing Request message.

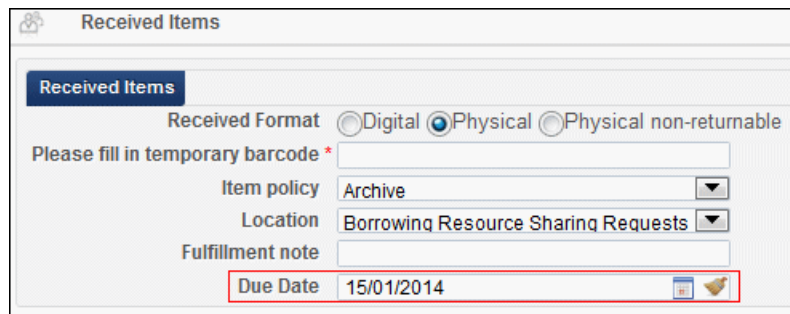
Technical Instructions

The following roles can add or modify the due date for a Resource Sharing Borrowing Request:

- Fulfillment Services Operator
- Fulfillment Services Manager

To add or modify the due date for a Resource Sharing Borrowing Request:

- 1 On the Received Items page (**Fulfillment > Resource Sharing > Borrowing Requests**, click **Receive** for a request), locate the **Due Date** field.



The screenshot shows the 'Received Items' form in a web application. The form includes several fields: 'Received Format' with radio buttons for 'Digital', 'Physical' (selected), and 'Physical non-returnable'; 'Please fill in temporary barcode *' with an empty text input; 'Item policy' with a dropdown menu set to 'Archive'; 'Location' with a dropdown menu set to 'Borrowing Resource Sharing Requests'; 'Fulfillment note' with an empty text area; and 'Due Date' with a text input containing '15/01/2014'. The 'Due Date' field is highlighted with a red border.

Figure 68 – Received Items Page — Due Date Field

The **Due Date** field contains a value if the NCIP Resource Sharing Borrowing Request message contains a due date.

Note: You can also open the Received Items page by navigating to **Fulfillment > Resource Sharing > Received Items**.

- 2 Add or modify the value of the field, as needed.
- 3 Click **Go** to receive the item.

Other Resource Sharing Enhancements

- An ISO checked-in message is sent to the borrowing library when an item is checked-in to the lending library. The message indicates that the item has been returned. The checked-in message automatically closes the request, both in the lending library and in the borrowing library.

A checked-in message is sent by doing either of the following:

- Scanning an item into Alma (**Fulfillment > Resource Requests > Scan In Items**).
- Clicking the **Checked In** link on the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**). When an item is checked-in to the lending library, a checked-in message is sent to the borrowing library, indicating

that the item has been returned. The checked-in message automatically closes the request, both in the lending library and in the borrowing library.



The screenshot shows a library system interface with a list of items. At the top left, there is a checkbox labeled "Select All". Below it, the first item is selected, indicated by a checked checkbox and the number "1". The item is titled "Journal of modern Hellenism." and is identified as an "Article (Brookline, Mass. : Hellenic College Press No. 1 (Apr. 1984)-)". Below the title, the following information is displayed: "ISSN: 0743-7749 0743-7749", "Subject: Greeks Periodicals. -- Greece Periodicals.", "External Identifier: 1/65333", "Request Status: Returned by partner", and "Resource Locate Status: Resource Located". At the bottom of the item entry, there is a row of action links: "Edit | Manage Fulfillment Options | Duplicate | Reassign | Search | Detach from MMS | Checked In | Release Assign | Print Slip |". The "Checked In" link is highlighted with a red rectangular border.

Figure 69 – Checked In Link

Note: To send a checked-in ISO message, the active partner's workflow profile must include **Checked In message** as a valid option.

Analytics

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

Addition of Due Date Fields to the Resource Sharing Borrowing and Lending Requests Subject Areas

Description

The purpose of this enhancement is to provide information regarding due dates as part of the Borrowing and Lending Requests subject areas. Until this release, the Due Date field was only available in the Lending Requests subject area, under the Lending Request Details fact. In this release, the Due Date field has been added to the Borrowing Requests subject area under the Borrowing Request Details fact. In addition, the Due Date dimension has been added under the Borrowing and Lending Requests subject areas in order to add the ability to create flexible filters for the due date.

Technical Instructions

The Design Analytics role can access this enhancement.

To access the Due Date field and dimensions in Alma Analytics:

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

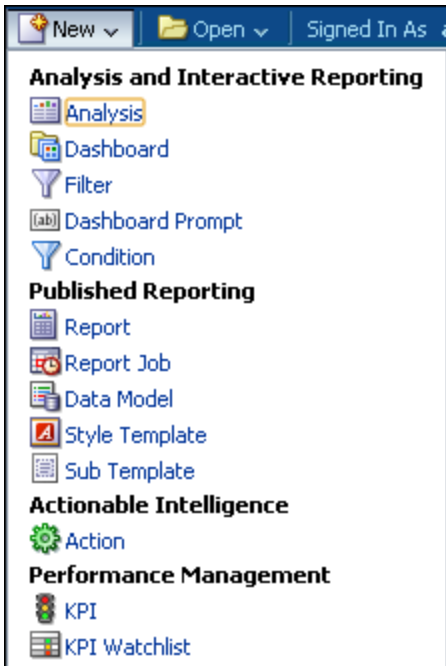


Figure 70 – New > Analysis Option

The Select Subject Area options are displayed.



Figure 71 – Select Subject Area

3 Select **Borrowing Requests** or **Lending Requests**.

The Due Date dimension is available under the Borrowing Requests and Lending Requests subject areas:

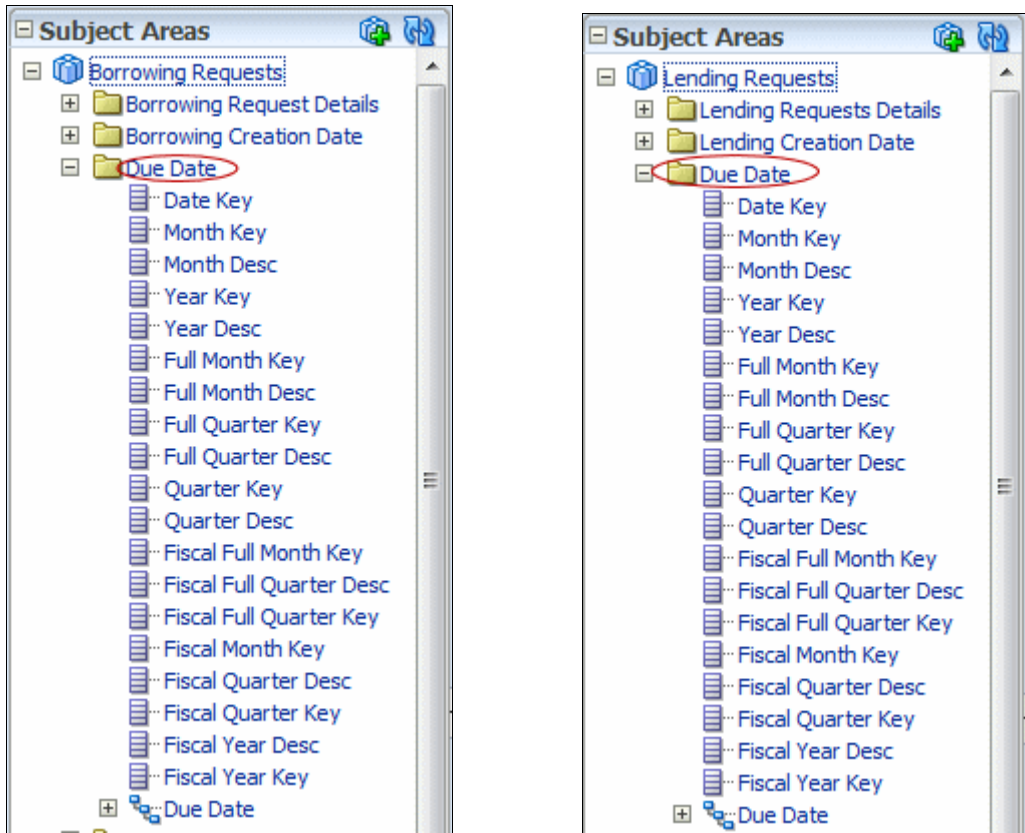


Figure 72 – Borrowing and Lending Requests Due Date Dimension

The Due Date field is available under the Borrowing Request Details fact:

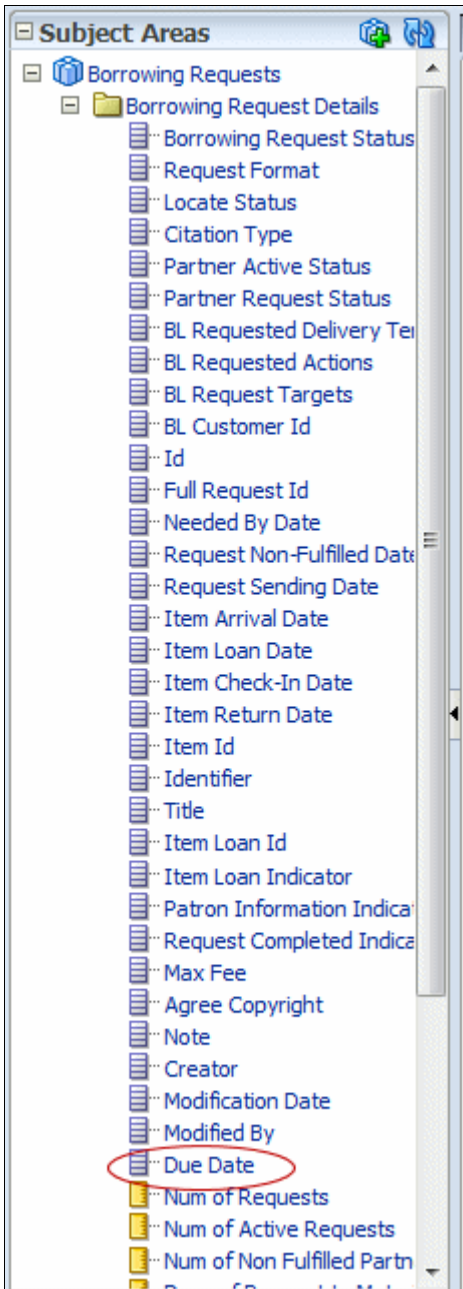


Figure 73 – Borrowing Request Details Due Date

The following is an example of a report using the Due Date dimension:

Compound Layout




Title  

Table  

Title	Author	Library Name	Date Key
Dynamics of international relations	Ernst B. Haas; Allen S. Whiting	Resource Sharing Library	3/3/2014
Forbidden language : English learners and restrictive language policies	Patricia C. Gandara; Megan Hopkins;	Resource Sharing Library	2/19/2014
Household and community in the Mesoamerican past	Richard R. Wilk; Wendy Ashmore;	Resource Sharing Library	2/19/2014
International handbook of multigenerational legacies of trauma	Yael Danieli;	Resource Sharing Library	3/5/2014
International handbook of traumatic stress syndromes	John P. Wilson; Beverley Raphael;	Resource Sharing Library	2/20/2014
Mandarin ducks and butterflies : popular fiction in early twentieth-century Chinese cities	E. Perry Link	Resource Sharing Library	2/19/2014
Patterns in a chromatic field : for cello & piano	Morton Feldman	Resource Sharing Library	2/18/2014
The Zen arts : an anthropological study of the culture of aesthetic form in Japan	Rupert A. Cox	Resource Sharing Library	3/9/2014
What do we know about war?	John A. Vasquez;	Resource Sharing Library	2/19/2014

Figure 74 –Due Date Report

Integrations with External Systems

The following sections describe the functions provided for integrations with external systems in the February 2014 release of Alma.

Enhancement to Libraries Australia Upload

Description

The purpose of this enhancement is to provide improvements to the Alma export to Libraries Australia (LA). With the February release, the following changes have been implemented:

- The 001 in the export file contains the LA number pulled from the 019.
- There is only one 035 field that contains the MMS ID in \$a except for instances where (OCoLC) is specified in the 035.
- The 090 and 091 fields and \$9s are omitted.
- Content from the 852 field is used to build the 984 in the export file.
 - \$a contains the NUC code.
 - There can be only one \$a per 984 field.
 - There can be repeating \$c and \$d entries (see the example below).

```
<datafield tag="984" ind1=" " ind2=" ">
  <subfield code="a">NUC_TEST</subfield>
  <subfield code="c">MICROFILM 3502-3508 </subfield>
  <subfield code="d">Vol. 1 (1967)-v. 7 (1974)</subfield>
</datafield>
<datafield tag="984" ind1=" " ind2=" ">
  <subfield code="a">SUA-R</subfield>
  <subfield code="c">JJ73397-73400 </subfield>
  <subfield code="d">Vol. 8 (1974)-v. 11 (1978)</subfield>
  <subfield code="c">375.905 H674 </subfield>
  <subfield code="d">Vol. 1, no. 1-v. 37, no. 4 (Nov. 1967-Aug. 2004)</subfield>
</datafield>
```

For additional information, refer to the **Publishing to Libraries Australia** section of the *Alma Integrations with External Systems* guide or the Alma online help.

Other Integrations with External Systems Enhancements

- The error reporting of the external system user import/synchronization has been improved. All rejected users now appear in one list, with an indication for each user of the reason for the rejection. In addition, the error messages have been enhanced and the name of the XML file containing the problematic user data is now indicated.

Collaborative Networks and Multi-Campus Institutions

The following section describes Alma enhancements provided for collaborative networks and multi-campus institutions in the February 2014 release.

Library/Campus Proxy Options Added

Description

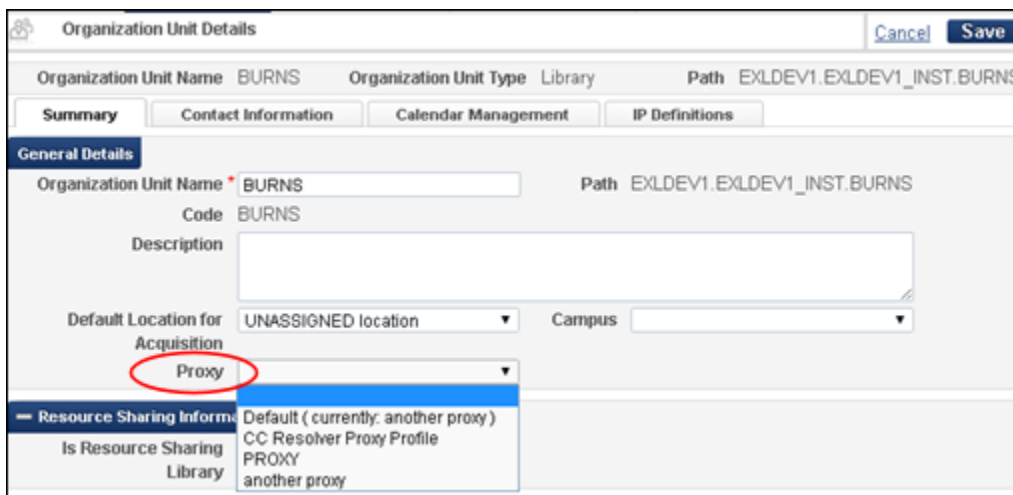
The purpose of this enhancement is to provide the ability to assign a default proxy at the campus or library level. With this change, the Alma proxy processing logic has been adapted (refer to the online help for more information).

Technical Instructions

The General System Administrator role can configure this capability,

To configure a default proxy for a library:

- 1 From the Libraries tab on the List of Libraries page (**Administration > General Configuration > Configuration Menu > Libraries > Add a Library or Edit Library Information**), select **Actions > Edit** for the library (Organization Unit Name) whose proxy you want to configure. The Organization Unit Details page opens.
- 2 From the **Proxy** drop-down list, select the proxy that you want to be the default used for resolving electronic resources for the library configuration that you have opened.



The screenshot shows the 'Organization Unit Details' form for a library named 'BURNS'. The form has several tabs: 'Summary', 'Contact Information', 'Calendar Management', and 'IP Definitions'. The 'General Details' tab is active. Fields include 'Organization Unit Name' (BURNS), 'Code' (BURNS), 'Description' (empty), 'Default Location for Acquisition' (UNASSIGNED location), and 'Campus' (empty). A 'Proxy' dropdown menu is highlighted with a red circle, and its options are visible: 'Default (currently: another proxy)', 'CC Resolver Proxy Profile', 'PROXY', and 'another proxy'. The 'Is Resource Sharing Library' checkbox is also visible.

Figure 75 - Proxy Configuration Option for a Library

The same proxy options are also available when you **Add a Library** from the Libraries tab.

The proxy options that display in the drop-down list for this library were previously defined in your Integration Profiles (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**, Resolver Proxy integration type).



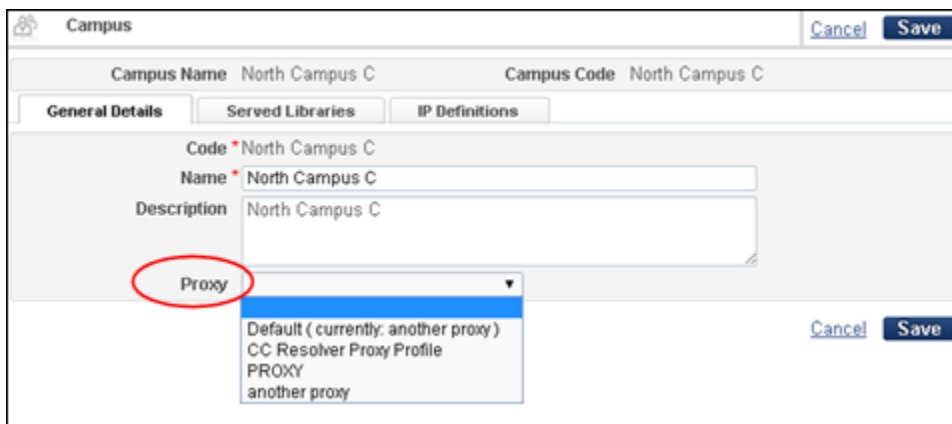
Name	Code	Description	Integration Type	Updated By	Status Date
another proxy	PROXY_DEFAULT	-	Resolver Proxy	admin1	07/01/2014
CC Resolver Proxy Profile	PROXY	CC Resolver Proxy Profile	Resolver Proxy	exl_impl	07/01/2014
PROXY	PROXY	-	Resolver Proxy	admin1	07/01/2014

Figure 76 - Integration Profiles

3 Click **Save**.

To configure a default proxy for a campus:

- 1 From the Campus List page (**Administration > General Configuration > Configuration Menu > Libraries > Define Campuses**), select **Actions > Edit** for the campus whose proxy you want to configure. The Campus page opens.
- 2 From the **Proxy** drop-down list, select the proxy that you want to be the default used for resolving electronic resources for the campus configuration that you have opened.



Campus configuration form for North Campus C. The Proxy dropdown menu is open, showing the following options: Default (currently: another proxy), CC Resolver Proxy Profile, PROXY, and another proxy.

Figure 77 - Proxy Configuration Option for a Campus

The same proxy options are also available when you click **Add Campus** on the Campus List page.

The proxy options that display in the drop-down list for this campus were previously defined in your Integration Profiles (**Administration > General Configuration >**

Configuration Menu > External Systems > Integration Profiles, Resolver Proxy integration type).



Name	Code	Description	Integration Type	Updated By	Status Date
another proxy	PROXY_DEFAULT	-	Resolver Proxy	admin1	07/01/2014
CC Resolver Proxy Profile	PROXY	CC Resolver Proxy Profile	Resolver Proxy	exl_impl	07/01/2014
PROXY	PROXY	-	Resolver Proxy	admin1	07/01/2014

Figure 78 - Integration Profiles

3 Click Save.

Central Publishing to Primo

Description

The purpose of this enhancement is to enable the NZ institution to run a publishing job that publishes the following information to Primo:

- All bibliographic records that are managed in the network
- All bibliographic records that one or more members are linked to
- Each member's local bibliographic records (NEW)

The ability to run the job from the NZ institution helps prevent duplication of records that may occur in Primo if each institution in the network ran publishing separately.

Technical Instructions

The following roles can access this enhancement:

- Repository Administrator
- General System Administrator

To publish a new member's local records:

- 1 On the Resource Management Configuration page in Alma (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** in the **Record Export** section. The Publishing Profiles page opens.

Active	Name	Description	Last Run	Actions
<input checked="" type="checkbox"/>	Publish bibliographic records from Network Zone to Primo	Publish bibliographic record from Network Zone to Primo	-	Actions
<input checked="" type="checkbox"/>	Publish bibliographic records to OCLC	Synchronize bibliographic records with OCLC	17/07/2013	Actions
<input checked="" type="checkbox"/>	Publish bibliographic records to Primo	Setup the parameters for publishing bibliographic records to Primo - this is a test	26/06/2013	Actions
<input checked="" type="checkbox"/>	Publish electronic records to Google Scholar	Publish electronic records to Google Scholar	04/12/2013	Actions
<input checked="" type="checkbox"/>	Publish electronic records to Primo Central	Publish electronic records to Primo Central	-	Actions

Figure 79 – Publishing Profiles Page

- In the row that contains the **Publish bibliographic records from Network Zone to Primo** profile, select **Actions > Edit**. The Publishing Profile Details page opens for the selected export type.

Publishing Profile Details
[Cancel](#) **Save**

Profile Details

Profile name *

Profile description

Status Active Inactive

Scheduling

Run full publishing for entire network

Submission Format

FTP configuration **Sub-directory**

Content Options

Related records information enrichment

Members

Tools

Member Code	Member Name	Active	Run Full Publishing
01CE_CONC	Concordia University	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01CE_EWU	Eastern Washington University	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01CE_EVSC	Evergreen State College	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Tools

[Cancel](#) **Save**

Figure 80 – Publishing Profiles Details Page

- In the **Members** section, select the **Run Full Publishing** check box in the new member's row.

Note: The **Run full publishing for entire network** check box must not be selected in the **Profile Details** section.

- 4 Click **Save**.
- 5 Run the publishing job.

Note: After the job executes, the system clears the **Run Full Publishing** column so that shared records and incremental updates for all members are included the next time the job runs as scheduled.

PDA Load Profiles - Link Bibliographic Records to the Network Zone

Description

This enhancement provides the ability to use an institution-level PDA program in the context of the Collaborative Network. Candidate bibliographic records can now be imported from the Institution Zone and uploaded or linked to the Network Zone bibliographic records.

Technical Instructions

The following roles can access this feature:

- Purchasing Operator
- Purchasing Manager

To set a PDA load profile to use records linked to the Network Zone:

- 1 On the Patron Driven Acquisitions (PDA) List page (**Acquisitions > Advanced Tools > Patron Driven Acquisitions (PDA)**), select one of the following:
 - the **Add PDA** button to create a new profile with records linked to the Network Zone
 - **Actions > Duplicate** in the row of the existing profile to which you want to add this feature

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

Figure 81 - Patron Driven Acquisition (PDA) List Page

The PDA Details page opens.

Summary

Use Network Zone

Name* PDA4a Code* PDA4a

Status* Draft Vendor* Blackwell

Start Date* 09/01/2012 End Date

Access 0 Budget

Threshold Threshold US

License Contact

Figure 82 - Check Box for Linking Records to the Network Zone

- 2 Enter information in the required fields.
- 3 To link loaded records to the Network Zone, select the **Use Network Zone** check box.
- 4 Click the **Save** button to save your edits (**Cancel** to discard the change).

Alma Interface Updates

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

Work Order Terminology

The purpose of this enhancement is to update labels associated with work orders so that staff users can better differentiate between work orders and requests. The following changes were made to labels in the following areas:

- Physical item repository search results:
 - **Managed by Department** facet changed to **In Process**.
 - The Process type for each record in the list displays the work order type and status instead of **Managed by Department**.
- Physical Item Editor – The Process type for each record in the list displays the work order type and status instead of **Managed by Department**.
- Request Monitor:
 - The **Work Order** label has changed to **In Process**.
 - The **Edit Request** button is now called **Edit** for work orders.
- Manage Department Items:
 - The link to the Manage Department Items page is now called **Manage In Process Items**.

Creator Info Icon Now Displayed in the Created By Column

Description

The purpose of this enhancement is to display the Creator Info icon in the Created By column in various pages of Alma, such as in the Public Sets and All Sets tabs of the Manage Sets page and the Notes tab of various pages, such as the User Details page.

Technical Instructions

The following procedure illustrates an example of the Creator Info icon.

To display the Creator Info icon:

- 1 On the Manage Sets page (**Resource Management > Manage Sets**), click the **Public Sets** or **All Sets** tabs. The Creator Info icon is displayed next to the name of the creator in the Created By column.

Active	Name	Type	Contents Type	Created by	Creation Date	
✓	Q1 items for missing	Logical	Physical items	exl_support	25/06/2013 07:19:34 AM IDT	Actions
✓	BibHeadingWithMultipleMatches	Itemized	All Titles	System	03/01/2012 04:26:32 AM IST	Actions
✓	CC All Titles Set 1	Itemized	All Titles	admin1	09/08/2013 07:12:41 PM IDT	Actions

Figure 83 – Creator Info Icon

- 2 Click the icon to display creator information.

Name Lebowitz, Joe
Primary identifier MUBLebow
Home Address 1200 Main Street
Pleasantville, ND
Office Address 500 Spruce Street
Pleasantville, ND
Email JoeL1234@gmail.com
Telephone 718-765-9876

Figure 84 – Creator Information

Maintenance Message

Description

The purpose of this enhancement is to display a message on the Alma home page that indicates the dates on which the system is undergoing maintenance.

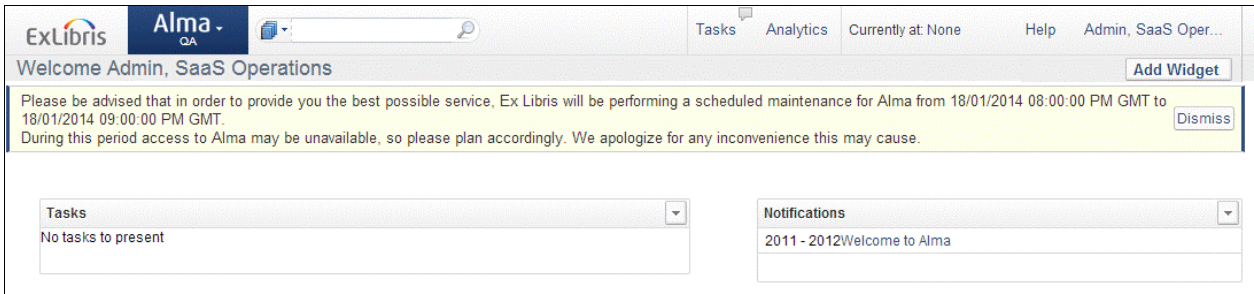


Figure 85 –Maintenance Message

The message is displayed until the date indicated in the message. Click **Dismiss** to prevent the message from being displayed further.

Alma APIs

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

Alma RESTful APIs

With the February release, a new RESTful API is available for holdings:

GET/bibs/{mms_id}/holdings. This API returns a list of holdings records for a given MMS (bibliographic record).

For detailed information on this RESTful API, see:

http://support.exlibris.co.il/alma/restws/GET_bibs_mms_id_holdings.wadl.html

Known Issues

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

For details, you can read the following:

https://blogs.oracle.com/proactivesupportEPM/entry/obiee_problems_with_chrome_update

https://blogs.oracle.com/proactivesupportEPM/entry/update_to_obiee_chrome_30

Ex Libris is working on updating the OBI version in order to fix this issue. However, this will take time and the fix is expected only in Q1 2014 (still to be finalized). In the meantime, use other supported browsers.