

Alma July 2014 release:  
**Celebrating Two Years  
of Alma!**



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# About the Alma Release Notes

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

These release notes include:

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

# Alma July 2014 Release Highlights

## Acquisitions

- Vendor-Related Enhancements

Information entered and stored on the vendor-related pages has been enhanced to include Vendor Type, Standalone Portfolios in the Inventory Tab, Statistics Note, and User Contact Information Pop-Up.

- Pause PDA

In the event that funds for a PDA program are entirely expended, you can now suppress the PDA publishing until the program's funds are replenished.

## Resource Management

- Enrich General Publishing Records with Electronic Inventory Information

As a continuation of the general profile enhancements for publishing released in May, this enhancement allows for enriching general publishing records with electronic inventory information for the purpose of integrating with third-party platforms.

- Configure Email Notifications for Publishing Profiles

In all scheduled publishing profiles it is now possible to specify the users and email addresses that will receive email notifications when the publishing profile has completed.

- Send to Ex Libris Action Added to the Institution Tab Search Results

The **Send to Ex Libris** action which provides the ability to open a Salesforce case related to an electronic resource content is now available in the Institution tab search results for electronic resources (previously this was only available in the Community tab).

- Remove Temporary Location Added to Batch Job Processing

The **Change physical items** batch job parameters have been enhanced to include a new option—**Remove temporary item indication**—that allows for updating a set of items with the indication that the items are no longer in a temporary location.

## Fulfillment

- **Select Booking or Hold Requests When Configuring Display Logic Rules**

This feature enables selecting either **Booking** or **Hold** requests when configuring display logic rules.
- **New Option in Terms of Use Actions Menu**

This great new feature enables viewing the fulfillment rules that are associated with a terms of use (TOU).

## Resource Sharing

- **Registering Fees for a Borrowing Request When Receiving an Item**

This feature enables you to automatically create a resource sharing fee for receiving an item. The fee is automatically charged at receive time, as per the defined policies, which are configured in the Borrowing Requests terms of use (TOU).
- **Lender Manages a Renewal Request**

It is now possible to approve or reject a renewal request submitted by a borrower (based on configuring automatic and/or manual renewal in the fulfillment configuration).

## Analytics

- **Enhancements to the PO Line Dimension**

Several important additions have been implemented for the PO Line, which is a shared dimension in a number of subject areas (such as Fund Expenditure, Physical Items, E-inventory and more). This means that it will now be possible to create item-level reports with related amounts (such as a report of new items by receiving date with their associated costs).

## Primo

- **Publish Holdings Information to Primo**

Published records can be enriched with additional holdings information, which can be mapped to a MARC field in the published bibliographic record.

## Collaborative Networks and Multicampus Institutions

- Central Publishing to Primo – Republishing Sets  
Alma has added a number of Primo publishing jobs for customers who are using centralized publishing from the Network Zone.
- Campus Level Z39.50 Server Connection  
With the Alma July release, it is now possible to define a Z39.50 client connection with Alma that supports filtering by campus.
- Global Changes on Local Extensions for NZ-Linked Records  
Alma has been enhanced to globally update local fields of NZ-linked records to enable the maintenance of local extensions.

## Alma Interface Updates

- Last Item Edited Indicator  
After editing an item in a list and returning to the list, the page automatically scrolls to the item that you were working on and a bar is displayed next to the item.

# Data Services

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

## New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period 01-June-2014 through 29-June-2014:

- Oxford University Press African American Studies Center
- SpringerLink Books Mathematics and Statistics Without Lecture Notes 2014
- SpringerLink Books Physics and Astronomy Without Lecture Notes 2014
- SpringerLink Books Lecture Notes in Computer Science 2014
- SpringerLink Books Lecture Notes in Mathematics 2014
- SpringerLink Books Lecture Notes in Physics 2014
- SpringerLink Books Medicine 2014
- SpringerLink Books Professional and Applied Computing 2014
- Morgan Claypool Colloquium Series
- Morgan Claypool Synthesis Lectures
- Royal Society of Chemistry eBook Collection 2014
- Taylor & Francis New Launch Free Trial 2014

## New External Resources That Are Open for Searching

No new external resources were added for the July release.

# Alma Show Me How and Videos

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

## Alma Show Me How – July

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

- Available from the Show Me How menu:
  - Pause PDA Program
  - Remove Temporary Item Indication
  - ISO ILL (Resource Sharing): Configure Renewal by Lender
- Pop-ups:
  - New: Navigate to Fulfillment Rules from TOU
  - New: Manual Orders – Create Multiple Portfolios
  - New: “Send to Ex Libris” for Local Collections

## Alma Videos – July

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

- Remove Temporary Item Location Indicator
- ISO ILL (Resource Sharing): Request Renewal
- Pause PDA Program
- Navigate to Fulfillment Rules from Terms of Use
- Manual Orders: Create Multiple Portfolios
- "Send to Ex Libris" for Local Collections
- Analytics: PO Line Dimension Enhancements
- Analytics: Date Fields Improvements
- Allow Changes to Local Extensions of Global Records

# 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 June 2014 release:

- The structure of the Alma online help has been revised. The items that were previously located under Additional Resources are now located in the following new sections accessible from the Table of Contents: What's New, Getting Started, "How To" & Ask the Expert, Working with APIs, and Glossary.
- Configuring RSS – This section has been enhanced to provide an overview of the new book list workflow, an in-depth explanation of the RSS Discovery URL and Feed URL and an illustrative example of the feed job processing (under Resource Management > Configuring Resource Management > Record Export).
- E-Collection Configuration Guide – A new guide, detailing the configuration required for various e-collections, will be available (under Cross Product > Technical Documentation > Target/E-Collection Configuration and accessible via the Alma online help).

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

# Particular Issues to Note

The following issues should be noted:

- Due to issues caused by the resetting of the barcode generation sequence, this functionality has been temporarily disabled (**Resource Management > Resource Configuration > Configuration Menu > General > Barcode Generation**). The functionality will be restored with the August release.
- As part of the August release, it will be possible to add multiple instructors for a course. When the course information is published to Primo, the CNO element in the XML will contain multiple subfield g entries (the subfield that holds information on course instructors). Your Primo normalization rules will probably normalize all the multiple subfield g entries as required. For example, this would be the case if your normalization rules follow the normalization rule sample provided in the *Primo Interoperability Guide*. However, it is strongly recommended that you check your Primo normalization rules in advance of the Alma August release to ensure that they are suitable to handle the \$\$g field.

# Acquisitions

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

## Vendor-Related Enhancements

### Description

Information entered and stored on the vendor-related pages has been enhanced to include the following features:

- Vendor Type
- Standalone Portfolios in the Inventory Tab
- Statistics Note
- User Contact Information Pop-Up

### Vendor Type

On the Search Vendors page, a new column, **Vendor Type**, displays the type of product or service offered by the vendor (for example, Material Supplier or Access Provider). A **Vendor Type** filter accompanies this new classification.

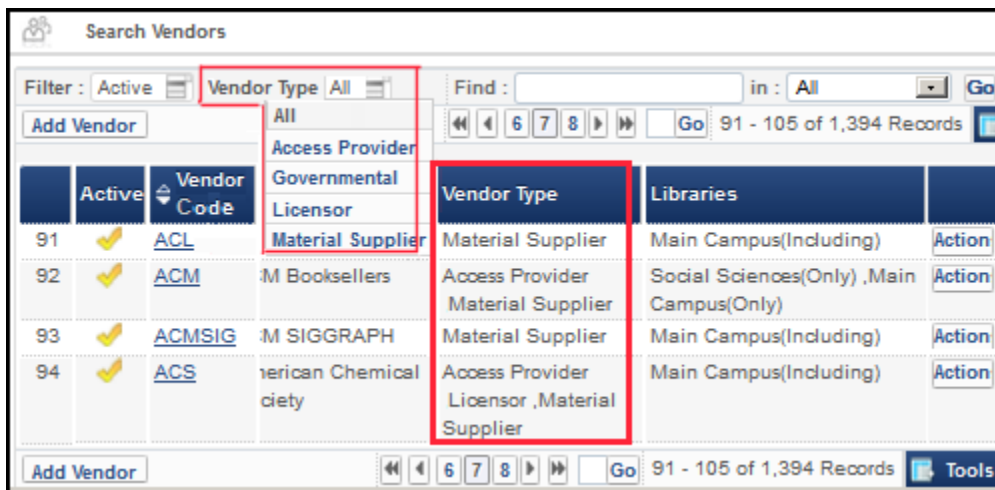


Figure 1 - Vendor Type Field and Filter

## Standalone Portfolios in the Inventory Tab

In the Inventory tab of the Vendor Interface Details page, standalone portfolios are now listed under Active Resources, in addition to the already-listed electronic collections from previous Alma releases.

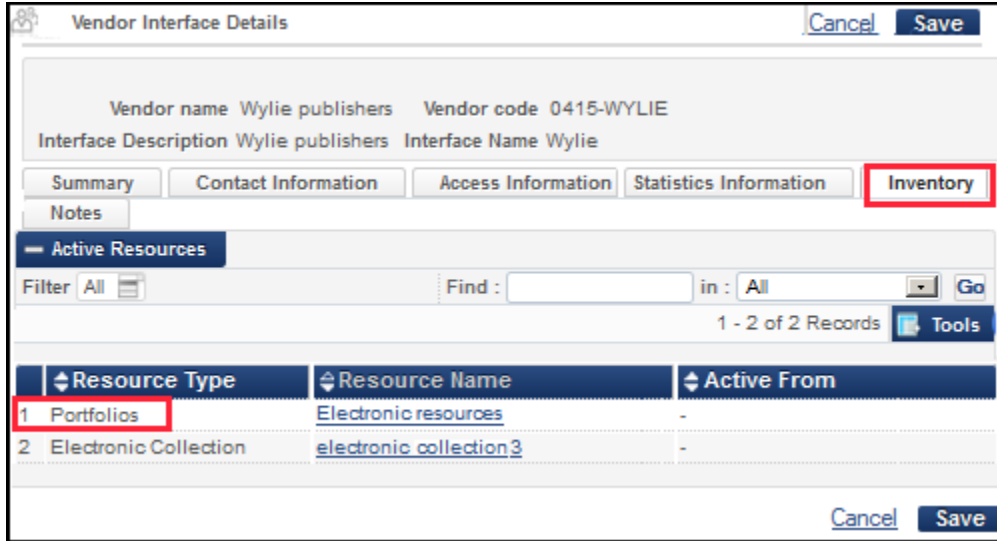


Figure 2 - Portfolios Listed as Active Resources

The Resource Name for both portfolios and electronic collections links to the edit page for each resource.

## Statistics Note Field

In the Statistics tab for the interface, a new field, **Statistics Note**, has been added below the Linking Note field. This field is for usage-related statistics information.

The screenshot shows the 'Vendor Interface Details' page with the 'Statistics Information' tab selected. The page contains several sections:

- Vendor Information:** Vendor name 'Wylie publishers', Vendor code '0415-WYLIE', Interface Description 'aldfsd', and Interface Name 'kjifaskd'.
- Navigation:** Tabs for 'Administrative Information', 'Access Information', 'Statistics Information' (highlighted), and 'Inventory'.
- Interface General Details:**
  - Security Attributes:** Fields for 'User ID', 'User Password', and 'User Password Note'.
  - Usage Statistics:**
    - 'Usage Stats Available' checkbox (unchecked).
    - 'Usage Stats Delivery Method' dropdown set to 'Email'.
    - 'Stats Format' dropdown menu open, showing options: ASCII, CSV, Delimited, Excel, **Html** (selected), and Other.
    - 'Usage Stats Frequency' dropdown set to 'Monthly'.
    - 'Usage Stats Online Location' and 'Usage Stats Locally Stored' fields.
    - 'Usage Stats Delivery Address' field.
    - 'Linking Note' text area.
    - 'Statistics Note' text area (highlighted with a red box).**

Buttons for 'Cancel' and 'Save' are located at the top right and bottom right of the page.

Figure 3 - New Statistics Note Field on Vendor Interface Details Page

### ***User Contact Information Pop-Up***

Alma provides electronic business cards with links to email activation for contacts that appear throughout the vendor interface.

Where a contact icon appears beside a name on any page, you can click the user's name and activate an email correspondence.

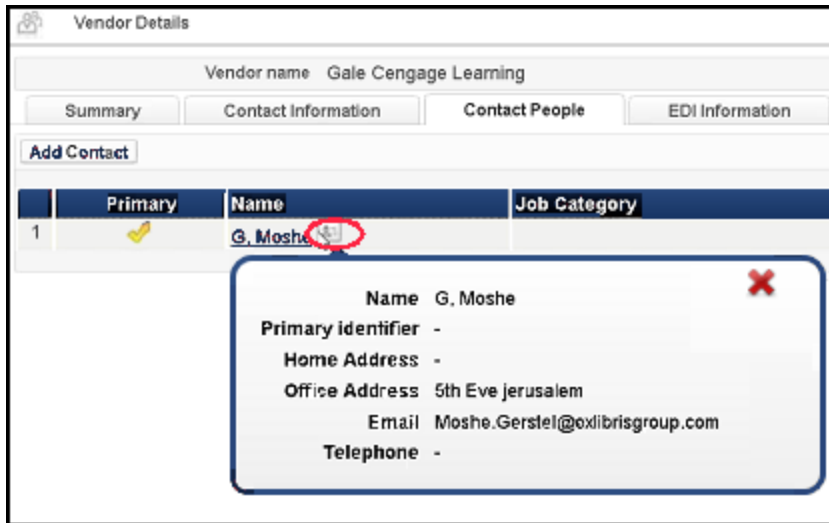


Figure 4 - Contact Pop-Up Card with Email Link

This improvement is part of a system-wide implementation to make communication among Alma users more seamless.

## Align PO Line Rollover with Foreign Currency

When an order or invoice currency differs from the fund currency, the exchange rate on the date of the transaction is used.

For example, when making an order in EUR with the fund's currency in USD, an exchange is made when creating the encumbrance transaction from the order's currency (EUR) to the fund's currency (USD). The encumbrance transaction's exchange rate date should be the order date (when the PO line is created).

When a rollover is executed on the order, the exchange rate is recalculated according to the most recent currency rate of exchange.

## Multiple URLs in Manual PO Lines

### Description

When you manually order an electronic book or journal, the bibliographic record used to create the corresponding standalone portfolio may have multiple URLs (due to the bibliographic record having multiple 856 \$u fields). Prior to this release, standalone portfolios were created for each URL in the bibliographic record. It is now possible to disable the automatic creation of the multiple portfolios and choose the URLs for which you want a standalone portfolio to be created.

## Technical Instructions

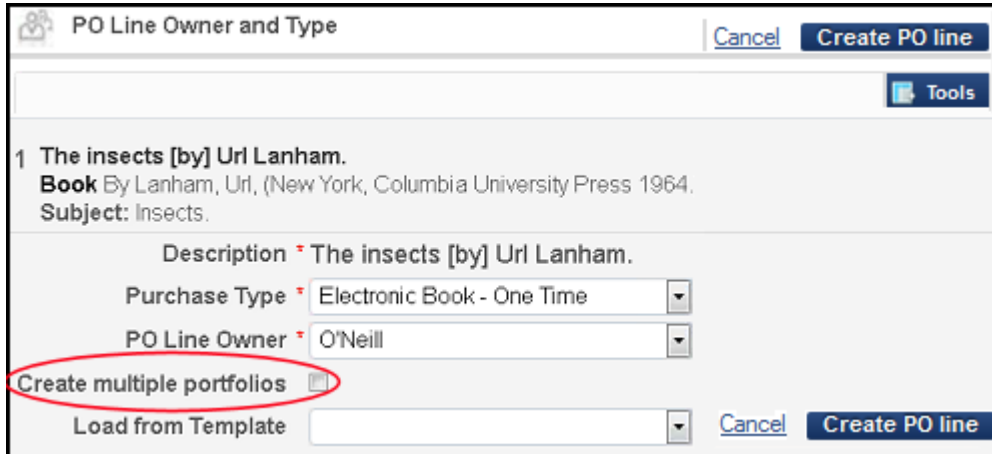
The following roles can manage multiple portfolio URLs:

- Purchasing Operator
- Purchasing Manager

### To manage multiple URLs in PO lines:

- 1 Begin creating a purchase order for a portfolio. (See **Acquisitions > Purchasing** in the online help for more information.)

On the PO Line Owner and Type page, if the resource has multiple URLs for multiple portfolios, the following check box, **Create multiple portfolios**, appears as a field (see below).



The screenshot shows a web form titled "PO Line Owner and Type". At the top right, there are "Cancel" and "Create PO line" buttons. Below the title bar is a "Tools" button. The main content area displays the following information:

- 1 The insects [by] Uri Lanham.
- Book** By Lanham, Uri, (New York, Columbia University Press 1964.
- Subject:** Insects.

Below this information are several fields:

- Description \* The insects [by] Uri Lanham.
- Purchase Type \* Electronic Book - One Time (dropdown menu)
- PO Line Owner \* O'Neill (dropdown menu)
- Create multiple portfolios**  (checkbox, highlighted with a red circle)
- Load from Template (dropdown menu)

At the bottom right, there are "Cancel" and "Create PO line" buttons.

Figure 5 - Create multiple portfolios check box

- 2 To view available URLs for the portfolios, click the **Create multiple portfolios** check box. The page reloads with a list of available URLs for the portfolio (see below).

PO Line Owner and Type

Cancel Create PO line

Tools

1 The insects [by] Uri Lanham.  
**Book** By Lanham, Uri, (New York, Columbia University Press 1964.  
**Subject:** Insects.

Description \* The insects [by] Uri Lanham.  
Purchase Type \* Electronic Book - One Time  
PO Line Owner \* O'Neill

Create multiple portfolios   
Load from Template

Portfolios list

	URL
1	<input checked="" type="checkbox"/> <a href="http://forum.lametayel.co.il/forum_msg/goto-3342420">http://forum.lametayel.co.il/forum_msg/goto-3342420</a>
2	<input checked="" type="checkbox"/> <a href="http://www.daka90.co.il/Pages/Search/SearchResult.aspx?VHlwZXN9MyZDaXRpZXN9NDY3MDUmRGF0ZXN9MDIIMmYw%3d%3d">http://www.daka90.co.il/Pages/Search/SearchResult.aspx?VHlwZXN9MyZDaXRpZXN9NDY3MDUmRGF0ZXN9MDIIMmYw%3d%3d</a>
3	<input type="checkbox"/> <a href="https://qa.alma.exlibrisgroup.com/rep/action/pageAction.search.physical_ie_results.xml">https://qa.alma.exlibrisgroup.com/rep/action/pageAction.search.physical_ie_results.xml</a>

Cancel Create PO line

Figure 6 - List of Portfolio URLs

- To limit access to the portfolio to one URL, select the URL you want to use. To select two or more, or the entire group, select the check boxes accordingly.

**Note:** If you do not select the check box on the top half of the page, and if multiple URLs exist but you do not associate one with the portfolio, Alma selects one of the URLs for your institution to use each time your patrons access the portfolio.

## Pause PDA

### Description

In the event that funds for a PDA program are entirely expended, you can now suppress the PDA publishing until the program's funds are replenished.

## Technical Instructions

The following roles can pause/restore PDA publishing:

- Purchasing Operator
- Purchasing Manager

### To pause PDA publishing:

- 1 On the Patron Driven Acquisitions (PDA) List page (**Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)**), select **Actions > Pause**.

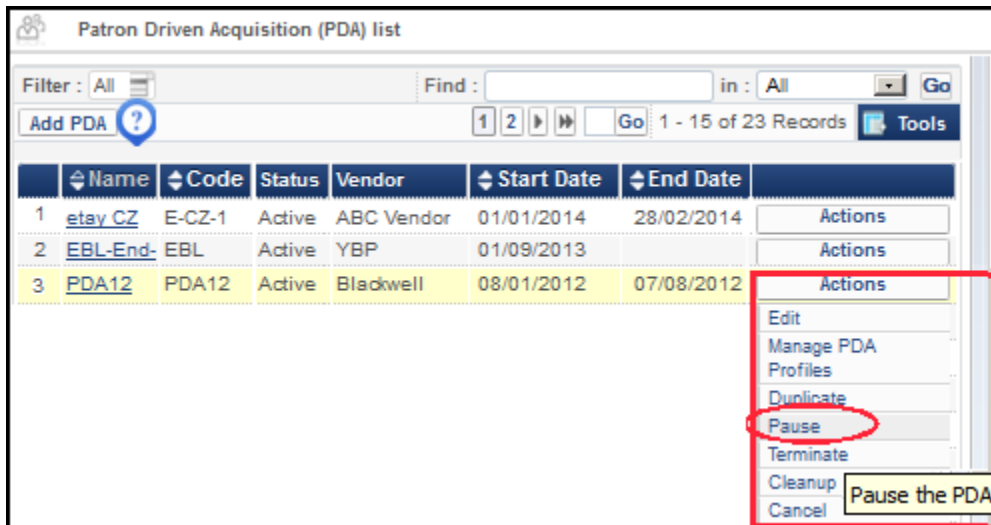


Figure 7 - PDA Pause Action

The following confirmation box opens.

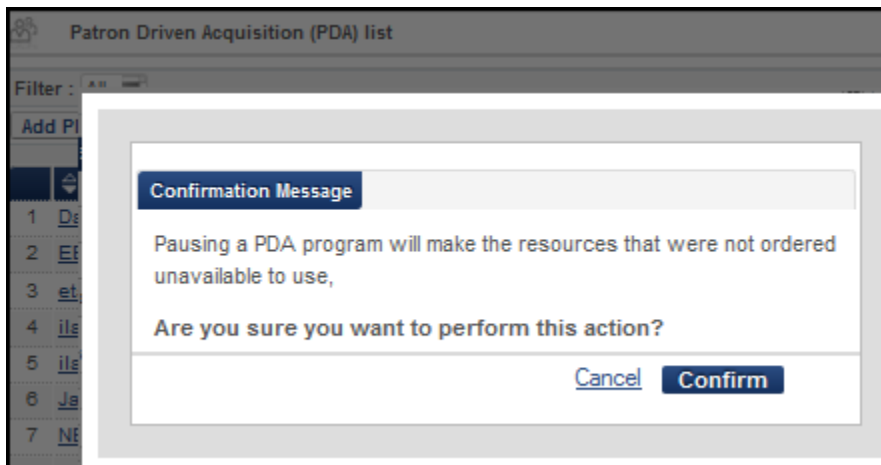


Figure 8 - Confirmation to Pause PDA

- 2 Click **Confirm**. Alma puts the PDA program in a paused mode, resulting in the following restrictions:
  - Suppression of all bibliographic records that were already loaded for this PDA program but not yet purchased
  - Prevention of new bibliographic records being loaded for the PDA program

**To restore PDA publishing when sufficient funds have been replenished to the PDA account:**

- 1 On the Patron Driven Acquisitions (PDA) List page, select **Actions > Resume**.

Name	Code	Status	Vendor	Start D	End Da	Actions
PDA12	PDA12	Paused	Blackwell	08/01/201	07/08/20	Edit Manage PDA Profiles Duplicate <b>Resume</b> Terminate Cleanup Cancel
PDA4	PDA4	Draft	Blackwell	09/01/201	-	
PDA_Danny_PDA_Danny_20		Cancelled	ABC Political Sci	16/10/201	16/10/20	
PDAWithProPDAWITH1		Active	Wylie publishers	15/01/201	07/08/20	
Shai	SHAI	Draft	EEUW Bookseller	19/01/201	-	
shai test	123	Active	EEUW Bookseller	09/02/201	-	
test1	test1	Active	Blackwell	01/11/201	-	

Figure 9 - PDA Resume Selection

A confirmation box opens.

- 2 Click **Confirm**.

The status of the PDA returns to **Active** and, on the **Actions** drop-down list, **Pause** takes the place of **Resume**. All of the bibliographic records that were suppressed are un-suppressed and made available for use.

## Other Acquisitions Enhancements

- A **Refresh** button was added to the Rollover Ledgers page (**Acquisitions > Advanced Tools > Rollover Ledgers**), enabling you to view the progress of this job.

# Resource Management

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

## Enrich General Publishing Records with Electronic Inventory Information

### Description

As a continuation of the general profile enhancements for publishing in May, this enhancement allows you to enrich general publishing records with electronic inventory information for the purpose of integrating with third-party platforms.

### Technical Instructions

The following roles can customize general publishing profiles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

#### To publish electronic inventory information:

- 1 Access the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**).
- 2 Edit a General profile.
  - a Select the **General Profiles** filter to display all the general publishing profiles.
  - b Select **Actions > Edit** for the profile you want to edit.
  - c Click the **Data Enrichment** tab.

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

Profile Id 537293410000121 Profile Name COPAC

**Profile Details** **Data Enrichment** **OAI Publishing**

**Bibliographic Normalization**  
Correct the data using  normalization rules

**Physical Inventory Enrichment**  
Add Holdings information   
No records were found.

Add Items Information

**Electronic Inventory Enrichment**  
Add Electronic Portfolio Information

[Cancel](#) **Save**

Figure 10 - Data Enrichment Tab

- d In the Electronic Inventory Enrichment section, select the **Add electronic portfolio information** check box.

**Publishing Profile Details** Cancel Save

Profile Id 537293410000121 Profile Name COPAC

Profile Details Data Enrichment OAI Publishing

**Bibliographic Normalization**

Correct the data using  normalization rules

**Physical Inventory Enrichment**

Add Holdings information

No records were found.

Add Items Information

**Electronic Inventory Enrichment**

Add Electronic Portfolio

Information

Repeatable field

Access URL subfield  Link Resolver Base URL

Collection Name subfield  Library subfield

Intrface Name subfield  Public Note subfield

Coverage Statement subfield

Cancel Save

Figure 11 – Electronic Inventory Enrichment Section Expanded

- e Enter the following optional fields as needed to include the enrichment information:

Parameter	Description
Repeatable field	Specify the MARC field that will hold the enrichment information in the published record.
Access URL subfield	Specify the subfield that will contain the Access URL for the electronic resource.  <b>Note:</b> If you specify this field, you must enter the <b>Link Resolver Base Resolver</b> field.

Parameter	Description
Link resolver base URL	Enter the base URL for your link resolver. For Alma Link Resolver, use the following format and insert your institution's information where indicated:  <code>http://&lt;primo server host:port&gt;/openurl/&lt;primo institution_code&gt;/&lt;primo view_code&gt;?</code>
Collection name subfield	Specify the subfield that will contain the name of the collection for the electronic resource.
Library subfield	Specify the subfield that will contain the name of the library for the electronic resource.
Interface name subfield	Specify the subfield that will contain the name of the interface for the electronic resource.
Public note subfield	Specify the subfield that will contain public notes for the electronic resource.
Coverage statement subfield	Specify the subfield that will contain the coverage statement for the electronic resource.

3 Click **Save**.

## Configure Email Notifications for Publishing Profiles

### Description

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

### Technical Instructions

The following roles can customize general publishing profiles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

**To configure email notifications:**

- 1 Access the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**).
- 2 Select **Actions > Edit** for the publishing profile you want to edit.

The screenshot shows a web form titled "Publishing Profile Details" with a "Cancel" and "Save" button at the top right. The form contains the following sections:

- Profile Information:** Profile Id: 537293410000121, Profile Name: COPAC.
- Profile Details:** Profile Name: COPAC, Profile Description: Coalition of University Research Libraries (CURL) OPAC.
- Status:** Active (selected), Inactive.
- Scheduling:** On the 01 of every month. An "Email Notifications" button is highlighted with a red box.
- Content:** Set name: american history.
- Publishing Protocol:** FTP configuration: ftp1, Sub-directory: (empty).
- Files Configuration:**
  - Single File Configuration: MARC output format: MARC21 XML.
  - Compressed File Configuration: Compressed file name prefix: kmu, Compressed file extension: tar.gz.

At the bottom right, there are "Cancel" and "Save" buttons.

Figure 12 – Profile Details Tab

3 Click **Email Notifications** in the Profile Details tab.

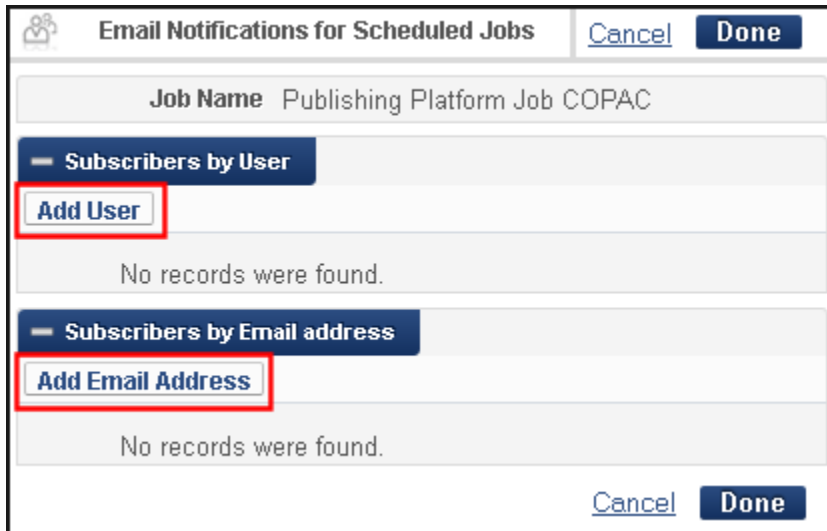


Figure 13 – Email Notifications for Scheduled Jobs Page

4 Select the users to whom you want to send email notifications.

a Click **Add User**.

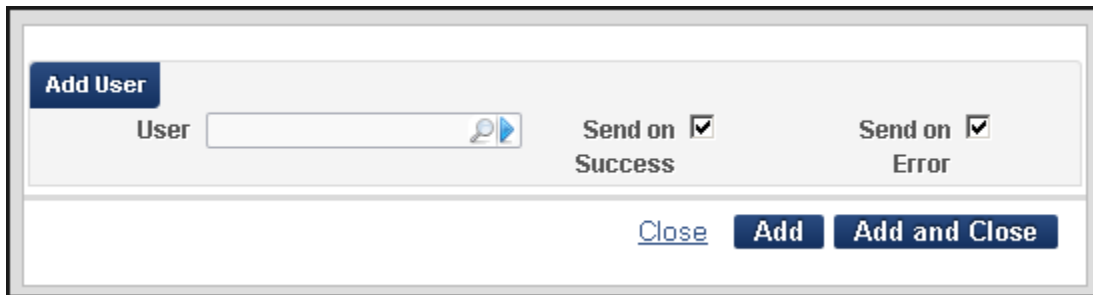


Figure 14 – Add User Dialog Box

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

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

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

5 Select the email addresses to which you want to send email notifications.

a Click **Add Email Address**.

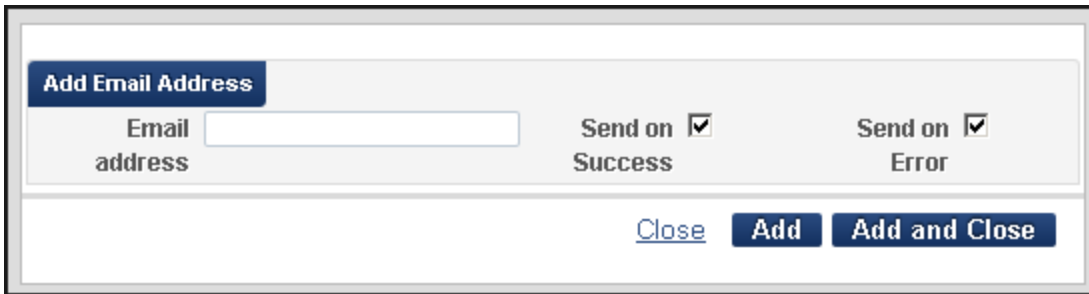


Figure 15 – Add Email Address Dialog Box

- b In the **Email address** field, enter an email address.
  - c Select the following options to specify when the email notification will be sent to the email address: **Send on Success** and **Send on Error**.
  - d Click **Add** to include additional email addresses, click **Add and Close** to add the email address and also close the dialog box, or click **Close** to exit the dialog box.
- 6 Click **Done** to return to the Profile Details tab.
  - 7 Click **Save** to save your changes to the publishing profile.

## Send to Ex Libris Action Added to the Institution Tab Search Results

The **Send to Ex Libris** action which provides the ability to open a Salesforce case related to electronic resource content is now available in the Institution tab search results for electronic resources (previously only available in the Community tab).

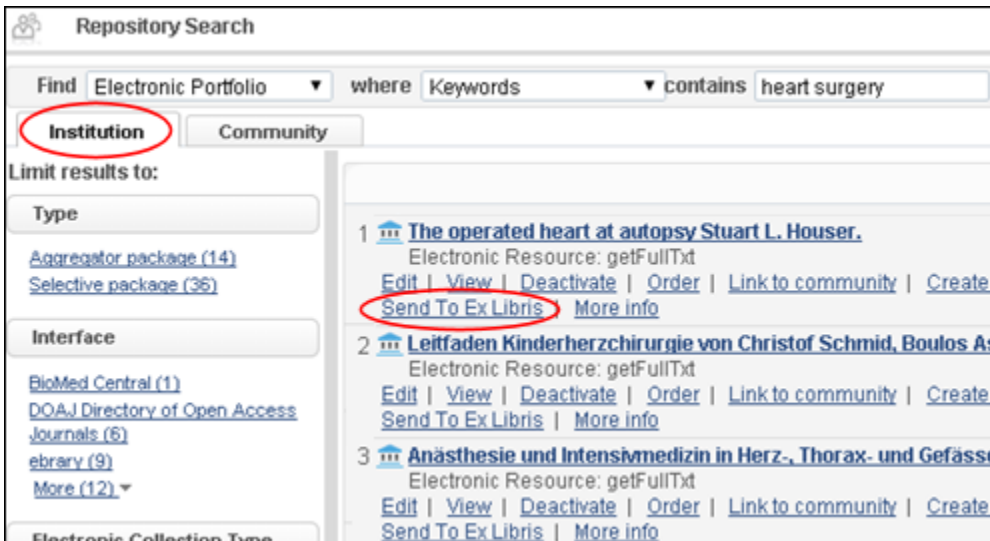


Figure 16 - Send to Ex Libris Search Results Action on the Institution Tab

With this enhancement, you can now more easily report record corrections to Ex Libris Data Services using locally updated records to illustrate the correction(s) needed. Clicking the **Send To Ex Libris** link opens the Send to Ex Libris page for this purpose.

The screenshot shows a web form titled "Send To Ex Libris". At the top right, there are "Back" and "Send" buttons. The form contains several input fields:

- Contact name: Rebecca Man
- Importance: High
- Subject: The Operated Heart at Autopsy
- CRM Category: CKB Electronic Portfolio
- CRM SubCategory: Update

Below these fields is a large text area labeled "Description". At the bottom, there is a scrollable area labeled "Additional info:" containing the following text:

```
===== DATA INFORMATION =====  
CKB ID/CZ MMS ID: null  
LOCAL MMS ID: 992078426901161  
TITLE: The Operated Heart at Autopsy  
ISBN: 9781603278089  
  
E-COLLECTION ID: null  
E-COLLECTION NAME: null
```

Figure 17 - Send to Ex Libris Page

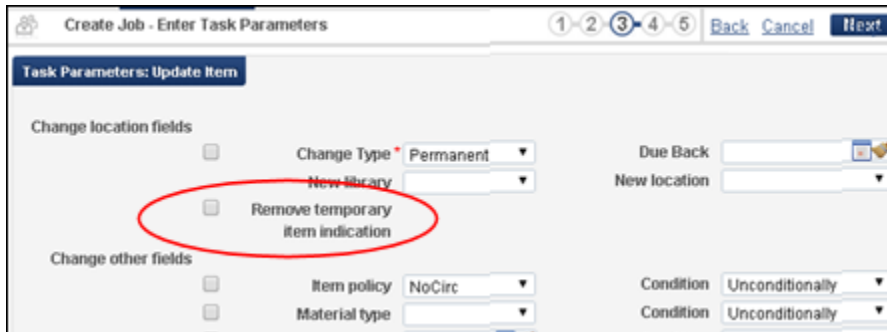
## Enhanced Record Locking Options

With this release, Alma provides more flexibility for working with records that are in a locked state. If an imported record affects a locked record, Alma will free the locked record for processing as a working copy (versus a locked copy). This should significantly reduce the number of records that are skipped during the import process due to lock-related issues.

# Remove Temporary Location Added to Batch Job Processing

## Description

The **Change physical items** batch job parameters have been enhanced to include a new option called **Remove temporary item indication** that provides the ability to update a set of items with the indication that the items are no longer in a temporary location.



The screenshot shows a web-based interface titled "Create Job - Enter Task Parameters". At the top, there are navigation buttons: "1", "2", "3" (highlighted), "4", "5", "Back", "Cancel", and "Next". Below the title bar, there is a section titled "Task Parameters: Update Item". Under this section, there are two main groups of fields: "Change location fields" and "Change other fields". In the "Change location fields" group, there is a checkbox labeled "Remove temporary item indication" which is circled in red. Other fields in this group include "Change Type" (set to "Permanent"), "New library" (dropdown), "Due Back" (calendar icon), and "New location" (dropdown). In the "Change other fields" group, there are checkboxes for "Item policy" (set to "NoCirc") and "Material type" (dropdown), and two "Condition" dropdowns (both set to "Unconditionally").

Figure 18 - Remove Temporary Item Indication Parameter

When you run the job, the item records identified in the job set are updated to show the **No** radio button selected for the **Item is in temporary location** parameter.

The screenshot shows the 'Physical Item Editor' interface. At the top, the 'Resource description' is 'The history of heart surgery in the United States (1939-1960). Liss, Ronald Sandor. Juris Verlag Z 1967.' Below this, the 'Holding' is 'Firestone Library (F): 1 Firestone Library, RD598 .L577 1967' and the 'Barcode' is '32101003801493'. The 'Process type' is currently empty. The interface is divided into several tabs: 'Summary', 'General Information', 'ENUM/CHRON information', 'Notes', and 'History'. The 'General Information' tab is active, showing fields for 'Barcode', 'Material type' (Book), 'Inventory date', 'PO line', 'Receiving date', 'Enumeration A', 'Chronology I', 'Description', 'Replacement cost', and 'Process type'. On the right side of this tab, there are fields for 'Copy ID' (1), 'Item policy' (Gen), 'Provenance', 'Is Magnetic' (No), 'Expected receiving date', 'Enumeration B', and 'Chronology J'. Below the 'General Information' tab, there are sections for 'Location Information' and 'Additional Information'. The 'Additional Information' section is expanded, showing 'Temporary Location Information' with a red circle around the 'Item is in temporary location' field, which has radio buttons for 'No' (selected) and 'Yes'. Other fields in this section include 'Temporary Library', 'Temporary call number type', 'Temporary item policy', 'Temporary location', 'Temporary call number', and 'Due Back Date'.

Figure 19 - Item is in Temporary Location Parameter Set to No

## Technical Instructions

The following roles can remove the temporary item indication:

- Catalog Manager
- Catalog Administrator
- Repository Manager

**To run a batch job with the Remove temporary item indication option selected:**

- 1 Click **Run a Job** (**Administration** > **Manage Jobs**).
- 2 Select **Information Update** from the **Type** filter drop-down list.
- 3 Select **Change physical items** and click **Next**.

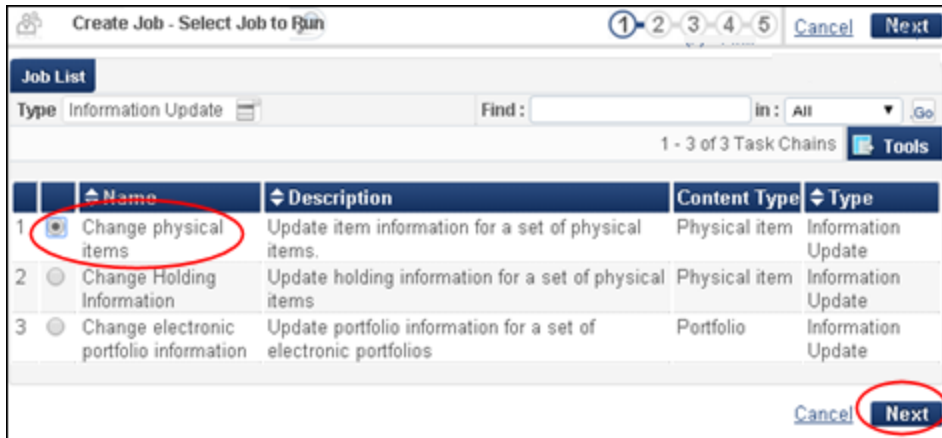


Figure 20 - Select Change Physical Items and Click Next

- 4 From step 2 of the run job wizard, select the set of physical item records to be processed and click Next.
- 5 Select the **Remove temporary item indication** option.

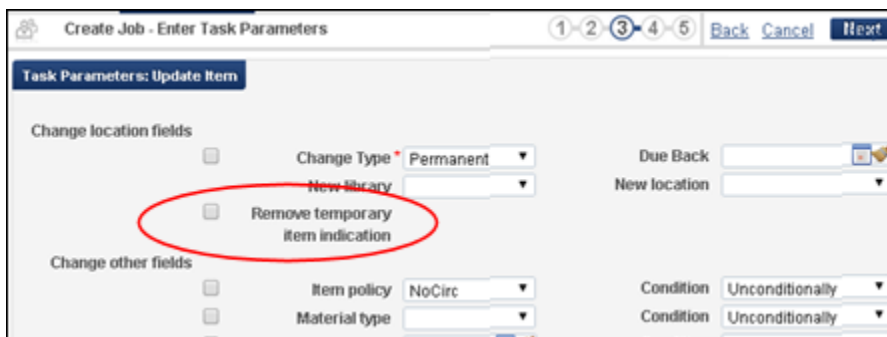


Figure 21 - Remove Temporary Item Indication Option

- 6 Complete the remaining run job parameters as you normally would to run the job.

## Creating Title Sets

### Description

You can now create title sets from itemized sets of physical items, electronic portfolios, or digital files. The new set contains the titles of the items in the original set. This can be useful in several cases, for example:

- You have a set of physical items and you want to see how many copies of each item you have. By converting the physical items set to a titles set, you can see the number of available copies.
- You have a set of physical items that you want to combine with a set of titles. By converting the physical items set to a titles set, you can combine the two sets.

## Technical Details

The following roles can access this enhancement:

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

### To create title sets:

- 1 From the Manage Sets page (**Resource Management > Search and Sets > Manage Sets**), select **Actions > Create title set** for an itemized set of physical items, electronic portfolios, or digital files.

Active	Name	Type	Contents Type	Creation Date	Actions
1	1	Itemized	Authorities	01/04/2014 05:09:01 PM IDT	Actions
2	Advanced Theory and Practice in Sport Marketing	Logical	Electronic portfolios	24/02/2014 01:44:50 PM IST	Actions
3	Advanced Theory and Practice in Sport Marketing - combined - 24/02/2014 01:45:22 PM IST	Itemized	Electronic portfolios	24/02/2014 01:46:26 PM IST	Actions
4	Advanced Theory and Practice in Sport Marketing - combined - 24/02/2014 01:45:22 PM IST - combined - 24/02/2014 01:51:36 PM IST	Itemized	Electronic portfolios	24/02/2014 01:51:48 PM IST	Actions
5	american history - itemized - 2013-12-26 04:51:05	Itemized	All Titles	26/12/2013 06:51:12 AM IST	Edit
6	american history - itemized - 2013-12-26 04:51:05 - combined - 21/01/2014 09:42:54 AM IST	Itemized	All Titles	21/01/2014 09:43:20 AM IST	Members
7	american history - itemized - 2013-12-26 04:51:05 - combined - 21/01/2014 09:42:54 AM IST - combined - 21/01/2014 10:02:42 AM IST	Itemized	All Titles	21/01/2014 10:02:58 AM IST	Duplicate
8	american history - itemized - 2013-12-26 04:51:05 - combined - 21/01/2014 09:42:54 AM IST - combined - 21/01/2014 10:02:42 AM IST - combined - 26/01/2014 10:31:11 AM IST	Itemized	All Titles	26/01/2014 10:31:42 AM IST	Combine sets
					Create titles set
					Delete
					Actions

Figure 22 – Create Title Set

The Set Details page opens with information concerning the new title set—such as the date and time that the set was created—added to the set name.

Figure 23 – Set Details Page

- 2 Fill in the **Description** and **Note** fields (optional) and click **Submit**. A confirmation message such as the following is displayed.

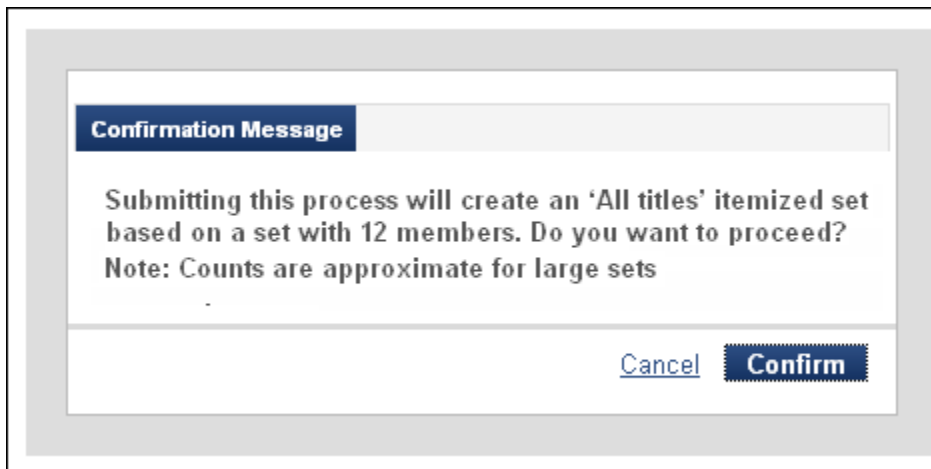


Figure 24 – Confirmation Message

- 3 Click **Confirm**. The job runs and creates the title set. When the job is finished, the new set is displayed in the list of sets.

Active	Name	Type	Contents Type	Creation Date	Actions
1	1	Itemized	Authorities	01/04/2014 05:09:01 PM IDT	Actions
2	Advanced Theory and Practice in Sport Marketing	Logical	Electronic portfolios	24/02/2014 01:44:50 PM IST	Actions
3	Advanced Theory and Practice in Sport Marketing - combined - 24/02/2014 01:45:22 PM IST	Itemized	Electronic portfolios	24/02/2014 01:46:28 PM IST	Actions
4	Advanced Theory and Practice in Sport Marketing - combined - 24/02/2014 01:45:22 PM IST - combined - 24/02/2014 01:51:36 PM IST	Itemized	Electronic portfolios	24/02/2014 01:51:48 PM IST	Actions
5	Advanced Theory and Practice in Sport Marketing - combined - 24/02/2014 01:45:22 PM IST - combined - 24/02/2014 01:51:36 PM IST - titles - 11/06/2014 03:46:46 PM IDT	Itemized	All Titles	11/06/2014 03:58:43 PM IDT	Actions
6	american history - itemized - 2013-12-26 04:51:05	Itemized	All Titles	26/12/2013 06:51:12 AM IST	Actions
7	american history - itemized - 2013-12-26 04:51:05 - combined - 21/01/2014 09:42:54 AM IST	Itemized	All Titles	21/01/2014 09:43:20 AM IST	Actions
8	american history - itemized - 2013-12-26 04:51:05 - combined - 21/01/2014 09:42:54 AM IST - combined - 21/01/2014 10:02:42 AM IST	Itemized	All Titles	21/01/2014 10:02:58 AM IST	Actions

Figure 25 – New Titles Set

## Other Resource Management Enhancements

- Ex Libris now supports the Eprints remote digital repository.
- With the July release, Alma is being enhanced in the following areas to display the override name for an electronic collection:
  - Community Zone Updates Task List
  - Excel files created from the Tools option
  - Display logic rules
- In the MD Editor, the number of displayed bibliographic headings that match the characters typed by the user has been increased so that the user has more results from which to choose.
- The **RSS URL** link has been added to the RSS job report.
- The **Select All** option is now available when adding members to an inventory itemized set.

# Fulfillment

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

## Select Booking or Hold Requests When Configuring Display Logic Rules

### Description

This feature enables selecting either **Booking** or **Hold** requests when configuring display logic rules. Previously, the **Request** option included hiding of both booking requests and hold requests. Now, the hiding of booking requests and hold requests can be selected as separate options.

### Technical Instructions

The following roles can select booking and hold requests when configuring display logic rules:

- General System Administrator
- Fulfillment Administrator

#### To select a Booking and/or Hold request when configuring display logic rules:

- 1 On the Discovery Interface Display Logic page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Display Logic Rules**), click **Add Rule**. The Add Rule Dialog Box opens.

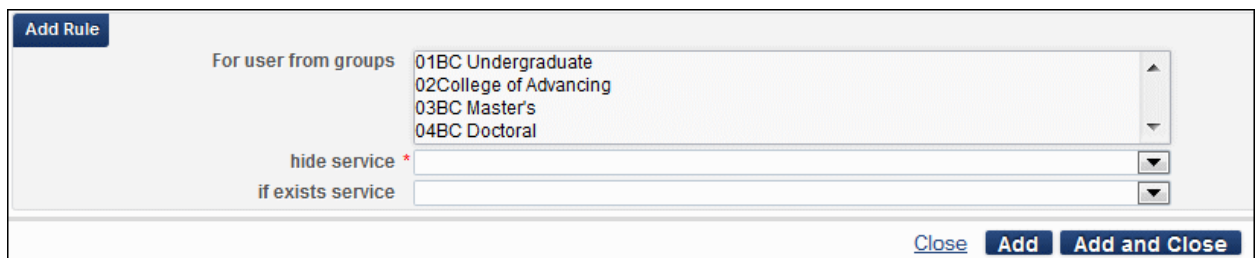


Figure 26 – Add Rule Dialog Box

- 2 From the **For user from groups** list, select the groups whose users are to be affected by the configured rule.

- 3 In the **Hide service** drop-down list, select the service to be hidden in the Primo Get It and View It tabs by the configured rule. The **Booking Request** and **Hold Request** options appear.

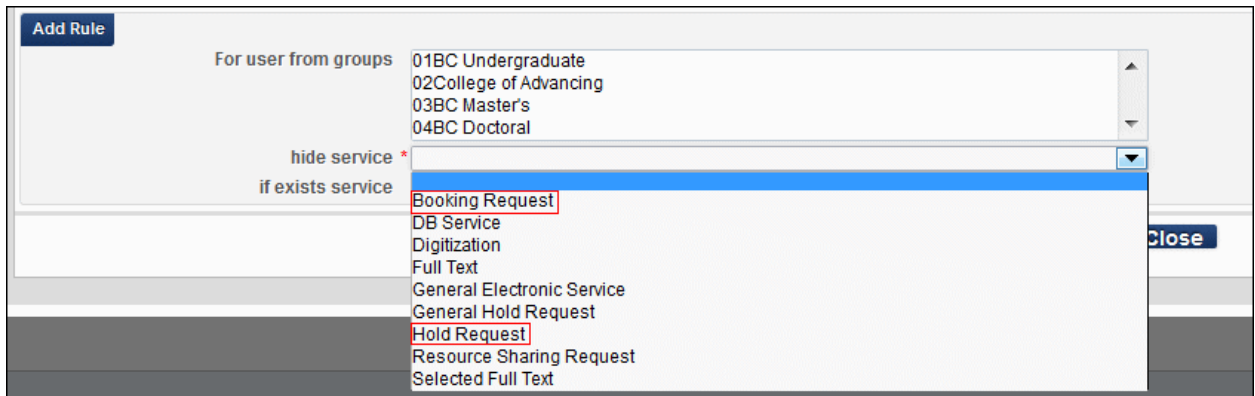


Figure 27 – Add Rule Dialog Box — Booking Request and Hold Request Options

- 4 Optionally, select a value in the **if exists service** field to indicate that the value in the **hide service** field takes effect only if the selected service exists.

## Requesting a Bib Record Item Without a Description

### Description

This feature enables placing a request for a resource containing items without a description, even if some of the title's items do have explicit descriptions.

When creating a request for a repository item, items must be selected according to their configured description. It is now possible to select an item without a description by selecting the new **All** option on the Create Request page, which selects all items, including those that do not contain a description.

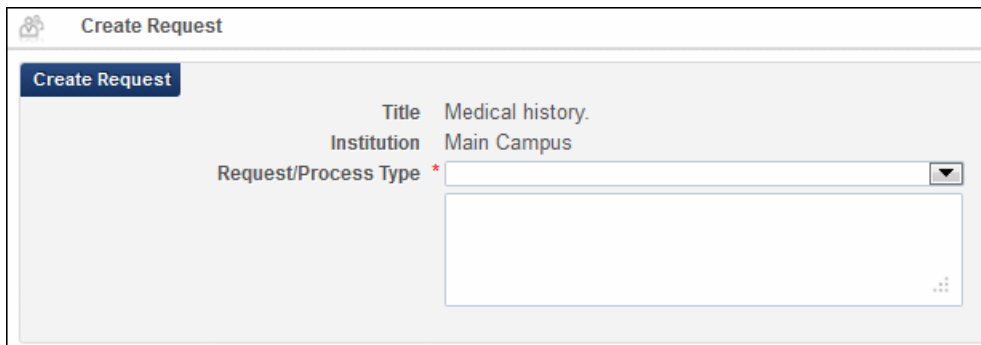
## Technical Instructions

To request an item without a description, you must have the following role:

- Fulfillment Services Operator

### To request an item without a description:

- 1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), click **Request** for a title that contains both an item with a description and without a description. The **Create Request** page opens.

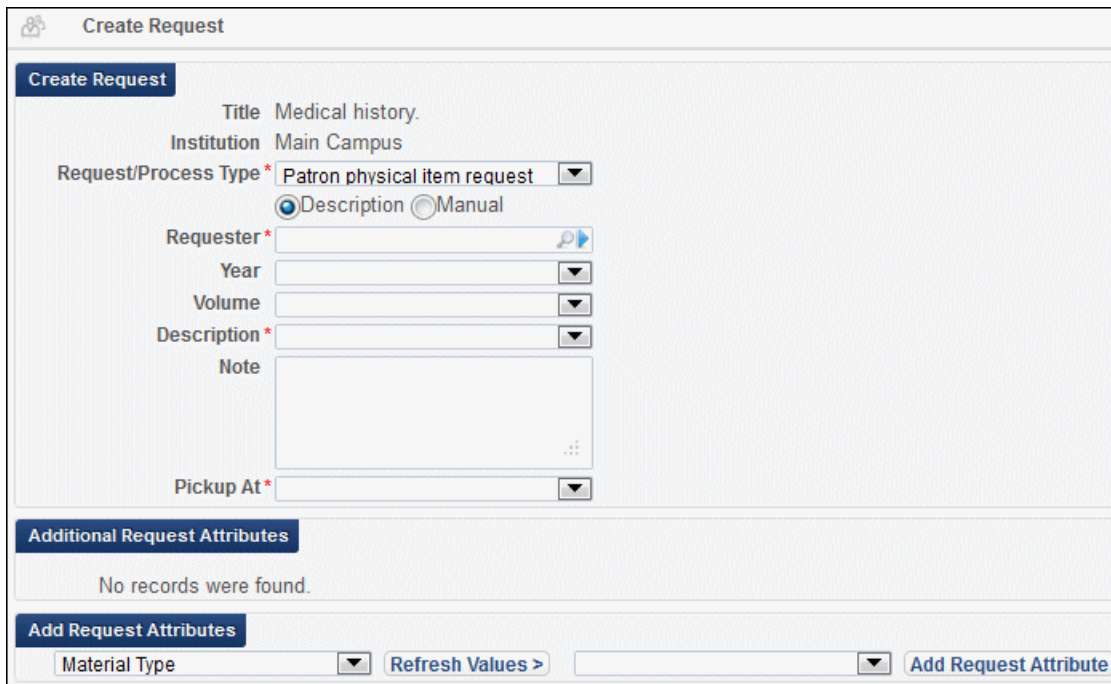


The screenshot shows the 'Create Request' page with the following fields:

- Title: Medical history.
- Institution: Main Campus
- Request/Process Type: A dropdown menu with a downward arrow.

Figure 28 – Create Request Page

- 2 In the **Request/Process type** field, select a request/process type. The page refreshes and displays additional fields.



The screenshot shows the 'Create Request' page with the following fields:

- Title: Medical history.
- Institution: Main Campus
- Request/Process Type: Patron physical item request (selected in dropdown)
- Description:  Description  Manual
- Requester: Text input field with a search icon and a blue arrow icon.
- Year: Dropdown menu
- Volume: Dropdown menu
- Description: Text input field
- Note: Text area with a search icon and a blue arrow icon.
- Pickup At: Dropdown menu

Below the main form, there is a section titled 'Additional Request Attributes' with the message 'No records were found.' and an 'Add Request Attributes' button. At the bottom, there is a 'Material Type' dropdown menu, a 'Refresh Values >' button, and an 'Add Request Attribute' button.

Figure 29 – Create Request Page with Additional Fields

- 3 In the **Description** field, click the drop-down arrow. The descriptions of the available items appear. If there are any items that do not contain a description, the **All** option appears.  
If there are no items that have a description, the **Description** field does not appear.
- 4 Select **All** to select all items for the request, including those that do not have a description.

---

**Note:** The **All** option appears only if there are both items with and without a description. **All** does not appear if all items have a description (that is, there are no items without a description), nor does it appear if you select a value for **Year** or **Volume**.

---

## Viewing Related Fulfillment Rules

### Description

This feature enables viewing the fulfillment rules that are associated with a specific terms of use (TOU).

### Technical Instructions

The following roles can view the fulfillment rules that are associated with a specific TOU:

- General System Administrator
- Fulfillment Administrator

#### To view the fulfillment rules that are associated with a specific TOU:

- 1 On the Terms of Use Management Page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**), select **Actions > Show Related Fulfillment Rules** for a TOU. The Related Fulfillment Rules page opens.

Enabled	Rule Name	Fulfillment Unit	Description	Rule Owner
1 <input checked="" type="checkbox"/>	<a href="#">High Priority One Month Loans</a>	<a href="#">Regular Location Circulating Material</a>	High Priority One Month Loans	Institution

**Figure 30 – Related Fulfillment Rules Page**

The fulfillment rules that are using the selected terms of use display in the table.

- 2 Optionally, you can do the following:
  - Click the link in the **Rule Name** column to open the Fulfillment Unit Rules Editor page for the selected rule.

**Fulfillment Unit Rules Editor**

**Fulfillment Unit**  
Code REGULAR      Name Regular Location Circulating Material

**Fulfillment Unit Rules Editor**  
Name \* High Priority One Month Loans  
Description High Priority One Month Loans  
Created By User, Super      Created On 11/08/2011  
Updated By User, Super      Updated On 22/01/2012

**Input Parameters**

Name	Operator	Value
1 User Group	In List	Graduate Student

Name      Operator      Value  
             [Possible Values >](#)      [Add Parameter](#)

**Output Parameters**  
Terms of Use \* High Priority  [TOU Details](#)      [Add Terms Of Use](#)

**Figure 31 – Fulfillment Unit Rules Editor Page**

- Click the link in the **Fulfillment Unit** column to open the Edit Fulfillment Unit page for the selected fulfillment unit.

**Edit Fulfillment Unit**

You are configuring: Main Campus

[Fulfillment Unit Details](#)      [Fulfillment Unit Locations](#)      [Fulfillment Unit Rules](#)

**Fulfillment Unit**  
Code REGULAR      Name Regular Location Circulating Material

Code \* REGULAR  
Name \* Regular Location Circulating Material  
Description Sets the rules by which items in regular locations circulate

On Shelf Request Policy \*  Request for pickup anywhere regardless of availability  
 Request for pickup in different library only  
 Request for pickup in different campus only  
 No Requesting from available holding  
 No Requesting

**Figure 32 – Edit Fulfillment Unit Page**

## Other Fulfillment Enhancements

- The Requests – Restore Temporarily Shelved Items job report was improved. The following three new elements (indicator links) were added to it:
  - New restore requests created
  - Existing restore requests
  - Failed to create restore requests

Each link provides more information about the case: the permanent library code, the temporary library code, the barcode, the request ID (if relevant), and the error message if the restore requests could not be created.

# Administration

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

## User Type Modification

A User Manager or User Administrator can now change an internal user to an external user and vice versa using the **Toggle Account Type** button on the User Details page (**Administration > User Management > Find and Manage Users**, and select **Actions > Edit** for a particular user).

The screenshot shows the Alma user interface for a user's details. At the top, the Alma logo and 'QA' are visible. The page title is 'User Details'. A navigation bar includes buttons for 'Cancel', 'Toggle Account Type', 'Open For Update', and 'Save'. The user's name is 'Aaberg, Oscar' and their role is 'Graduate Student'. The 'Primary identifier' is '252571' and the 'Record type' is 'Public'. The 'Account Type' is currently set to 'External'. Below this, there are tabs for 'General Information', 'Contact Information', 'Identifiers', 'Notes', 'Blocks', 'Statistics', and 'Attachments'. The 'User Information' tab is active, showing fields for 'First name' (Oscar), 'Last name' (Aaberg), 'Middle name', 'Primary identifier' (252571), 'PIN number', 'Job category', 'Gender', 'Campus', 'Preferred language' (English), 'Status date' (17/07/2011), 'Expiration date', 'Resource sharing library', 'Job description', 'User group' (Graduate Student), 'Website URL', 'Status' (Active), 'Birth date', and 'Purge date'. A 'Generate' button is located next to the 'Primary identifier' field.

Figure 33 – User Details – Toggle Account Type

## Task Parameters Now Used for Processes

The task parameter fields defined when configuring processes (**Resource Management > Resource Configuration > Configuration Menu > General > Processes**) are now displayed as the default parameters in step 3 of the Run a Job wizard (**Administration > Manage Jobs > Run a Job**).

# Resource Sharing

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

## Registering Fees for a Borrowing Request When Receiving an Item

### Description

This feature enables you to automatically create a resource sharing fee for receiving an item. The fee is automatically charged at receiving time, as per the defined policies configured in the Borrowing Requests terms of use (TOU).

### Technical Instructions

The following roles can set up fees for resource sharing borrowing requests:

- General System Administrator
- Fulfillment Administrator

**To configure fees for resource sharing borrowing requests:**

- 1 On the Terms of Use Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**), select **Actions > Edit** for a TOU of **Type = Borrowing Resource Sharing**. The Terms of Use Details page opens.

Terms of Use Details		Cancel	Next
You are configuring: Main Campus			
<b>Terms of Use Details</b>			
Name *	100 Dollar Fee for Borrowing TOU		
Description	This TOU incurs a 100 dollar resource sharing fee.		
Tools			
Allow Resource Sharing Requesting	Resource Sharing Allowed (Allow resource sharing requests)		Actions
Resource Sharing Fee	100 Dollar Fee for Resource Sharing (This fee will cost \$100.)		Actions
Resource Sharing Requests Limit	No Resource Sharing Limit (No resource sharing limit)		Actions
Pickup Locations	Auto pick up in institution_1710120526		Actions

**Figure 34 – Terms of Use Details Page**

- 2 In the **Resource Sharing Fee** field, do one of the following:
  - Select a resource sharing fee policy from the drop-down list.

- Select **Actions > Add Policy** to add a new resource sharing fee policy. The Policy Details page opens.

The screenshot shows the 'Policy Details' page for a 'Resource Sharing Fee' policy. The page is titled 'Policy Details' and indicates 'You are configuring: Main Campus'. The 'Policy Type' is set to 'Resource Sharing Fee'. The form includes the following fields and options:

- Policy Name \***: A text input field.
- Policy Description**: A large text area for entering a description.
- Value Type \***: Radio buttons for 'None' and 'Other'. 'Other' is selected.
- Value \***: A text input field that appears when 'Other' is selected.
- Default Policy**: Radio buttons for 'False' and 'True'. 'False' is selected.

**Figure 35 – Policy Details Page**

Configure parameters for the policy, and click **Save**. For details on creating a resource sharing fee policy, see the following procedure (below).

On the Terms of use Details page, select the newly created policy and click **Next**. The Terms of Use Management Page opens, displaying the selected parameters for the TOU.

- 3 Click **Save**. The fee is collected when the resource sharing borrowing request is received.

#### To create a resource sharing fee policy:

- 1 On the **Policy Details** page, in the **Policy name** field, enter a name for the policy.
- 2 Optionally, in the **Policy description** field, enter a description for the policy.
- 3 In the **Value type** field, select **Other**. The **Value** field appears.
- 4 Enter a numerical value for the fee in the **Value** field.
- 5 In the **Default policy** field, select whether you want the policy to be the default policy when a borrowing request TOU is created.
- 6 Click **Save**.

## Lender Management of Renewal Requests

### Description

This feature enables the lender to approve or reject a renewal request submitted by a borrower. You must configure automatic and/or manual renewal in fulfillment configuration to enable approving or rejecting renewal of resource sharing requests.

## Technical Instructions

The following roles can configure approval of a renewal request:

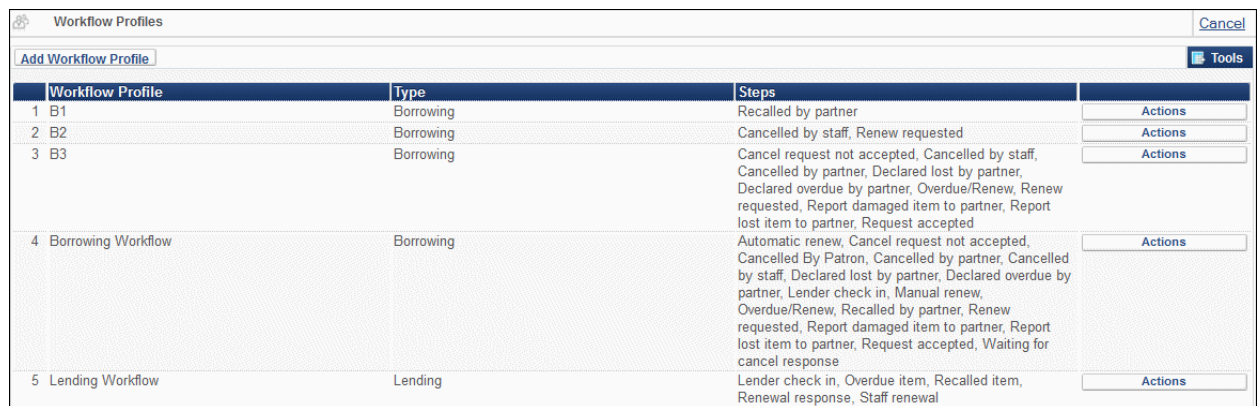
- General System Administrator
- Fulfillment Administrator

The following roles can approve the actual renewal request:

- Fulfillment Services Operator
- Fulfillment Services Manager

### To configure approval of a renewal request:

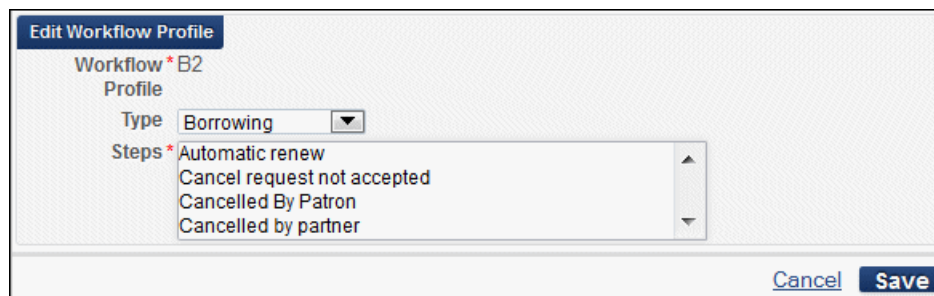
- 1 On the Workflow Profiles page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**), locate a Workflow Profile of **Type = Borrowing**.



Workflow Profile	Type	Steps	Actions
1 B1	Borrowing	Recalled by partner	Actions
2 B2	Borrowing	Cancelled by staff, Renew requested	Actions
3 B3	Borrowing	Cancel request not accepted, Cancelled by staff, Cancelled by partner, Declared lost by partner, Declared overdue by partner, Overdue/Renew, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted	Actions
4 Borrowing Workflow	Borrowing	Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Declared overdue by partner, Lender check in, Manual renew, Overdue/Renew, Recalled by partner, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted, Waiting for cancel response	Actions
5 Lending Workflow	Lending	Lender check in, Overdue item, Recalled item, Renewal response, Staff renewal	Actions

Figure 36 – Workflow Profiles Page

- 2 Select **Actions > Edit**. The Edit Workflow Profile dialog box opens.



**Edit Workflow Profile**

Workflow \* B2  
Profile

Type

Steps \* Automatic renew  
Cancel request not accepted  
Cancelled By Patron  
Cancelled by partner

Figure 37 – Edit Workflow Profile Dialog Box

- 3 In the **Steps** field:

- Select **Automatic renew** to automatically accept renew requests received (via ISO) for borrowing partners linked to this workflow.

- Select **Manual renew** to enable manually approving renewal requests for borrowing partners linked to this workflow profile.

### To manually approve an ISO renewal request:

- 1 Locate a request for which **Automatic renew** was not selected as a workflow profile step (in the previous procedure) and **Manual renew** was selected. The request's status is **Renew Requested**.

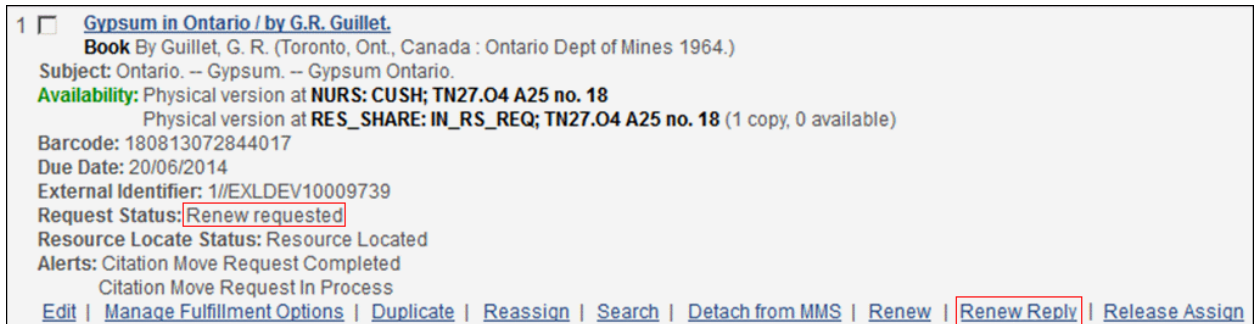


Figure 38 – Resource Sharing Borrowing Requests Page — Renew Requested Status and Renew Reply Link

- 2 Click **Renew Reply** to open the Accept Renewal Request dialog box.

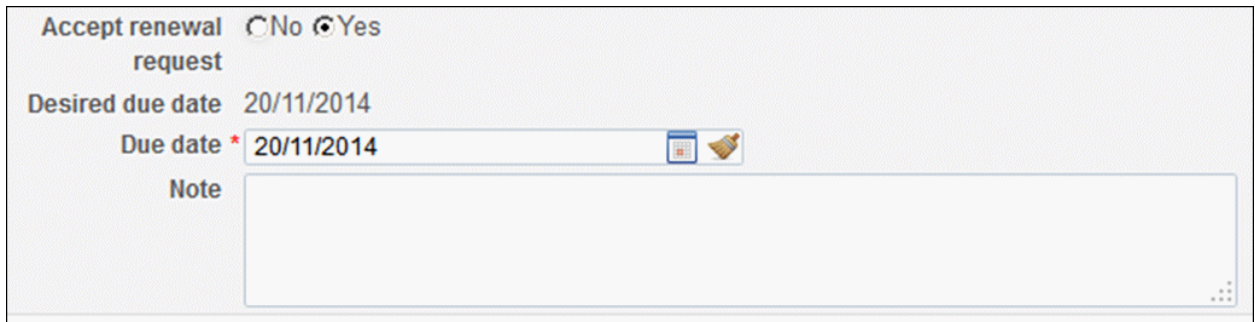


Figure 39 – Accept Renewal Request Dialog Box

Approving the renewal request updates the request's status to **Renew Request Accepted**.

Rejecting the renewal request updates the request's status to **Renew Request Not Accepted**.

- If **Automatic renew** was selected as a workflow profile step in the previous procedure, the request is automatically renewed as per the requested due date, and the request's status is updated to **Renew Request Accepted**.
- If neither **Automatic renew** nor **Manual renew** was selected as a workflow profile step in the previous procedure, the renewal request is automatically rejected.

### To manually approve a non-ISO renewal request:

- 1 Ensure that the borrowing partner's borrowing workflow profile has **Manual Renew** selected as a step (see the **To configure approval of a renewal request** procedure, above).


2 Locate a request with the status **Received by partner**.



1  [Business immigrants.](#)  
**Book** ([Ottawa] : Employment and Immigration Canada 1985.)  
Subject: Canada. -- Investments, Foreign. -- Industrial promotion. and others  
**Availability:** Physical version at **NURS: CUSH; HC120.I53 B875 1985**  
Physical version at **RES\_SHARE: IN\_RS\_REQ; HC120.I53 B875 1985** (1 copy, 0 available)  
Barcode: 180813072844031  
Due Date: 21/05/2015  
External Identifier: 1//EXLDEV10009742  
Request Status: **Received by partner**  
Resource Locate Status: Resource Located  
Alerts: Citation Move Request Completed  
Citation Move Request In Process  
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Renew](#) | [Release Assign](#) |

Figure 40 – Resource Sharing Borrowing Requests Page — Renew Link

3 Click **Renew** to open the due date dialog box.





Due date \* 21/05/2015    
[Cancel](#) **OK**

Figure 41 – Due Date Dialog Box

4 Enter a due date and click **OK** to accept the renewal request.

# Analytics

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

## Enhancements to the PO Line Dimension

### Description

The PO Line dimension is a shared dimension and is available in several subject areas, including:

- Fund Expenditure
- Physical Items
- Cost Usage
- E-Inventory > Package PO Line
- E-Inventory > Portfolio PO Line

Many missing fields from the PO line dimension in Alma have been added as part of this enhancement.

### Technical Details

The Design Analytics role can access this enhancement.

### ***Columns Added to PO Line Dimension***

The primary additions for this development are the columns related to PO line amounts (for example: list price, currency, and net price). Many customers requested that these fields be added to enable them to run reports on the item level with the relevant cost information. This is not possible from the Funds Expenditure subject area.

Additionally, many fields related to the PO line vendor information have been added (vendor name, note to vendor, rush indicator, and so forth).

The following table contains a comprehensive list of all the new columns added.

Field	Description
Quantity For Pricing	The number of items purchased for the list price quoted in this PO line.
Discount	The discount amount.
List Price	The price of the item before discount.
Currency	The currency of the transaction.
Net Price	The price after the discount.
Vendor Name	The vendor name as defined in the Alma vendor details definitions.
Vendor Code	The vendor code as defined in the Alma vendor details definitions.
Material Supplier	The material supplier field as displayed in Alma PO line page. This is a concatenation of: name (code)/account description (account code). For example: <a href="#">YBP LIBRARY SERVICES (YANKEE)/YBP LIBRARY SERVICES (YANKEE)</a>
Note To Vendor	Notes to the vendor.
Rush	Indicates whether the PO line is to be rushed.
Cancellation Restriction	Indicates if a cancellation restriction note containing a warning upon the cancellation of a PO line is configured to be displayed.
Cancellation Restriction Note	The warning to be displayed when canceling a PO line.
Shipped To Address Line 1-5	The shipped to address lines.
Shipped To Address City	The shipped to city.
Shipped To Address Country	The shipped to country.

Many of the above fields are taken from the PO Line Summary page.





Vendor information	
Material Supplier *	0-123/0-123-123  
Claiming grace period (days)	0
Or expected receipt date	08/02/2012  
O'niel (0-123)/ 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

Figure 42 – PO Line Summary Page – Vendor Information and Pricing

PO Line details	
Acquisition method	Purchase
Invoice status	Fully invoiced
Rush	<input type="checkbox"/>
Cancellation restriction	<input type="checkbox"/>
Identifier	9780760765455 (Paperback)
Vendor reference number	
Note to vendor	
Material type	Art Original
Reporting Code	
Cancellation restriction note	
Proposed Identifier	
Vendor reference number type	
Vendor invoice number	-

Figure 43 – PO Line Summary Page – PO Line Details

The following is an example of a report of items received in the previous three months, displaying the net price:

PO Number	PO Line Reference	Item Id	Barcode	Receiving Date	Net Price
1103-14	POL-13808	23173549240001421	31864000792368	4/4/2014 4:51:53 PM	57
1258-14A	POL-29035	23173780960001421	31864000813966	4/4/2014 4:52:14 PM	90
1264-14A	POL-85501	23177801480001421		4/4/2014 2:46:13 PM	33
1307-14	POL-32201	23173910900001421	31864000787707	4/4/2014 5:09:36 PM	25
	POL-32203	23173910740001421	31864000787715	4/4/2014 5:09:45 PM	50
1449-14A	POL-35935	23176444080001421	31864000796484	12/10/2014 10:10:32 PM	28
1630-14a	POL-90901	23177882580001421	31864000685281	5/19/2014 7:46:49 PM	23
1630-14c	POL-91002	23177882260001421	31864000685224	5/19/2014 7:00:43 PM	18
	POL-91303	23177931240001421	31864000685216	5/19/2014 6:55:42 PM	18
1630-14d	POL-87701	23177888070001421	31864000685240	5/19/2014 7:17:59 PM	26
	POL-91901	23177908430001421	31864000685257	5/19/2014 7:22:20 PM	17
1630-14f	POL-93302	23177905530001421	31864000685182	5/19/2014 5:17:48 PM	27
	POL-93502	23177905060001421	31864000685273	5/19/2014 7:39:27 PM	17
1645-14b	POL-95705	23177990100001421	31864000685190	5/19/2014 5:22:29 PM	19
1646-14	POL-98503	23177997730001421	31864000795700	4/4/2014 7:03:52 PM	65
1648-14a	POL-97602	23178000140001421	31864000685265	5/19/2014 7:34:19 PM	25
	POL-98704	23177997090001421	31864000685232	5/19/2014 7:12:56 PM	33
	POL-98905	23177995880001421	31864000685208	5/19/2014 5:35:27 PM	17
1746-14A	POL-134528	23179526620001421	31864000680407	4/3/2014 1:38:25 PM	98
1864-14	POL-147912	23180360380001421	31864000833154	4/3/2014 3:29:18 PM	155
	POL-147923	23180360050001421	31864000680415	4/3/2014 1:44:00 PM	129

Figure 44 – Items Received in the Previous Three Months

The following is an example of a report per vendor, displaying the number of days to arrival for each order:

AMAZON.COM								
PO Number	PO Line Reference	Item Id	Barcode	Sent Date	Receiving Date	Expected Receiving Date	Net Price	Days to Arrive
1307-14	POL-32201	23173910900001421	31864000787707	10/8/2013	4/4/2014 5:09:36 PM	10/7/2013	25	178
	POL-32203	23173910740001421	31864000787715	10/8/2013	4/4/2014 5:09:45 PM	10/7/2013	50	178
1646-14	POL-98503	23177997730001421	31864000795700	12/3/2013	4/4/2014 7:03:52 PM	12/2/2013	65	122
1868-14	POL-148105	23180400880001421	31864000670978	2/18/2014	4/4/2014 7:13:05 PM	2/17/2014	72	45
1929-14	POL-150120	23181171450001421	31864000680605	3/10/2014	4/7/2014 4:13:48 PM	3/9/2014	86	28
1946-14	POL-150242	23181207970001421		3/13/2014	4/8/2014 1:45:27 PM	3/12/2014	27	26
1963-14	POL-150379	23181360380001421	31864000671406	3/18/2014	4/15/2014 4:56:06 PM	3/17/2014	36	28

Figure 45 – Vendor Report

## Name Changes to Several Fields of PO Line Dimension

The names of the following fields have changed:

New Name	Previous Name
Shipped To Address Id	Ship To Address
Expected Receipt after ordering interval	Expected Receiving Interval
Assigned to	Assign to
Additional Order Reference [to be deprecated]  <b>Note:</b> This column will be deprecated in the near future and should not be used.	Additional Order Reference

## Transaction Date Enhancements

### Description

The following changes have been implemented to the Periods dimension in the Funds Expenditure subject area:

- The dimension has been renamed **Transaction Date**.
- If the **Transaction Date** field is left empty, it appears as a blank (null value) in the report rather than 1/1/11 as it did previously.
- The order of the fields has been changed to be clearer and more logical.
- The words **to be deprecated** have been added to fields that will be deprecated in the near future. These columns should not be used.
- The names of all date fields, as displayed in the following table, have been modified to be clearer. (Previously, users needed to rename the field when creating reports since all date fields were named `date key xxx`. The names are now comprehensible.)

New Name	Previous Name
Transaction Date Month	Month Desc
Transaction Date Month Key	Month Key
Transaction Date Full Month	Full Month Desc
Transaction Date Quarter	Quarter Desc
Transaction Date Year	Year
Transaction Date Fiscal Year	Fiscal Year Desc
Transaction Date	Date key

---

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

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

---

## Technical Details

The Design Analytics role can access this enhancement.

### To access the Transaction Date dimension in Alma Analytics:

Select **Funds Expenditure > Transaction Date**.

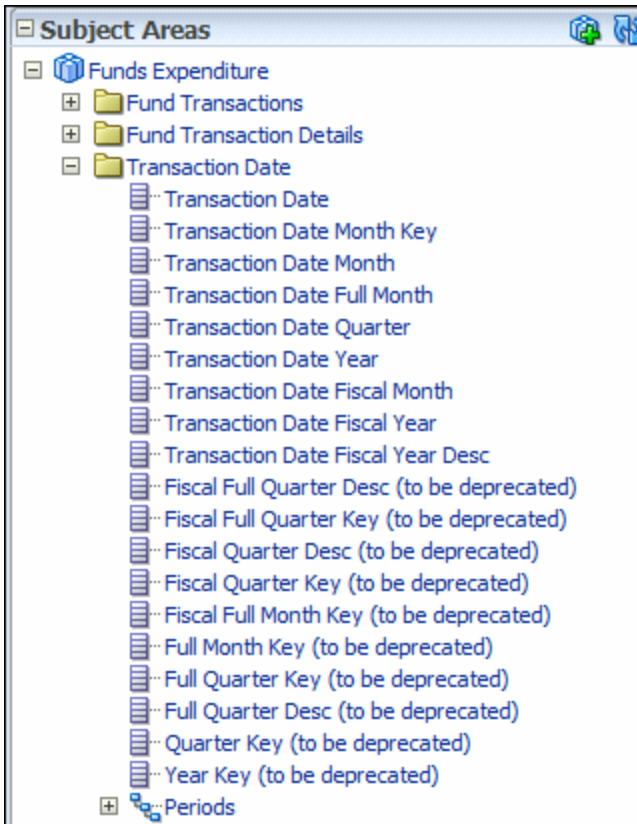


Figure 46 –Transaction Date

## Commas Removed from ID Numbers

Previously, ID numbers were displayed in Alma Analytics with commas separating every three digits, which implied that the number was a count. These commas have now been removed.

The following is an example of a previous report:

Fine Fee Transaction Id	Loan Date	Loan Time	Return Date	Return Time	Original Amount
8,412,789,150,001,021	7/11/2013	15:01:59	7/11/2013	18:22:33	20
8,412,789,160,001,021	7/11/2013	13:17:10	7/11/2013	19:27:43	20
8,425,619,450,001,021	7/11/2013	22:45:06	7/12/2013	14:25:26	40
8,437,680,030,001,021	7/13/2013	17:14:05	7/13/2013	20:19:57	20
8,442,460,210,001,021	7/12/2013	14:31:54	7/14/2013	20:28:38	60
8,456,507,370,001,021	7/15/2013	12:20:38	7/15/2013	15:36:08	20
8,456,507,400,001,021	7/14/2013	18:08:04	7/15/2013	18:00:13	40
8,456,507,480,001,021	7/15/2013	14:12:34	7/15/2013	21:31:50	20
8,469,605,110,001,021	7/15/2013	23:55:06	7/16/2013	02:28:24	40
8,469,608,480,001,021	7/11/2013	19:34:33	7/16/2013	20:59:29	40
8,495,605,130,001,021	7/13/2013	14:58:28	7/18/2013	22:05:02	40
8,495,605,240,001,021	7/18/2013	17:42:58	7/18/2013	00:43:47	20

Figure 47 – ID Numbers with Commas

The following is an example of a new report:

Fine Fee Transaction Id	Loan Date	Loan Time	Return Date	Return Time	Original Amount
38490040000 121	6/17/2012	08:10:49	9/5/2012	14:36:15	50
53779110000 121	7/12/2012	14:45:16	8/21/2012	12:56:44	50
54042360000 121	7/30/2012	09:04:10	7/30/2012	09:05:13	50
55526740000 121	7/25/2012	15:23:46	7/25/2012	15:24:43	-50
55526750000 121	7/25/2012	15:23:46	7/25/2012	15:24:43	50
55526760000 121	7/25/2012	15:23:46	7/25/2012	15:24:43	50
55917870000 121	7/12/2012	14:45:16	8/21/2012	12:56:44	50
55920450000 121	1/23/2012	09:45:52	1/23/2012	09:52:16	50
55920460000 121	1/23/2012	09:45:52	1/23/2012	09:52:16	50
91216950000 121	8/27/2012	05:38:32	8/27/2012	05:40:55	100


 Rows 1 - 25

Figure 48 – ID Numbers Without Commas

## In-House Loans Not Considered in Alma OTB Fulfillment Reports

In-house loans are items that were not actually loaned, but rather taken off the shelf by patrons and used in the library. The library can choose to keep track of these items in Alma, where they are marked as in-house loans. Previously, in-house loans were included in the OTB Fulfillment reports by default, although in most cases they were not meant to be included. Now, these reports are filtered by default to not include in-house loans, but can be modified if required.

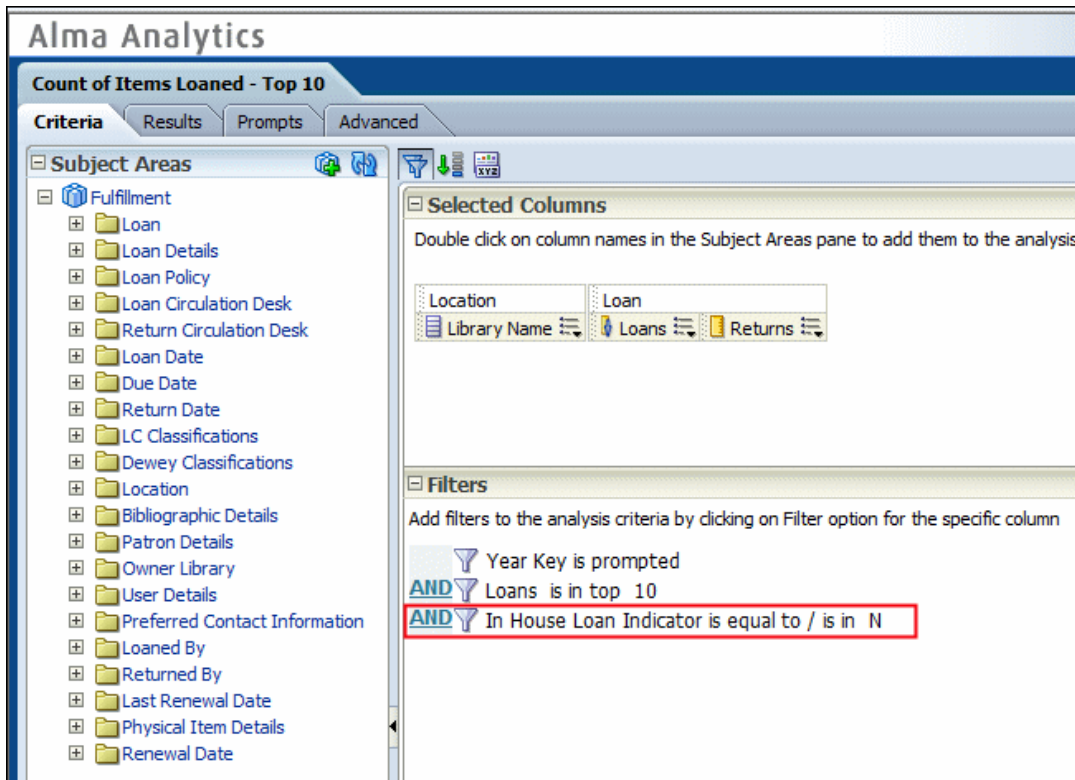


Figure 49 – In-House Loans Not Considered in Alma OTB Fulfillment Reports

## Enhancements to the Requests Subject Area

The following changes were made in the Requests subject area:

- A new date folder, **Request Completion Date**, was added. This is the date on which requests were completed and is relevant only for non-active requests (active = N).



Figure 50 – Request Completion Date

- The Library Unit folder and fields were renamed **Owning Library** to be consistent with Alma terminology.
- The **Request Fiscal Year** was added to the **Request Date** folder.

## Other Analytics Enhancements

- The User Name column was changed to **Primary Identifier** in all the areas in which it appears.

# Primo

The following section describes the functions provided for Primo in the July 2014 release of Alma.

## Publish Holdings Information to Primo

### Description

Alma now allows you to enrich your published records with additional holdings information. The Quick Add section has been added to the **Publish bibliographic records to Primo** publishing profile to allow you to map holdings fields to a MARC field in the published bibliographic record.

### Technical Instructions

The following roles can customize the Primo publishing profile:

- Catalog Administrator
- Repository Administrator
- General System Administrator

#### To add holdings enrichment information to the published record:

- 1 Access the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**).

- 2 Select **Actions** > **Edit** for the **Publish bibliographic records to Primo** built-in publishing profile.

**Publishing Profile Details** Cancel Save

**ⓘ** The Run full publishing option should not be selected after "go live" without prior written consent from third-line Support staff.  
**ⓘ** The predefined Electronic, Physical, and Digital options in the Content Options section should not be modified.

**Profile Details**

Profile name \* Publish bibliographic records to Primo

Profile description Setup the parameters for publishing bibliographic records to Primo

Run full publishing

Status  Active  Inactive

Scheduling Not scheduled Email Notifications

**Submission Format**

FTP configuration  Sub-directory

**Content Options**

Electronic

Physical

Digital

Collection

Course information enrichment

Related records information enrichment

**Physical Inventory Enrichment**

**+** Quick Add

Holding Tag	Holding Subfield	Bib Tag	Bib Subfield
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

No records were found.

Cancel Save

Figure 51 – Primo Publishing Profile Details

- 3 In the Physical Inventory Enrichment section, use the Quick Add area to map the holdings fields/subfields to the published bibliographic record and then click **Add**.

**Physical Inventory Enrichement**

**Quick Add**

Holding Tag      Holding Subfield      Bib Tag      Bib Subfield

**Add**

	↕ Holding Tag	↕ Holding Subfield	Bib Tag	Bib Subfield	
1	866	z	866	z	<b>Delete</b>
2	866	a	866	a	<b>Delete</b>

Figure 52 - Holdings Mappings Added

- 4 Click **Save**.

# Alma APIs

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

## Alma RESTful APIs

With the July release, it is now possible to update a bibliographic record using the following API:

- `PUT /bibs/{MMS_ID}`

For more information on this API, see <https://developers.exlibrisgroup.com/alma/apis/bibs>.

# Collaborative Networks and Multicampus Institutions

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

## Global Changes on Local Extensions for NZ-Linked Records

### Description

Alma has been enhanced to globally update local fields of NZ-linked records to enable the maintenance of local extensions. Refer to the illustration below for an example of a record that contains local extension content in an NZ-linked record.

LDR	00534nam#a2200157#u#4500
001	99133284000001021
005	20130220165851.0
008	130220s2012####xx#####r#####000#0#eng#d
245	0 1 \$\$a record with local data
591	\$\$a some data from NZ
591	\$\$a some local data
691	0 \$\$a some other data from NZ
691	0 \$\$a some other local data
906	\$\$a some data NZ added according to its configuration
949	\$\$a additional data NZ added according to its configuration
950	\$\$a some data locally added according to local configuration

Figure 53 - Local Extension Content in NZ-Linked Record

This enhancement has been implemented by using a **MARC 21 Bib Normalization** job to normalize NZ-linked records that contain local fields such as the 9XX fields. This job only makes changes to the local fields and saves them to the IZ. Since these are local changes, they are not distributed to the NZ or other members. Previously, these NZ-linked records were not processed; they were ignored.

This capability has been enabled by extending the functionality of the normalization drool (part of a normalization process) for records that are linked to the NZ. The normalization processes can be accessed/added on the **Normalization** tab of the Profile Details page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration > click MARC21 Bibliographic link**).

Profile Details				Back
Profile		MARC21 Bibliographic	Family	
Type		Bibliographic	Usage	
			BIB_MMS	
Fields	Normalization	Validation	Validation Exception Profile List	
Add Process				Tools
Active	Name	Description	Actions	
1	<a href="#">Add 245 with subfield h Journal</a>	Add 245 with subfield h Journal	Actions	
2	<a href="#">JEB test of syntax</a>	xx	Actions	
3	<a href="#">Marc21 Bib Initial Normalization</a>	Initial normalization for Marc21 Bib record	Actions	
4	<a href="#">Marc21 Bib normalize on save</a>	Normalize Marc 21 Bib while saving	Actions	
5	<a href="#">Marc21 Bib Re-sequence</a>	Marc21 Bib Re-sequence	Actions	
6	<a href="#">Marc21 Bib Re-sequence And Clea</a>	Marc 21 Bib Re-sequence and clear empty fields	Actions	
7	<a href="#">move 001 to 009 and create new 00</a>	move 001 to 009 and create new 001	Actions	
8	<a href="#">remove 975 process</a>	removes 975 process	Actions	
9	<a href="#">Remove Vendor Data 949</a>	Remove vendor 949 field from MARC	Actions	
10	<a href="#">Remove Vendor Data 980 981 993</a>	Remove vendor 980, 981 and 993 fields from MARC	Actions	
11	<a href="#">Run a normalization rule on a set (</a>	This should allow any user to run an established normalization rule on an establ...	Actions	
12	<a href="#">stom</a>	stom	Actions	
13	<a href="#">Suppress Bib records from discover</a>	Marks MMS records as suppressed or non-suppressed from discovery	Actions	
14	<a href="#">Synchronize Bib records with exter</a>	Marks MMS records for synchronization or no-synchronization with external catalo...	Actions	
15	<a href="#">test EXL remove 975 process</a>	test EXL remove 975 process	Actions	

Figure 54 - Normalization Tab for MARC21 Bibliographic Processes

## Technical Instructions

The following roles can run a batch job to make global changes on local extensions on NZ-linked records:

- Catalog Manager
- Catalog Administrator
- Repository Manager

**Note:** Prerequisites for running the batch job procedure described below include:

- 1) Creating a normalization process for the purpose of adding local extensions to NZ-linked records. Refer to the **To add a process** procedure in the **Working with Normalization Processes** section of the Alma online help and/or *Alma Resource Management Guide* for instructions regarding how to do that.
- 2) Creating the normalization rule to be selected for the **Drools File Key** parameter in the MARC Drool Normalization section of the normalization process you create in the above prerequisite and that displays later as the default for the **Drools File Key** parameter in the MARC Drool Normalization section of the **Run a Job** wizard. Refer to the **To create a new normalization rule file** procedure in the **Working with Normalization Rules** section of the Alma online help and/or *Alma Resource Management Guide* for instructions regarding how to create a normalization rule.
- 3) Creating/saving the set of records to be updated by the **MARC 21 Bib Normalization** process.

To run a batch job to make global changes on local extensions on NZ-linked records:

- 1 Click **Run a Job** (**Administration > Manage Jobs**).
- 2 Select **MARC 21 Bib Normalization** from the **Type** filter drop-down list.
- 3 Select the normalization process that you created for this purpose and click **Next**.
- 4 Select the set of records to be processed for this purpose and click **Next**.
- 5 Confirm that the normalization rule that defaults for the **Drools File Key** is the preferred rule for this job.

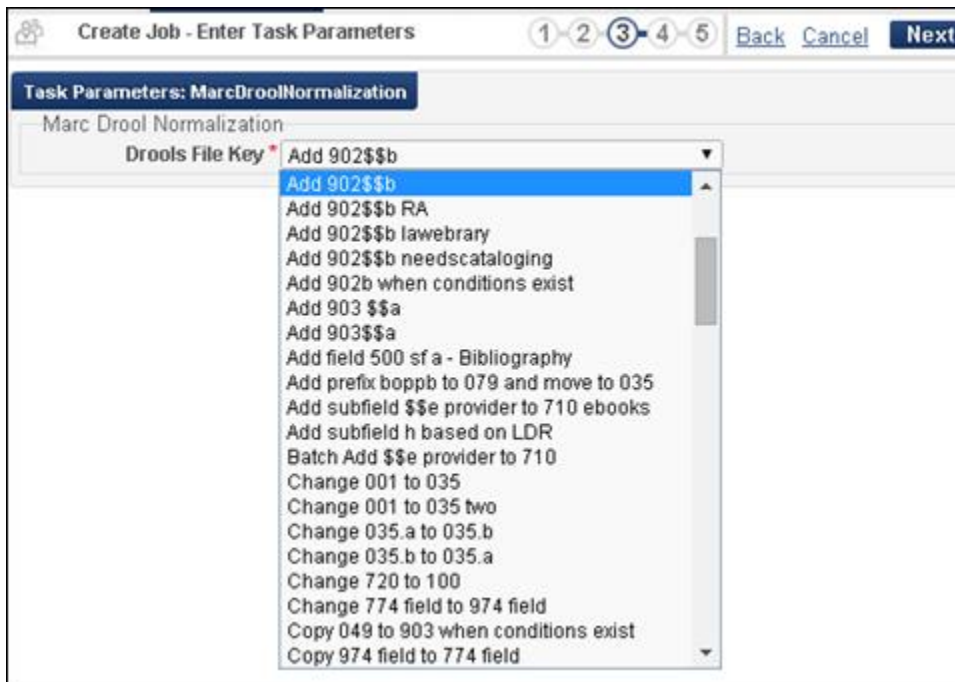


Figure 55 - Confirm Drools File Key Option

- 6 Click **Next** and complete the remainder of the job request as you normally would.

## Central Publishing to Primo – Republishing Sets

### Description

Alma has added the following Primo publishing jobs for customers who are using centralized publishing from the Network Zone:

- **Mark records to be republished by NZ job** – This job allows member institutions in the Institution Zone (IZ) to mark a set of records to be republished to Primo by the **Publish bibliographic record from Network Zone to Primo** job, which runs on the Network Zone

(NZ). The implementation version of this job allows you to run a separate job for a test environment.

- **Network Zone Republish Set of Titles** – This job allows the NZ to republish a set of records to Primo. The implementation version of this job allows you to run a separate job for a test environment.

To simplify the centralized publishing process, only relevant publishing processes/jobs display for each zone as shown in the tables below.

The following table lists the availability of the publishing profiles for each zone:

Publishing Profile	NZ	Member (IZ)
Publish bibliographic record from Network Zone to Primo	Yes	No
Publish bibliographic record from Network Zone to Primo process – Implementation	Yes	No
Publish bibliographic records to Primo	N/A	hidden

The following table lists the availability of the publishing jobs for each zone:

Publishing Job	NZ	Member (IZ)
Network Zone Republish Set of Titles	Yes	No
Network Zone Republish Set of Titles (impl)	Yes	No
Mark records to be republished by NZ job	No	Yes
Mark records to be republished by NZ job (impl)	No	Yes
Primo Republish Set of Titles	N/A	hidden

---

**Note:** If a member institution needs to publish records directly to Primo, you can display the hidden jobs by setting a customer parameter.

---

## Technical Instructions

The following roles can run the publishing jobs:

- Catalog Administrator
- Repository Administrator
- General System Administrator

The following role can configure the relevant customer parameter:

- General System Administrator

### To mark a set of records for republishing at a member institution:

- 1 Create a set of bibliographic, physical, digital, or electronic titles. Sets are defined on the Manage Sets page.
- 2 Click **Run a Job** under **Administration > Manage Jobs**. The Create Job – Select Job to Run page opens.
- 3 Use the **Type** filter to display only the publishing jobs.



Figure 56 – Create Job – Select Job to Run Page

- 4 Select the row that contains the **Mark records to be republished by NZ job** process, and click **Next**. The Create Process - Select Set page opens.
- 5 Select the set that you created in Step 1, and click **Next**. The Create Process - Enter Task Parameters page opens.
- 6 Click **Next**. The Create Process - Process Details and Schedule page opens.
- 7 Enter a name (required) and select a schedule for the process.
- 8 Click **Next**. The Create Process - Review and Confirm page opens.
- 9 Click **Save** to save the process definition, which will run according to the selected schedule. You can monitor the progress of the process on the Monitor Jobs page (see **Monitoring Jobs** in the online help).

### To republish a set of records at the NZ:

- 1 Create a set of bibliographic, physical, digital, or electronic titles. Sets are defined on the Manage Sets page.

- 2 Click **Run a Job** under **Administration > Manage Jobs**. The Create Job – Select Job to Run page opens.
- 3 Use the **Type** filter to display only the publishing jobs.



Figure 57 – Create Job – Select Job to Run Page

- 4 Select the row that contains the **Network Zone Republish Set of Titles** process, and click **Next**. The Create Process - Select Set page opens.
- 5 Select the set that you created in Step 1, and click **Next**. The Create Process - Enter Task Parameters page opens.
- 6 Click **Next**. The Create Process - Process Details and Schedule page opens.
- 7 Enter a name (required) and select a schedule for the process.
- 8 Click **Next**. The Create Process - Review and Confirm page opens.
- 9 Click **Save** to save the process definition, which will run according to the selected schedule. You can monitor the progress of the process on the Monitor Jobs page (see **Monitoring Jobs** in the online help).

#### To display the hidden publishing profiles and jobs:

- 1 On the CustomerParameters mapping table (**Administration > General Configuration > Configuration Menu > General Configuration > Other Settings**) locate the **hide\_primo\_publishing\_options\_for\_network\_member** parameter.
- 2 Click **Customize** to allow the field to be modified.
- 3 Set the **Parameter Value** field to **false**.
- 4 Click **Save** to display the hidden publishing processes and jobs in the member institution.

## Campus Level Z39.50 Server Connection

With the Alma July release, it is now possible to define a Z39.50 client connection with Alma that supports filtering by campus. This is done by adding the Alma campus code to the client connection that is specified using the following format:

```
base <institution ID>/<campus code>
```

For example, `base 01UNIV_INST/Springfield` would be the client connection specified where:

`01UNIV_INST=Alma institution code`

`Springfield=Alma campus code`

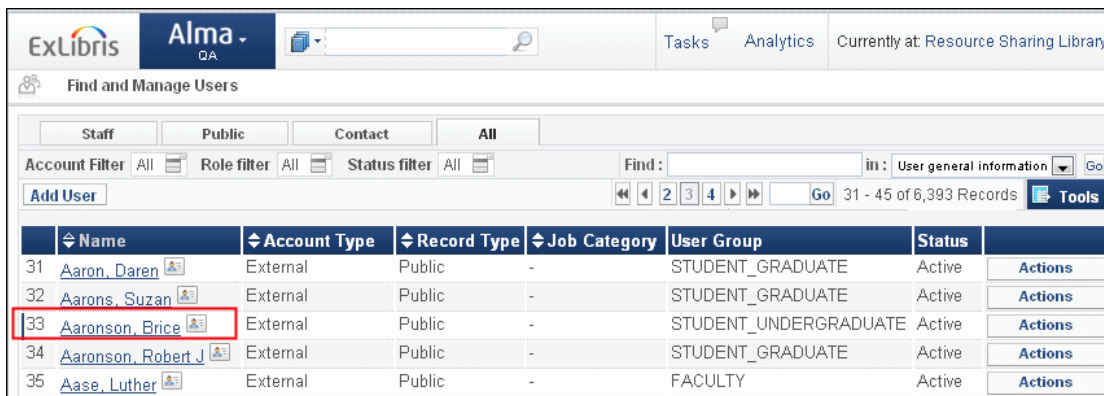
When this is implemented, Z39.50 search and present results will be displayed/filtered only for resources that are owned by the campus (and its libraries). This enables institutions in a multicampus environment to provide results that belong only to libraries identified within the selected campus.

# Alma Interface Updates

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

## Last Item Edited Indicator

After editing an item in a list and returning to the list, the page automatically scrolls to the item that you were working on and a bar is displayed next to the item. For example:



The screenshot shows the Alma interface for 'Find and Manage Users'. The table below lists user records. The row for 'Aaronson, Brice' is highlighted with a red box, indicating it is the last item edited.

	Name	Account Type	Record Type	Job Category	User Group	Status	Actions
31	<a href="#">Aaron, Daren</a>	External	Public	-	STUDENT_GRADUATE	Active	Actions
32	<a href="#">Aarons, Suzan</a>	External	Public	-	STUDENT_GRADUATE	Active	Actions
33	<a href="#">Aaronson, Brice</a>	External	Public	-	STUDENT_UNDERGRADUATE	Active	Actions
34	<a href="#">Aaronson, Robert J</a>	External	Public	-	STUDENT_GRADUATE	Active	Actions
35	<a href="#">Aase, Luther</a>	External	Public	-	FACULTY	Active	Actions

Figure 58 – Last Item Edited Indicator

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**Note:** This feature currently works for most of the lists in Alma.

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## Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.