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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
  - Fulfillment
  - Administration
  - Resource Sharing
  - Analytics
  - Primo
  - 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 6th 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.

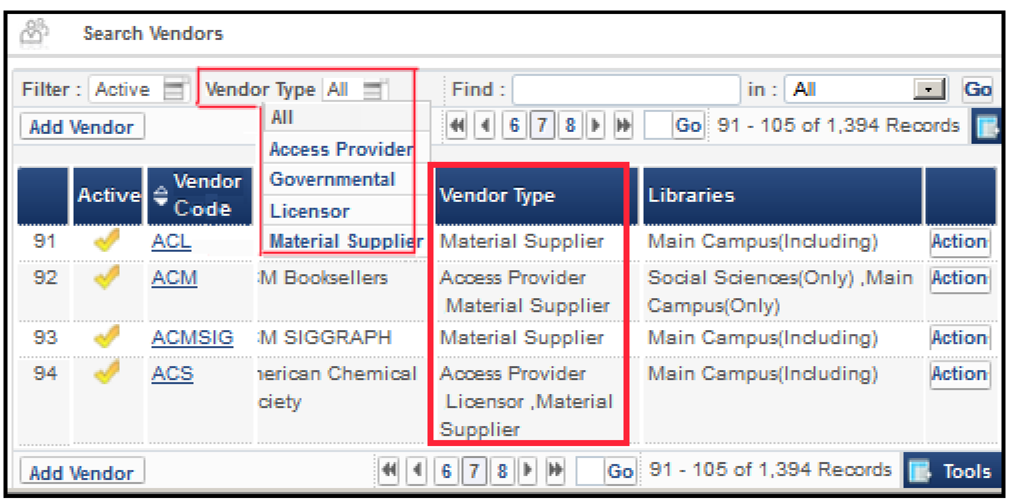



**Figure 1 - Vendor Type Field and Filter**

### *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.

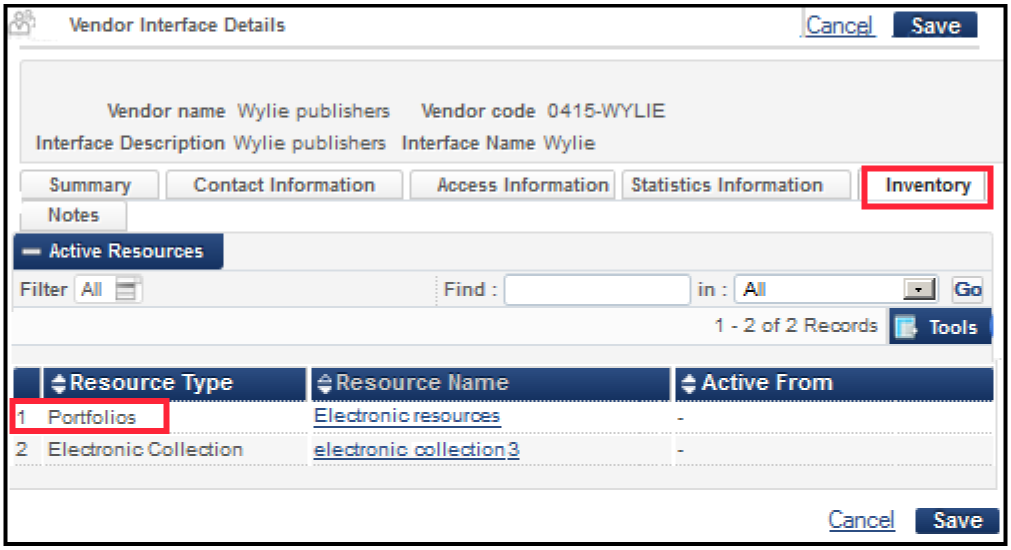



**Figure 2 - Portfolios Listed as Active Resources**

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.

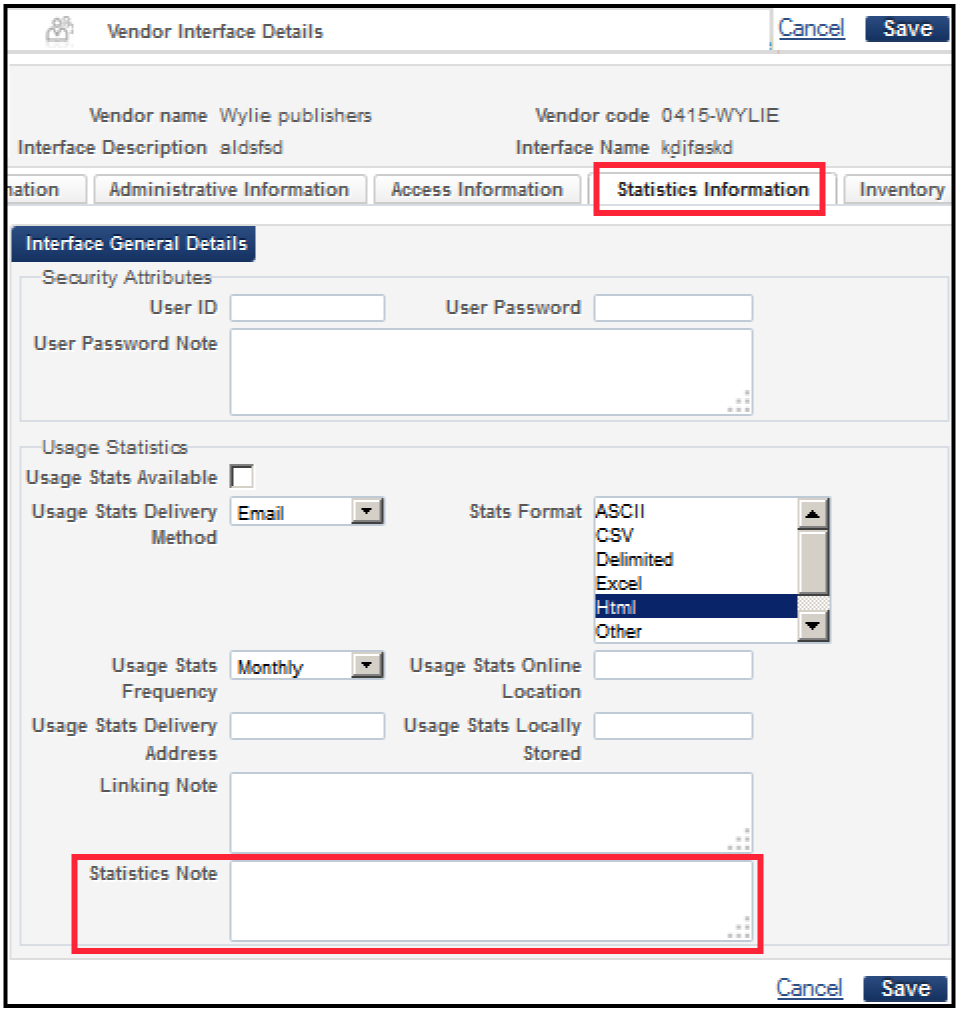



**Figure 3 - New Statistics Note Field on Vendor Interface Details Page**

### *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.

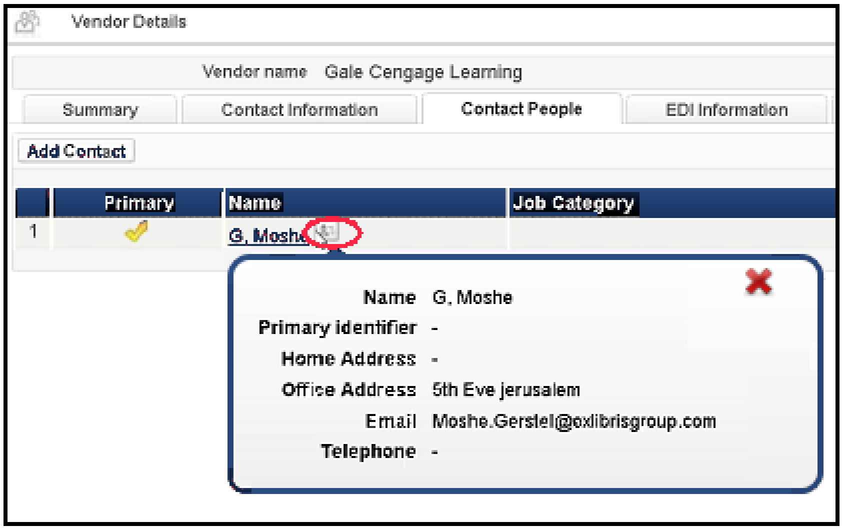



**Figure 4 - Contact Pop-Up Card with Email Link**

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).

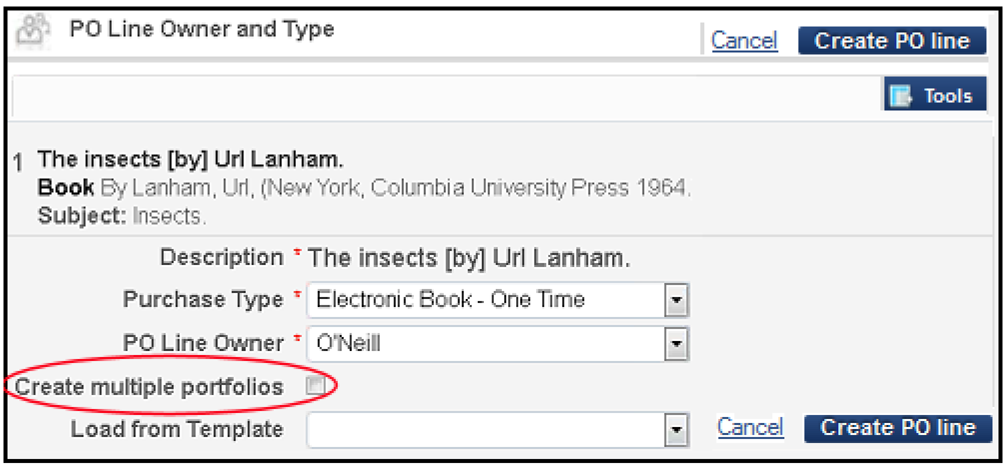



**Figure 5 - Create multiple portfolios check box**

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).

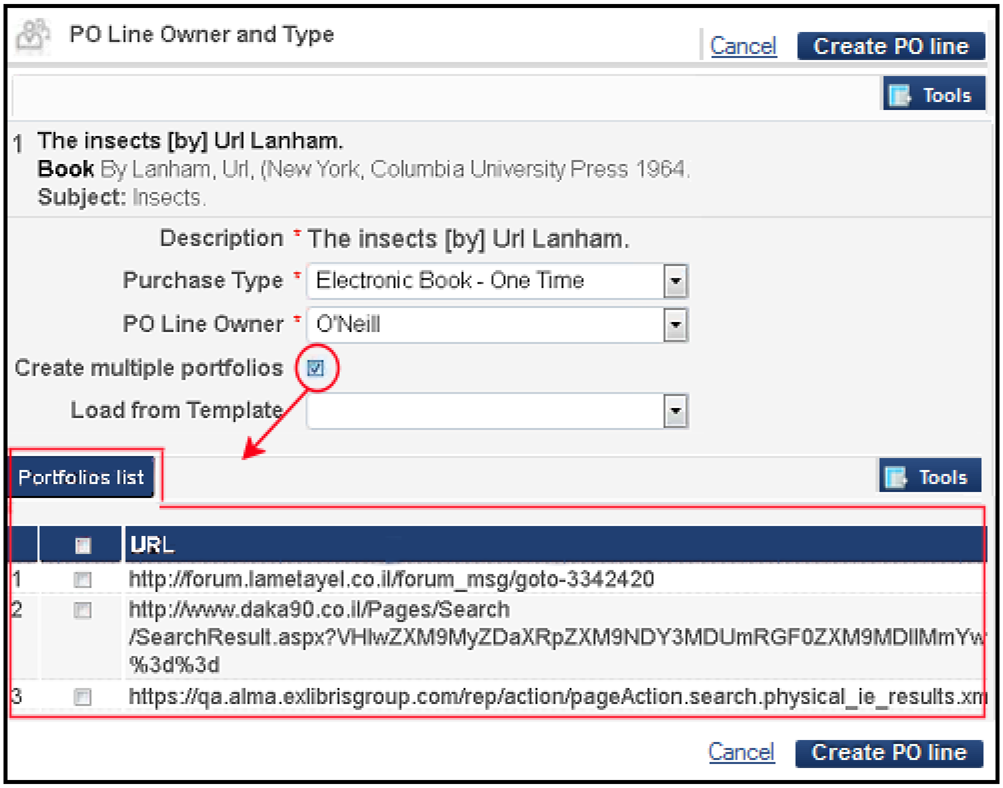



**Figure 6 - List of Portfolio URLs**

3 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**.

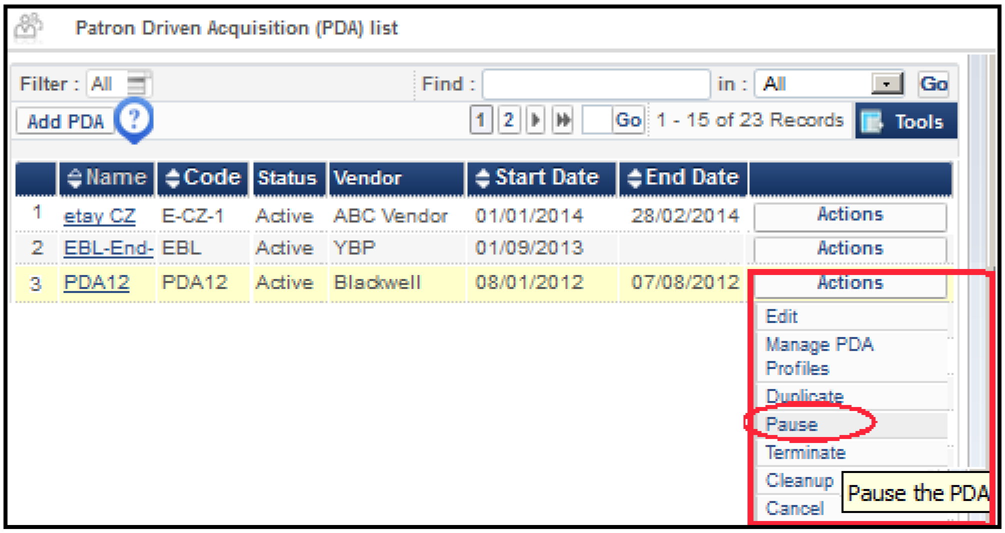



**Figure 7 - PDA Pause Action**

The following confirmation box opens.

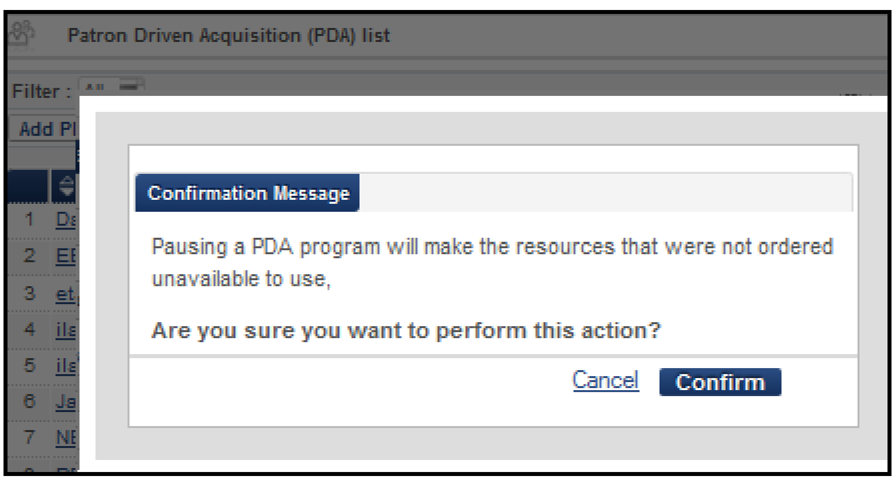



**Figure 8 - Confirmation to Pause PDA**

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**.

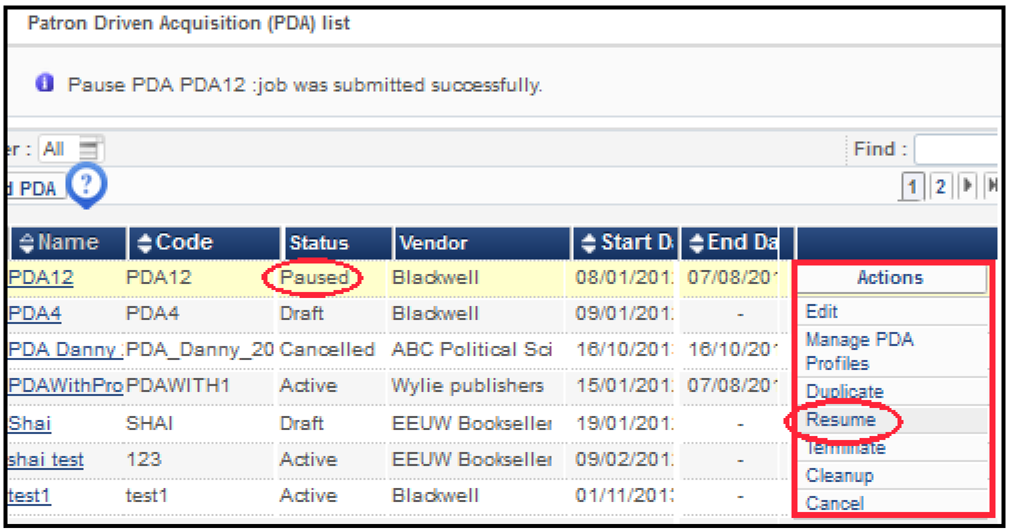



**Figure 9 - PDA Resume Selection**

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.

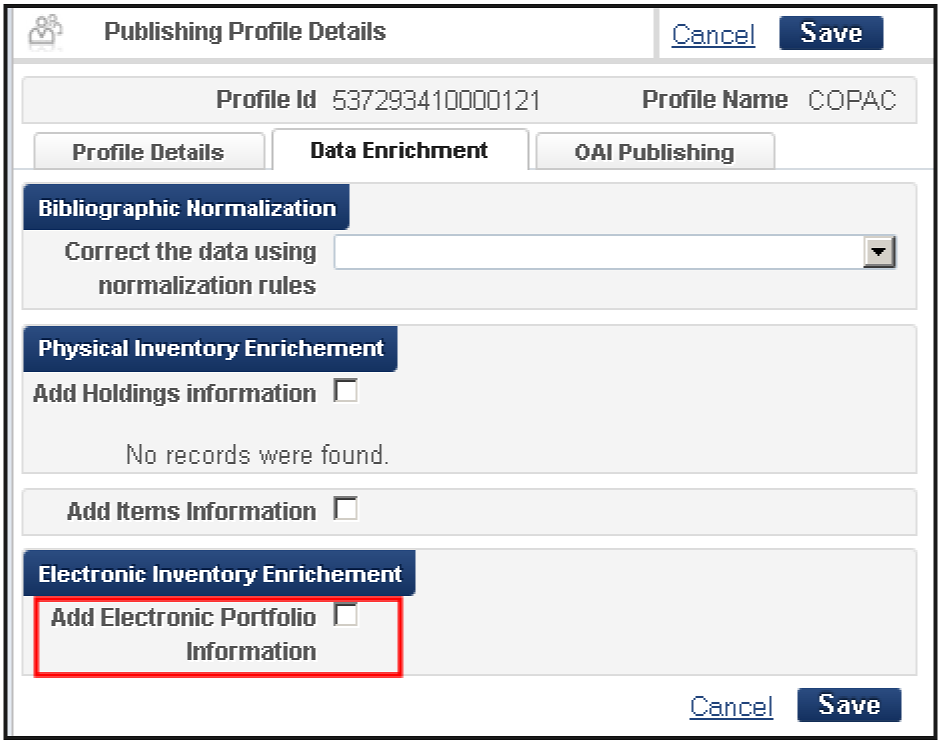



**Figure 10 - Data Enrichment Tab**

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

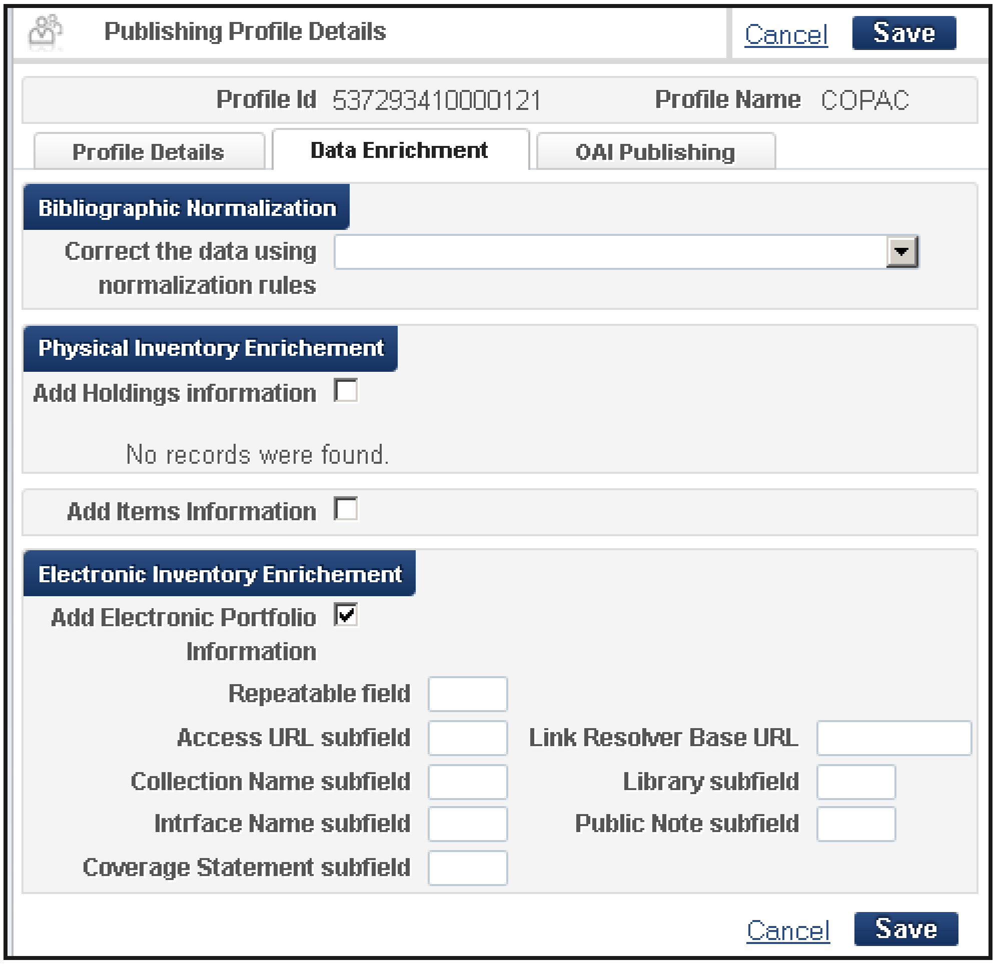



**Figure 11 – Electronic Inventory Enrichment Section Expanded**

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.<br>**Note:** If you specify this field, you must enter the **Link Resolver Base Resolver** 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:<br>`http://<primo server host:port>/openurl/<primo institution_code>/<primo view_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.

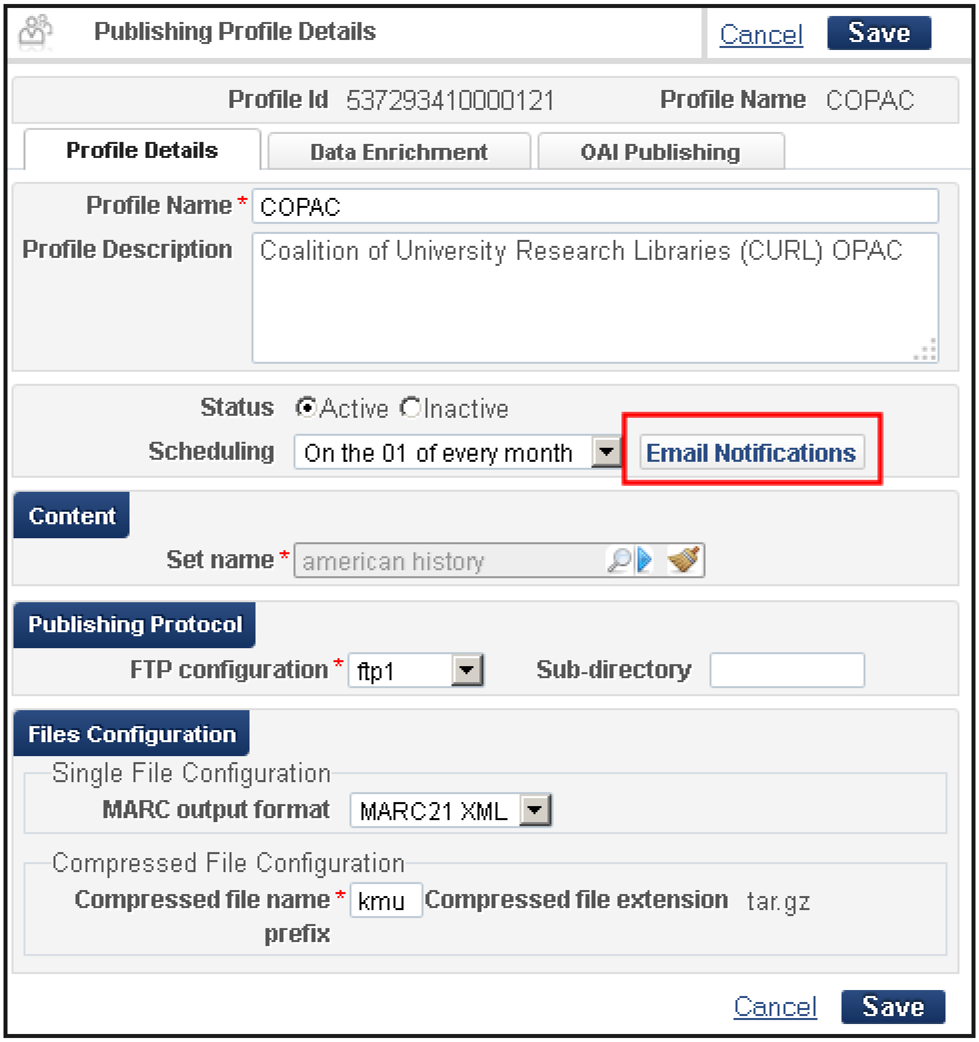



**Figure 12 – Profile Details Tab**

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

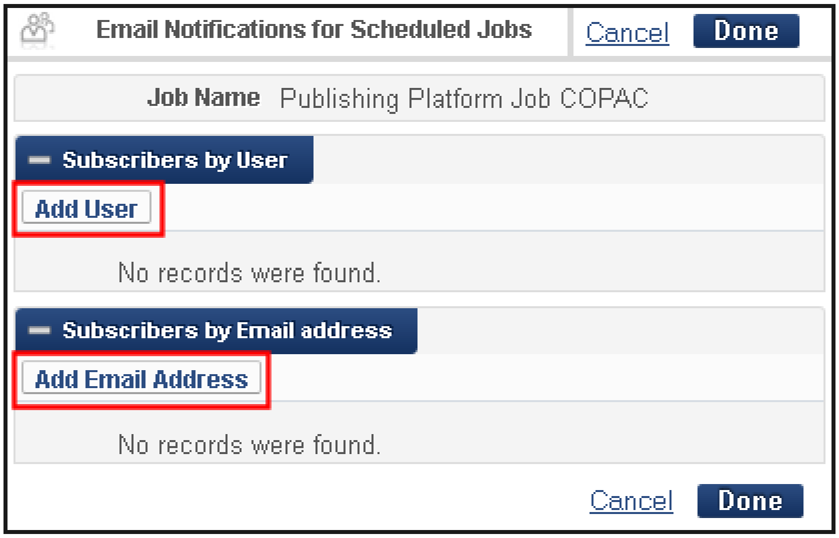



**Figure 13 – Email Notifications for Scheduled Jobs Page**

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

a Click **Add User**.

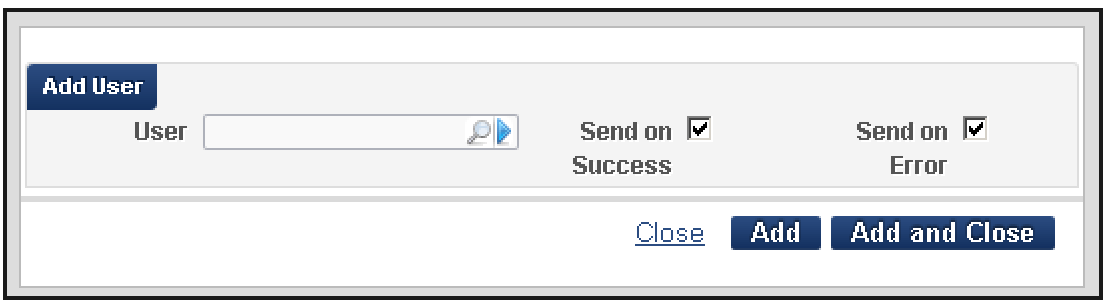



**Figure 14 – Add User Dialog Box**

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**.

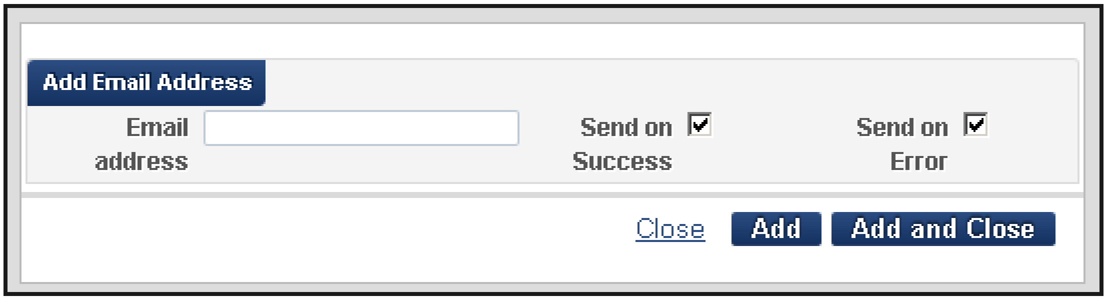



**Figure 15 – Add Email Address Dialog Box**

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).

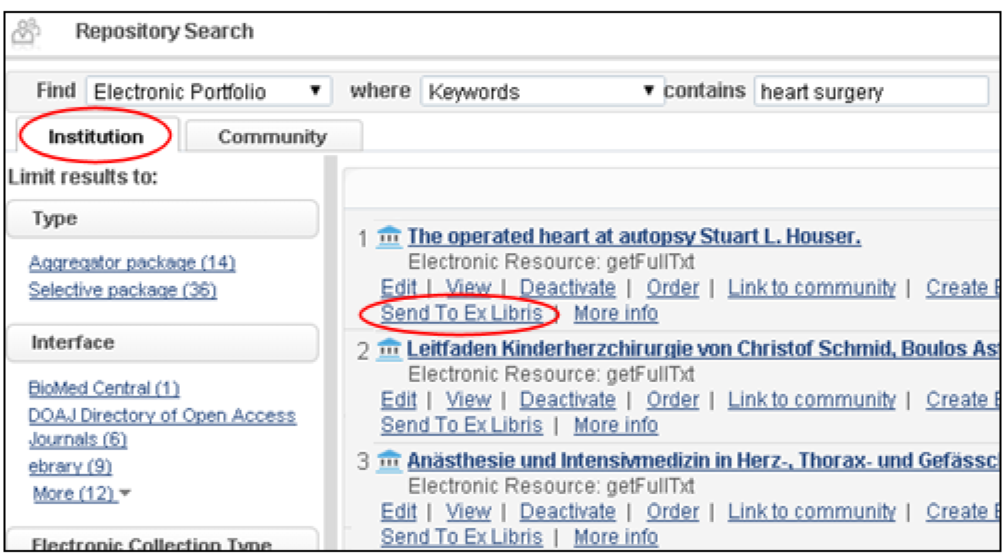



**Figure 16 - Send to Ex Libris Search Results Action on the Institution Tab**

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.

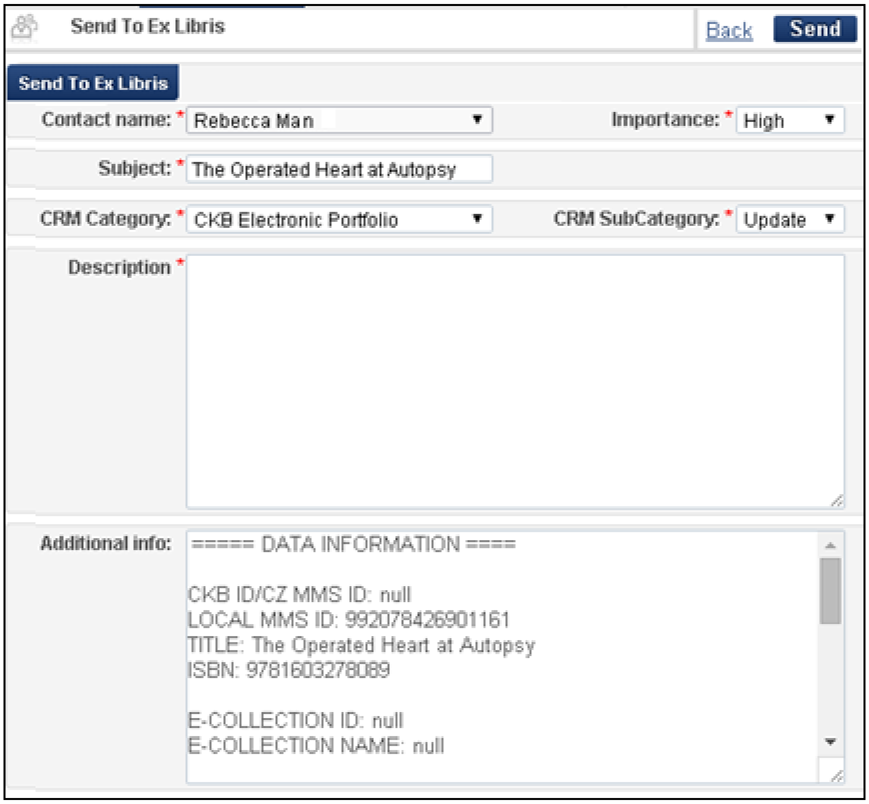



**Figure 17 - Send to Ex Libris Page**

# 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.

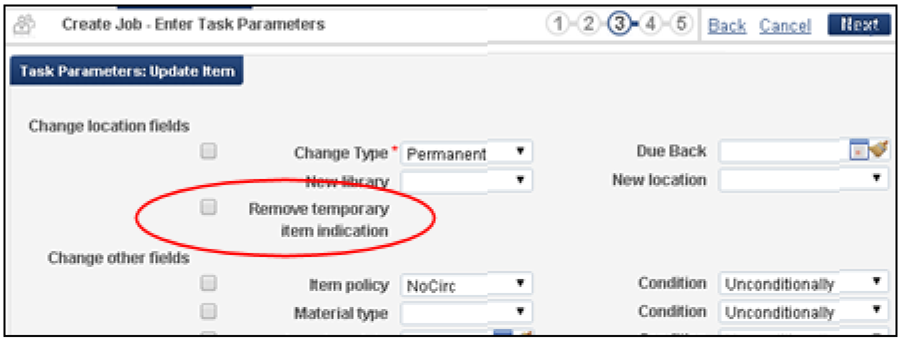



Figure 18 - Remove Temporary Item Indication Parameter

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.

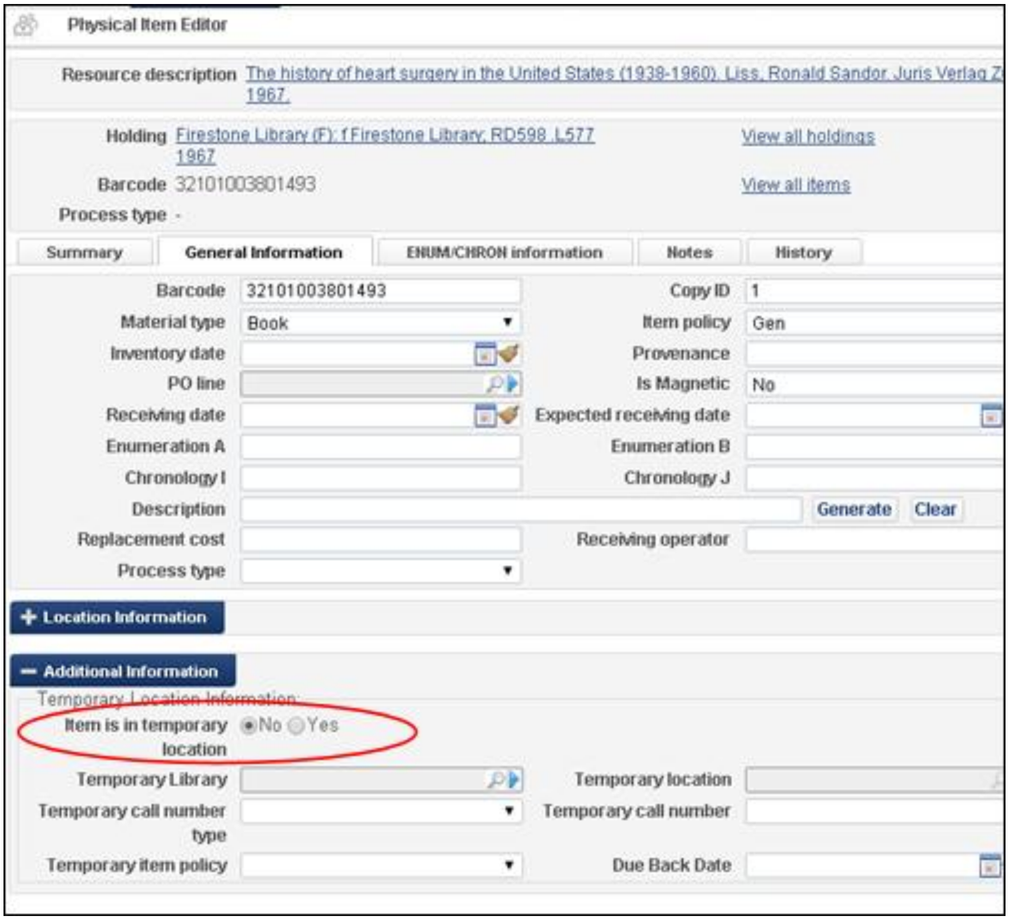



**Figure 19 - Item is in Temporary Location Parameter Set to No**

## 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**.

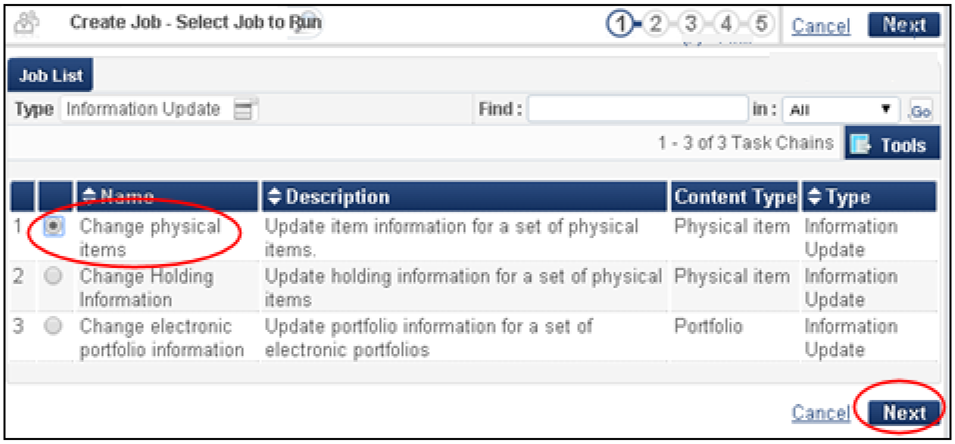



**Figure 20 - Select Change Physical Items and Click Next**

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.

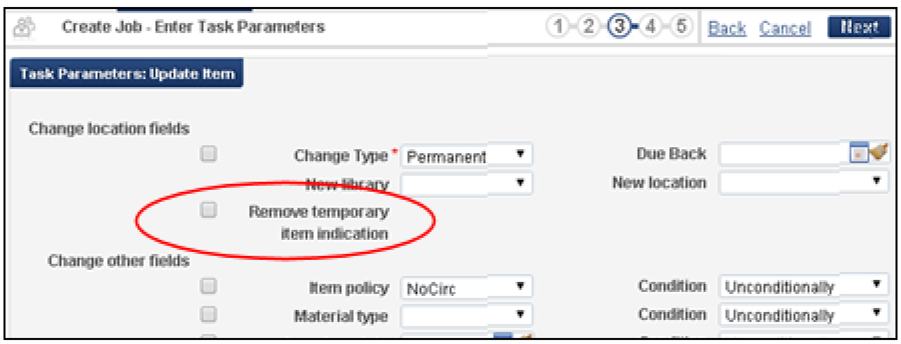



**Figure 21 - Remove Temporary Item Indication Option**

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.

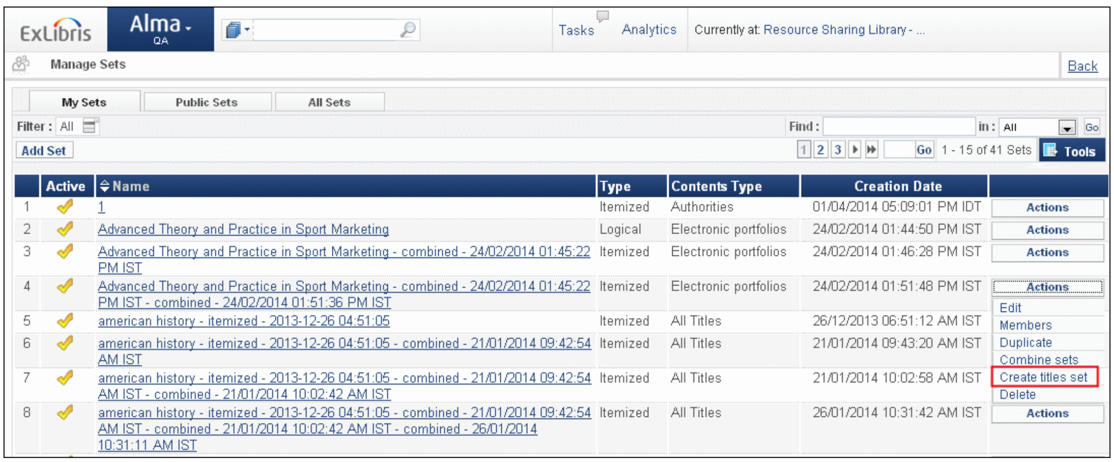



**Figure 22 – Create Title Set**

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.

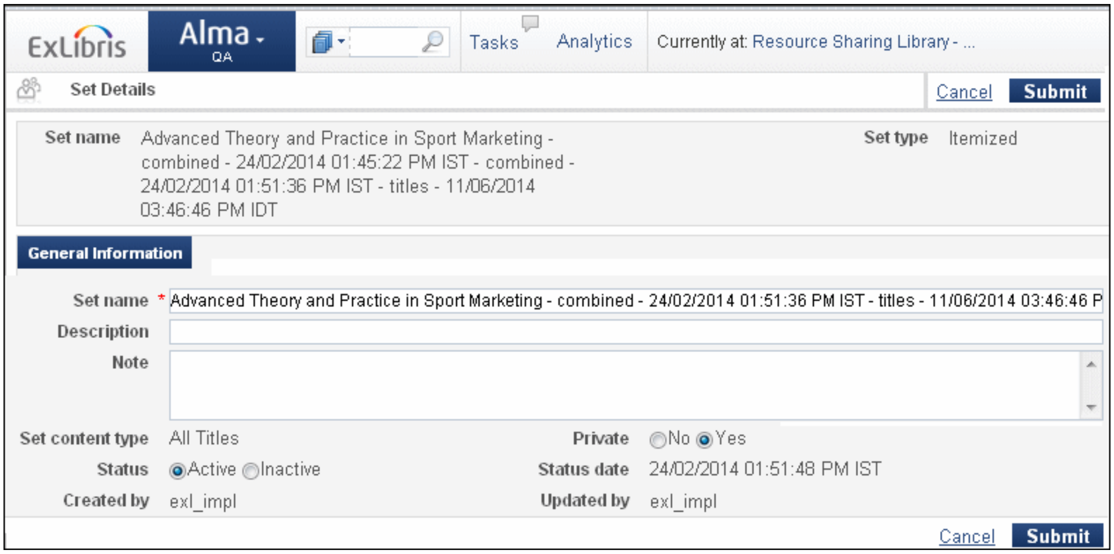



**Figure 23 – Set Details Page**

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

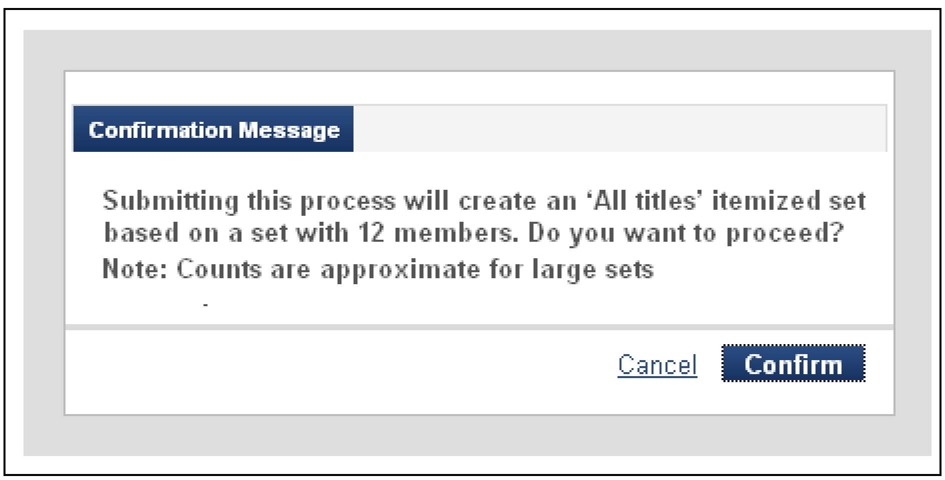



**Figure 24 – Confirmation Message**

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.

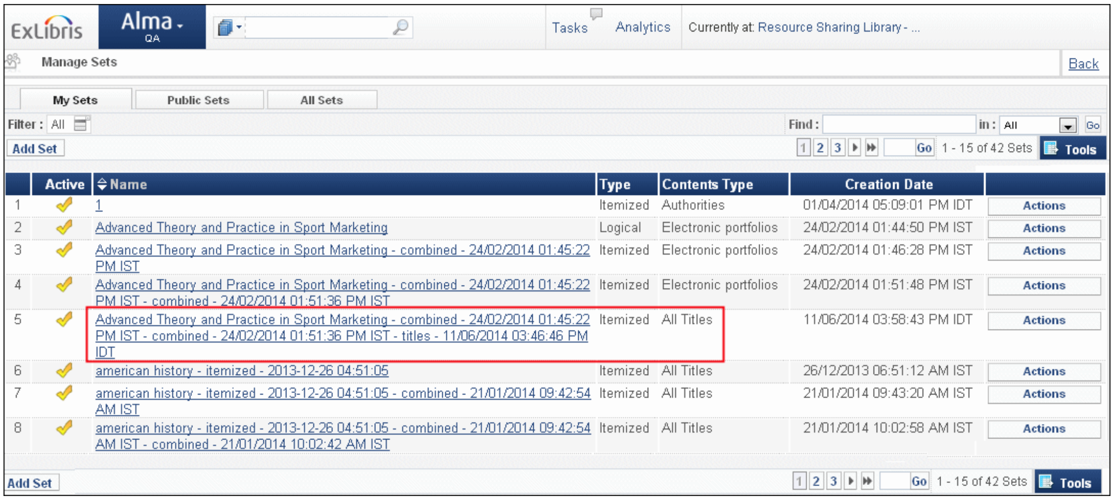


**Figure 25 – New Titles Set**

# 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.

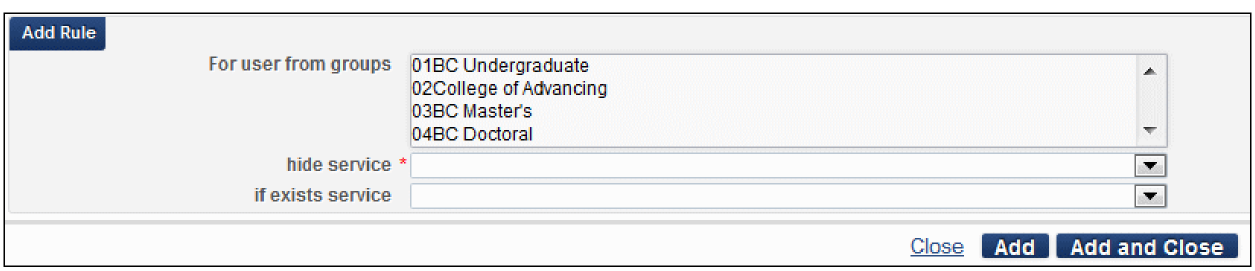



**Figure 26 – Add Rule Dialog Box**

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.

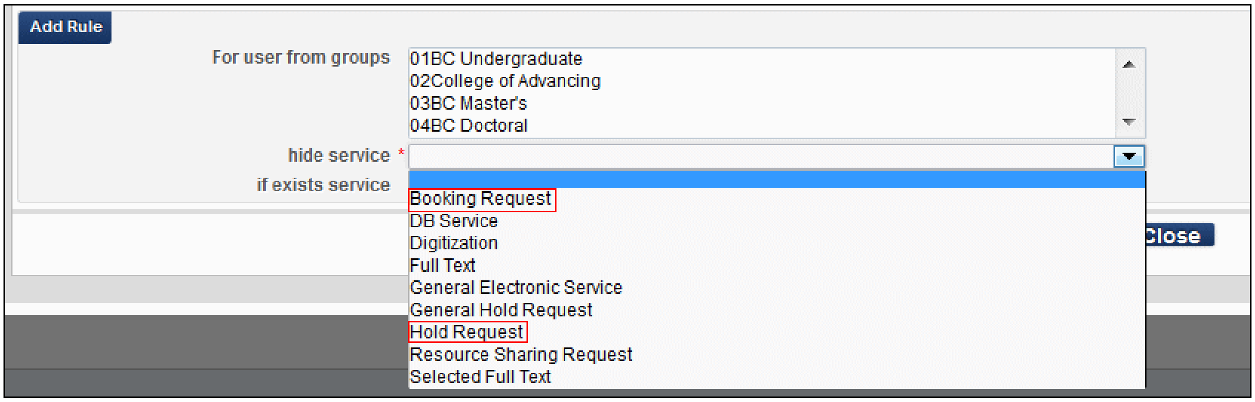



**Figure 27 – Add Rule Dialog Box — Booking Request and Hold Request Options**

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.

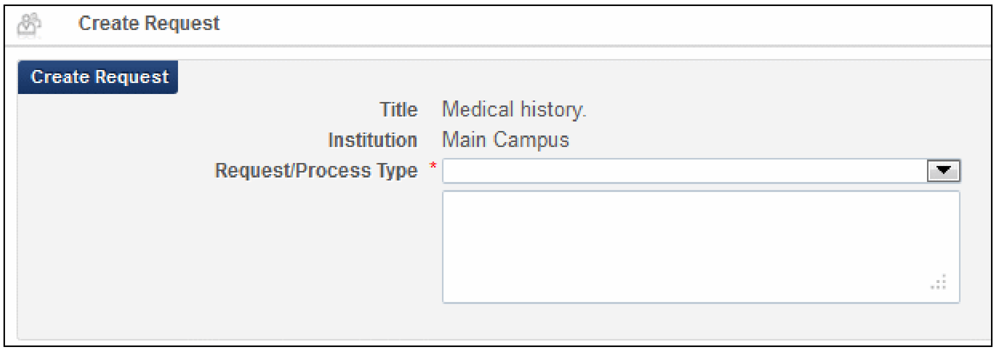



**Figure 28 – Create Request Page**

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

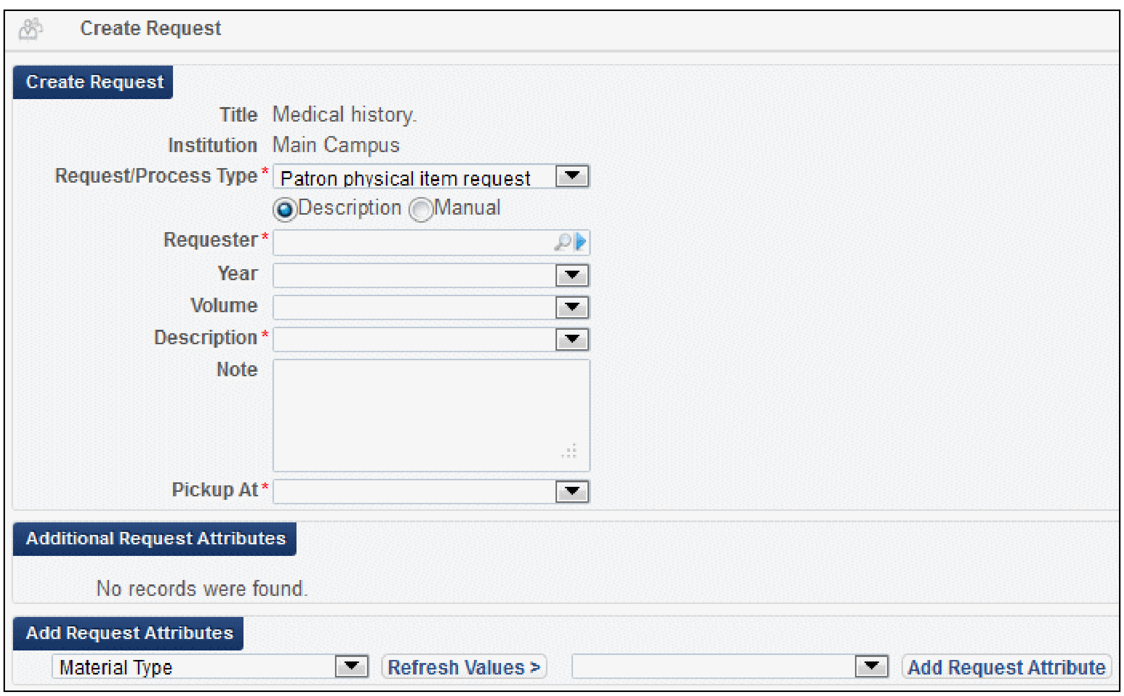



**Figure 29 – Create Request Page with Additional Fields**

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.

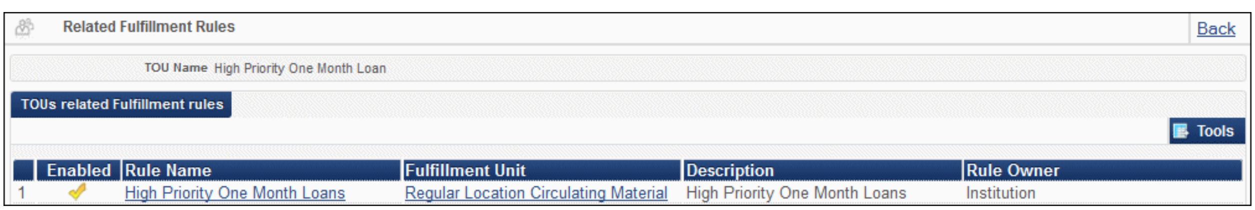



**Figure 30 – Related Fulfillment Rules Page**

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.


**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.

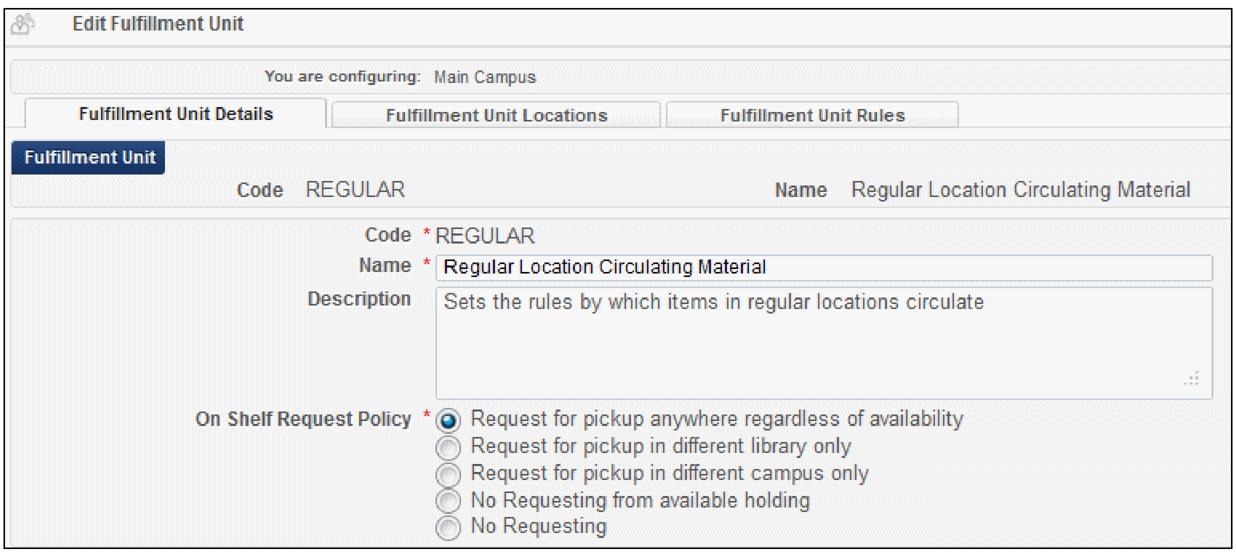



**Figure 32 – Edit Fulfillment Unit Page**

## 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).

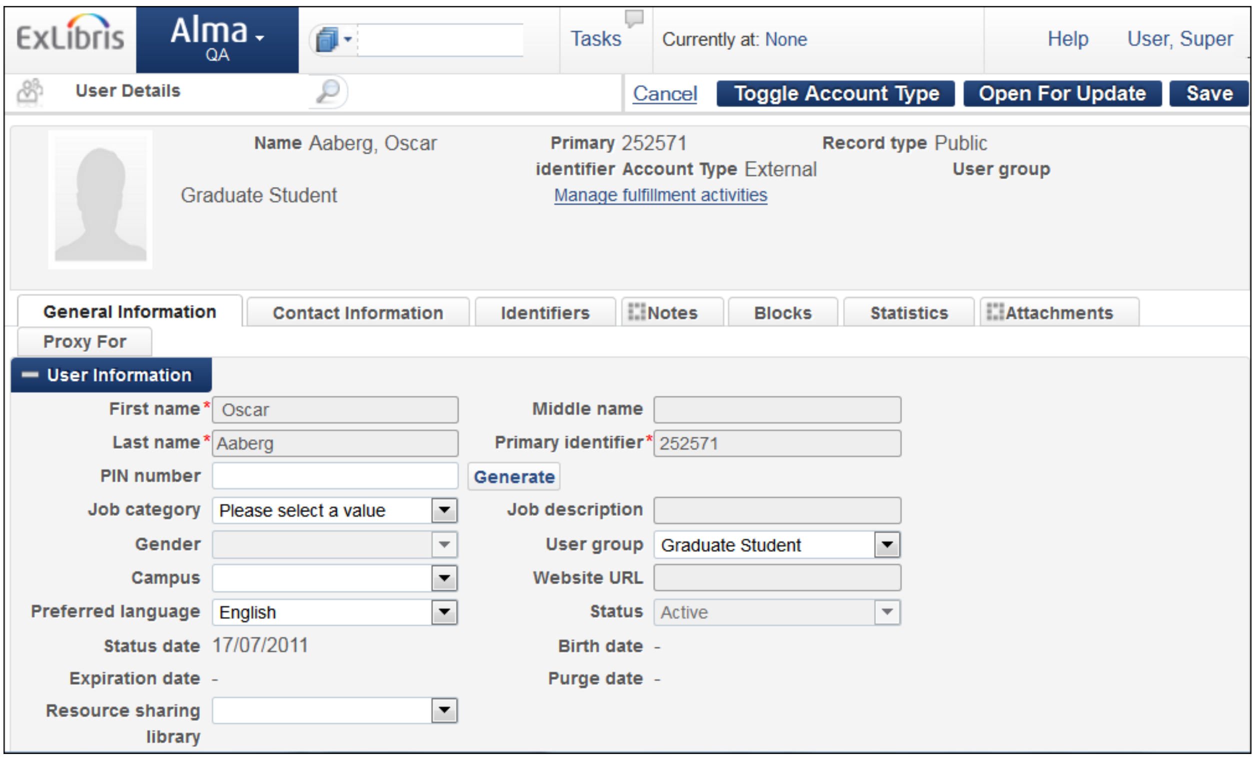



**Figure 33 – User Details – Toggle Account Type**

## 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.

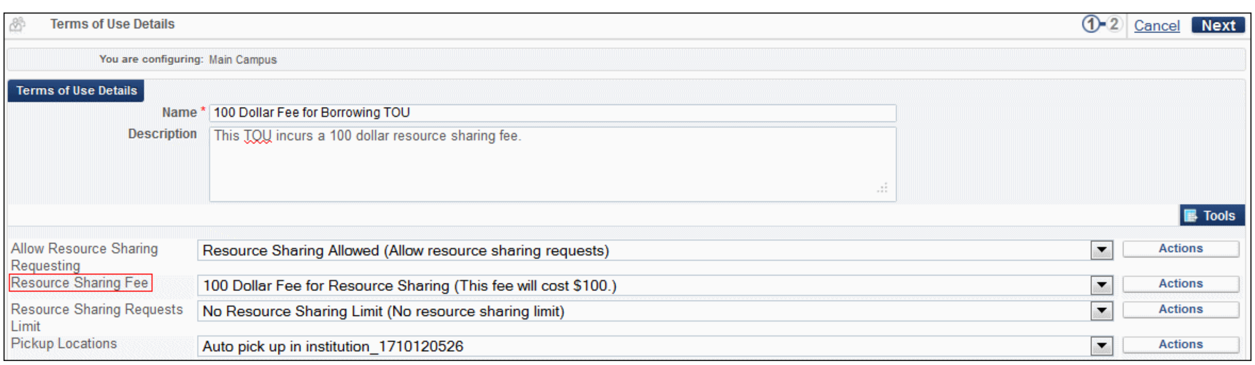



**Figure 34 – Terms of Use Details Page**

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.

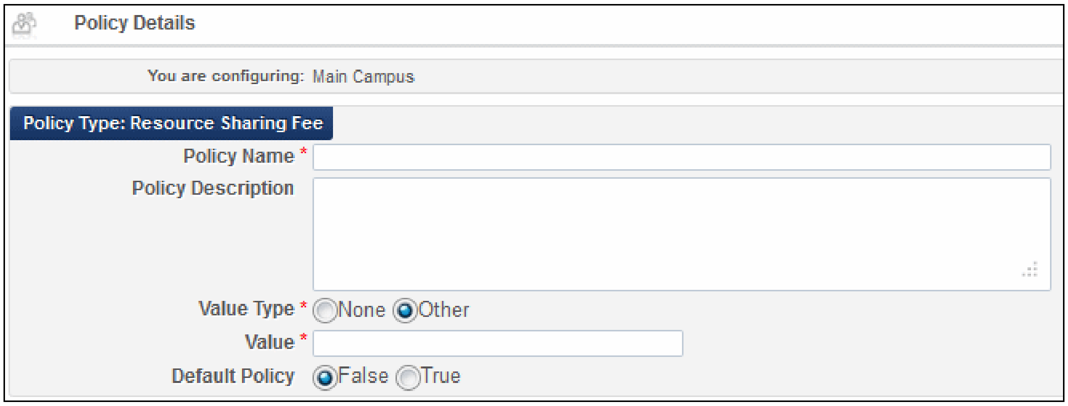



**Figure 35 – Policy Details Page**

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:

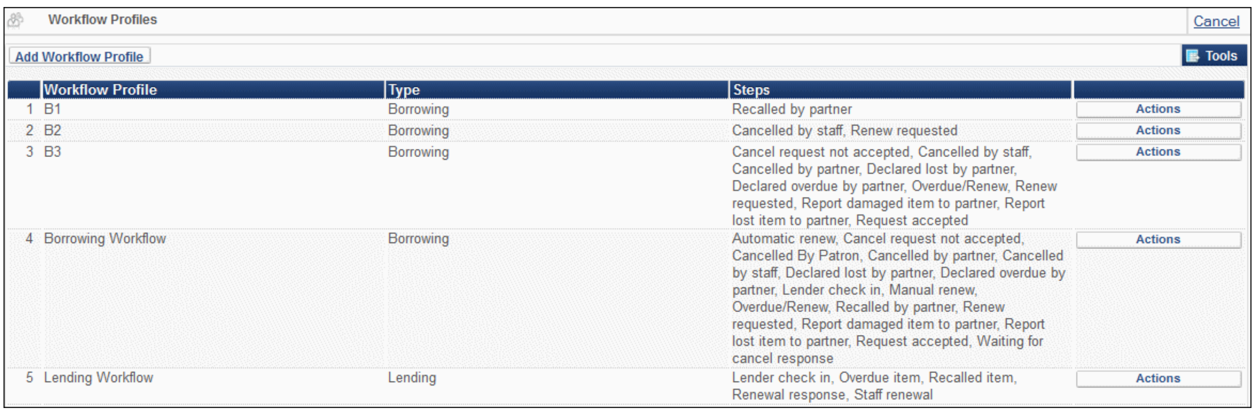
- General System Administrator
- Fulfillment Administrator

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 | |
|---|---|---|---|---|
| 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.

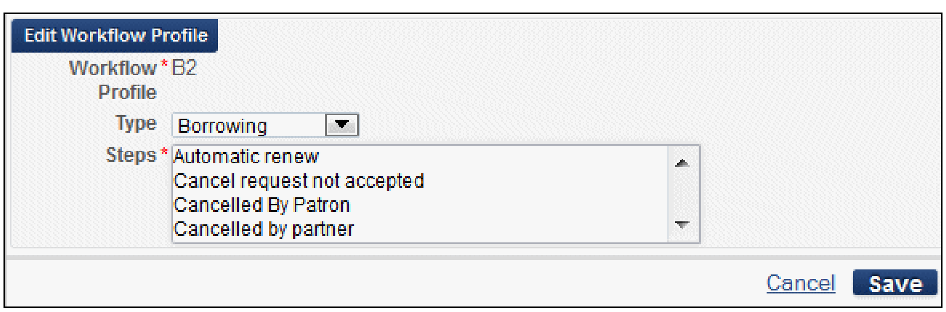



**Figure 37 – Edit Workflow Profile Dialog Box**

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**.

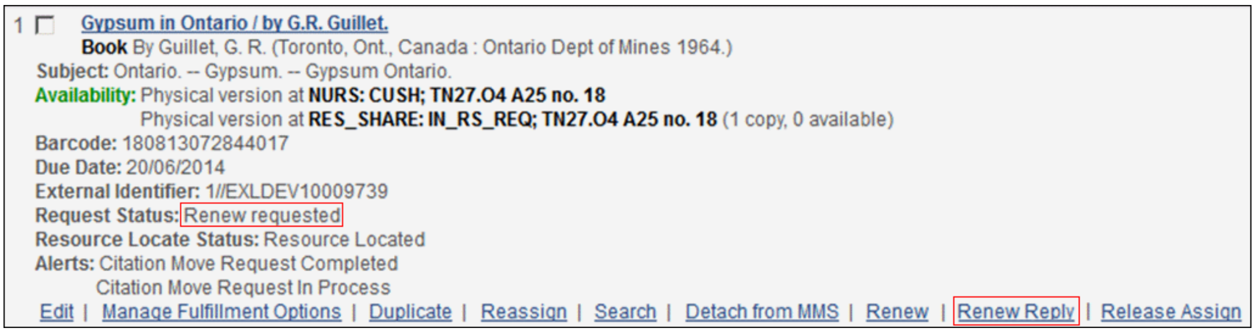



**Figure 38 – Resource Sharing Borrowing Requests Page — Renew Requested Status and Renew Reply Link**

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

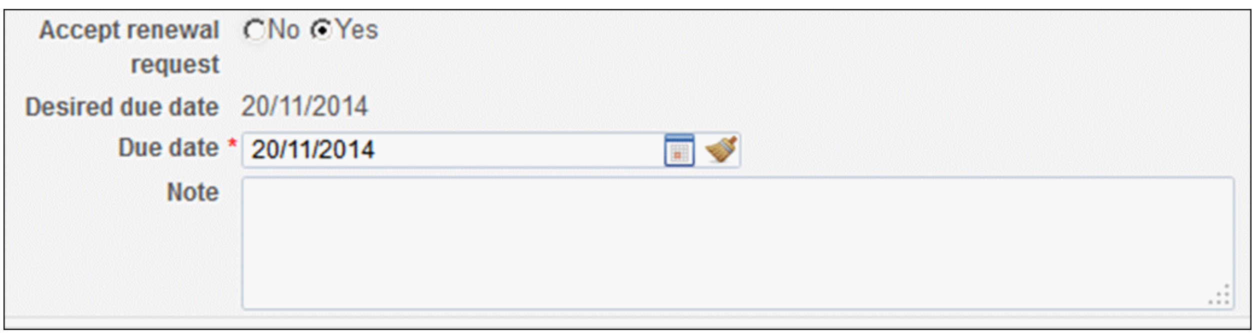



**Figure 39 – Accept Renewal Request Dialog Box**

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**.


**Figure 40 – Resource Sharing Borrowing Requests Page — Renew Link**

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

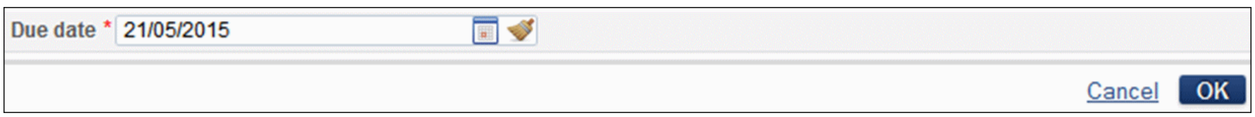



**Figure 41 – Due Date Dialog Box**

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: YBP LIBRARY SERVICES (YANKEE)/ YBP LIBRARY SERVICES (YANKEE) |
| 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.

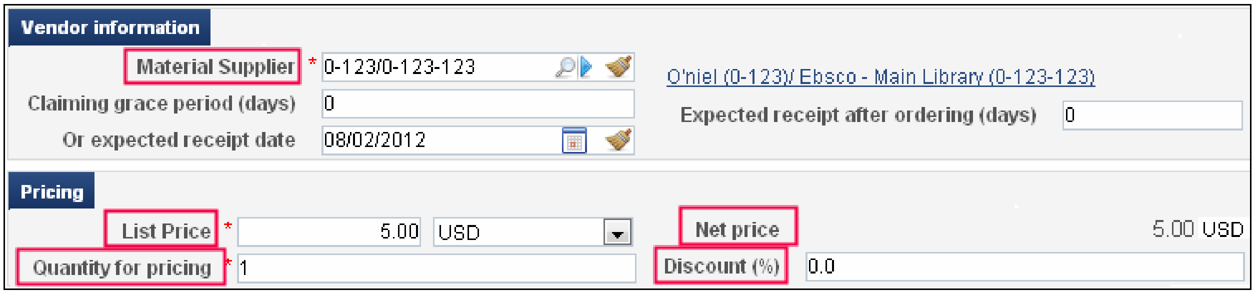



**Figure 42 – PO Line Summary Page – Vendor Information and Pricing**

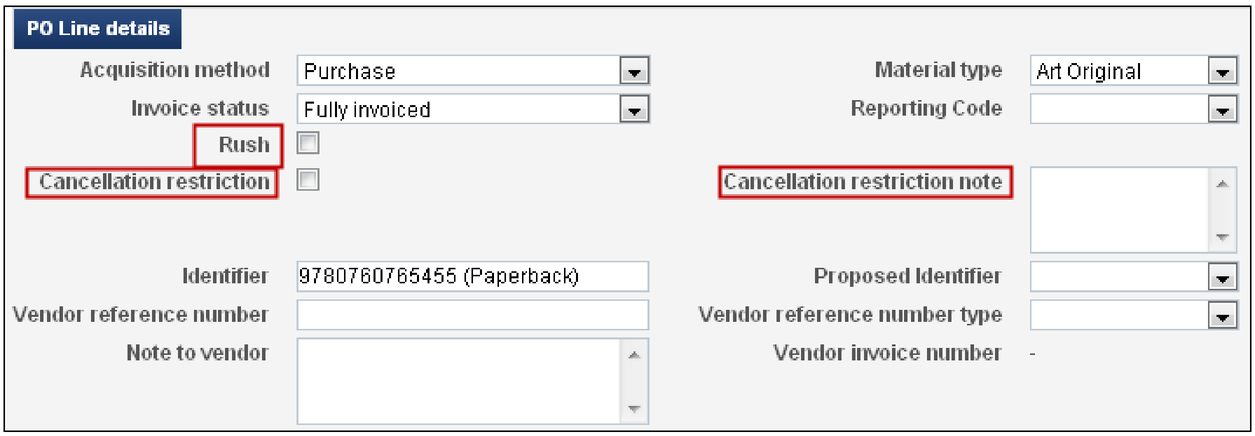



**Figure 43 – PO Line Summary Page – PO Line Details**

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]<br>**Note:** 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**.

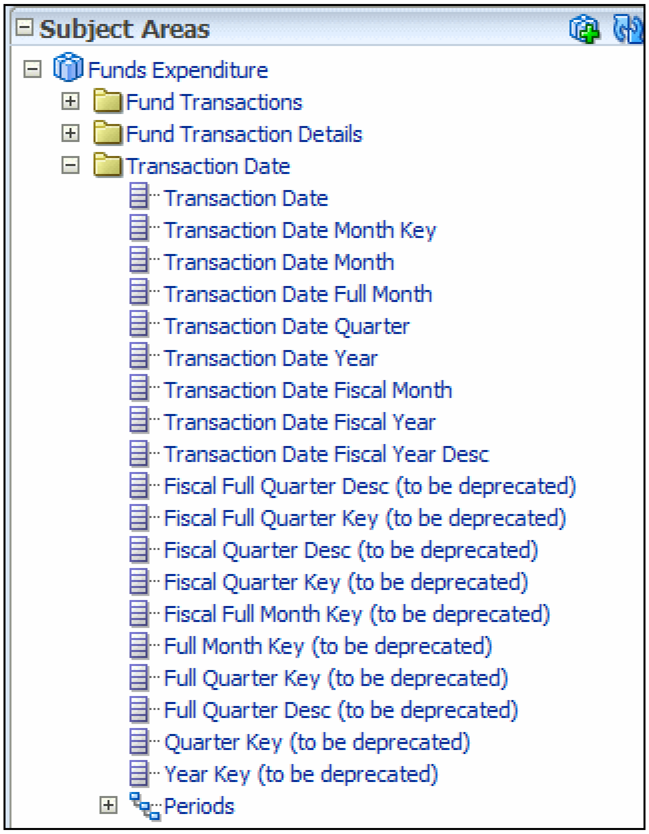



**Figure 46 –Transaction Date**

# 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 |
|---|---|---|---|---|---|
| 38490040000121 | 6/17/2012 | 08:10:49 | 9/5/2012 | 14:36:15 | 50 |
| 53779110000121 | 7/12/2012 | 14:45:16 | 8/21/2012 | 12:56:44 | 50 |
| 54042360000121 | 7/30/2012 | 09:04:10 | 7/30/2012 | 09:05:13 | 50 |
| 55526740000121 | 7/25/2012 | 15:23:46 | 7/25/2012 | 15:24:43 | -50 |
| 55526750000121 | 7/25/2012 | 15:23:46 | 7/25/2012 | 15:24:43 | 50 |
| 55526760000121 | 7/25/2012 | 15:23:46 | 7/25/2012 | 15:24:43 | 50 |
| 55917870000121 | 7/12/2012 | 14:45:16 | 8/21/2012 | 12:56:44 | 50 |
| 55920450000121 | 1/23/2012 | 09:45:52 | 1/23/2012 | 09:52:16 | 50 |
| 55920460000121 | 1/23/2012 | 09:45:52 | 1/23/2012 | 09:52:16 | 50 |
| 91216950000121 | 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.

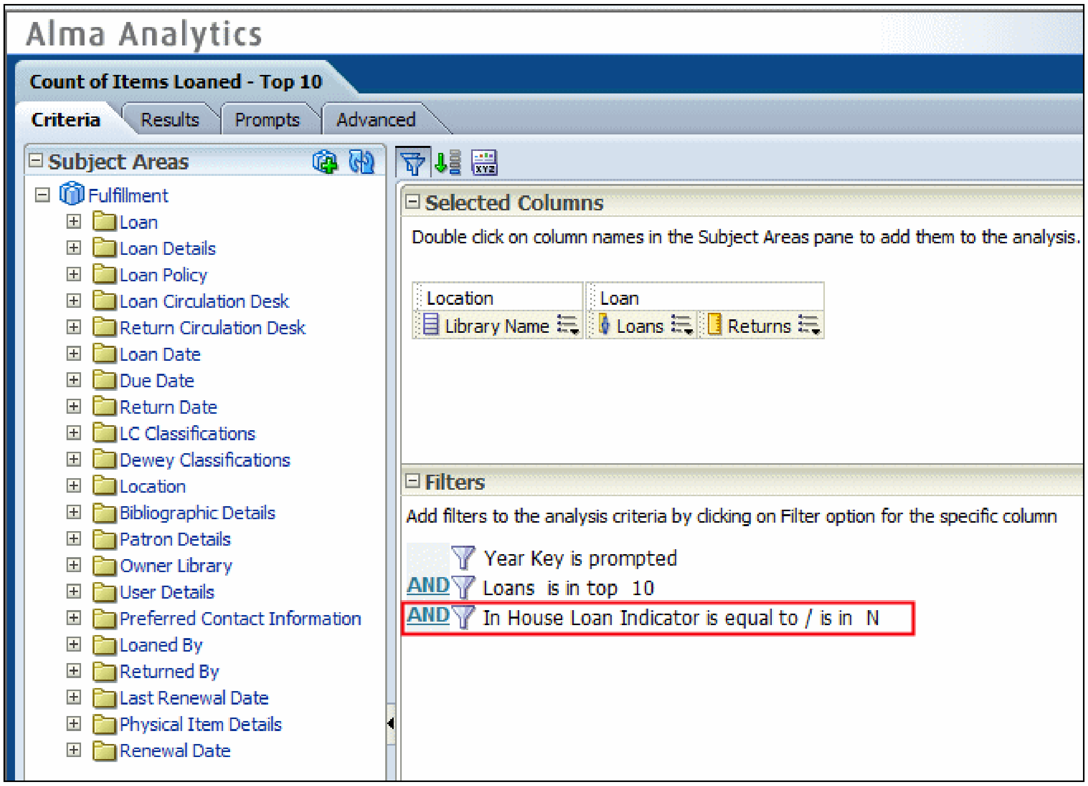



**Figure 49 – In-House Loans Not Considered in Alma OTB Fulfillment Reports**

# 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.

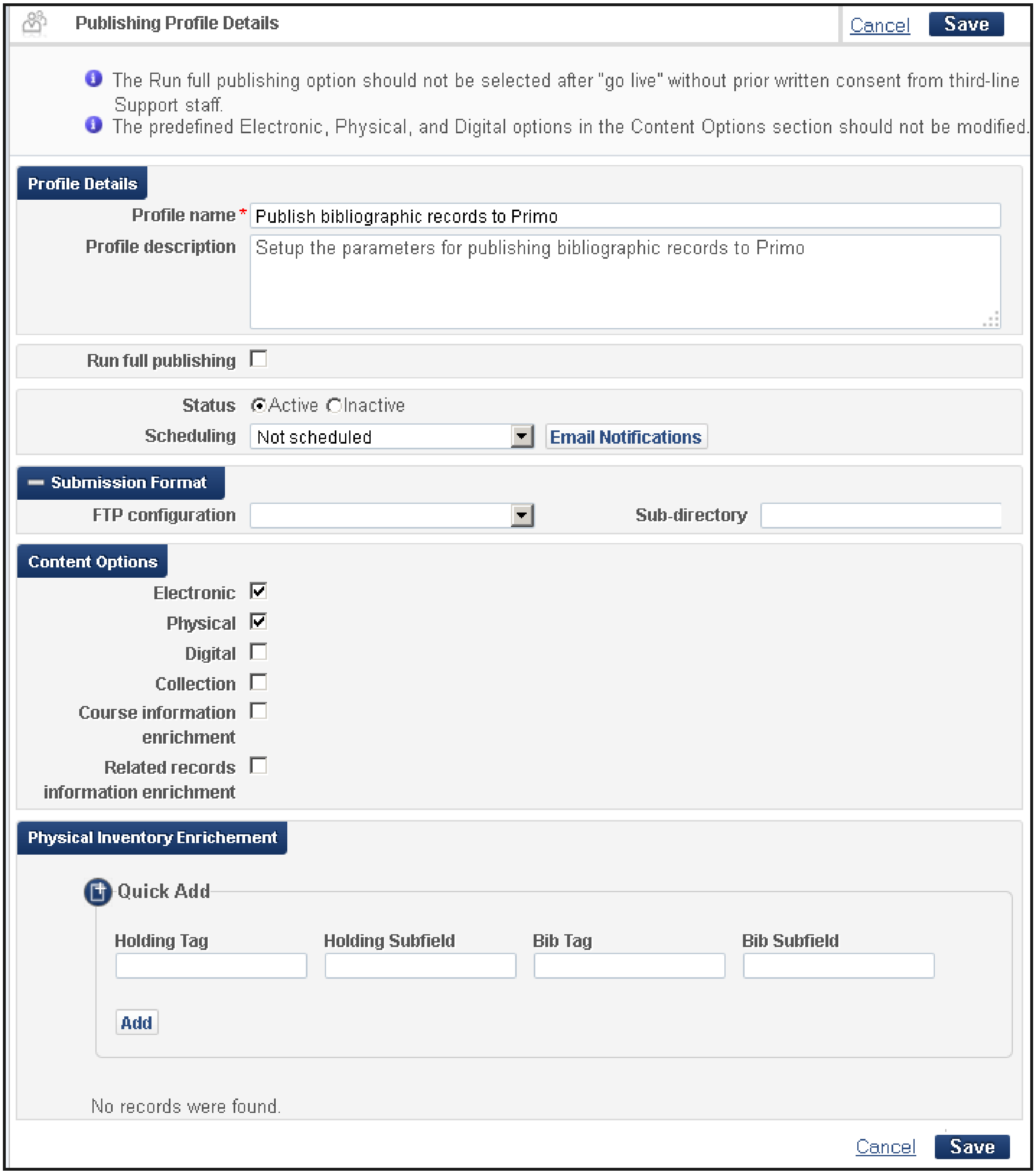



**Figure 51 – Primo Publishing Profile Details**

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**.

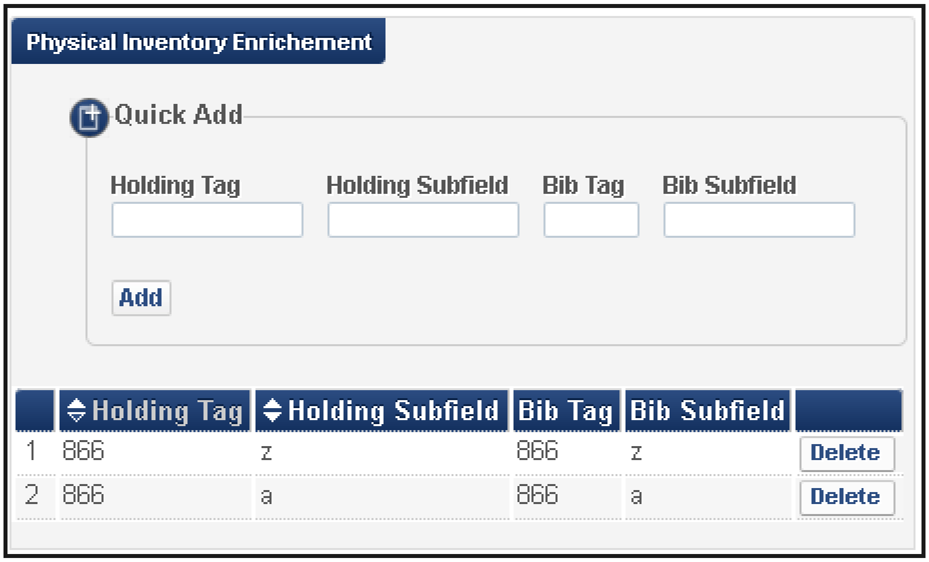



**Figure 52 - Holdings Mappings Added**

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

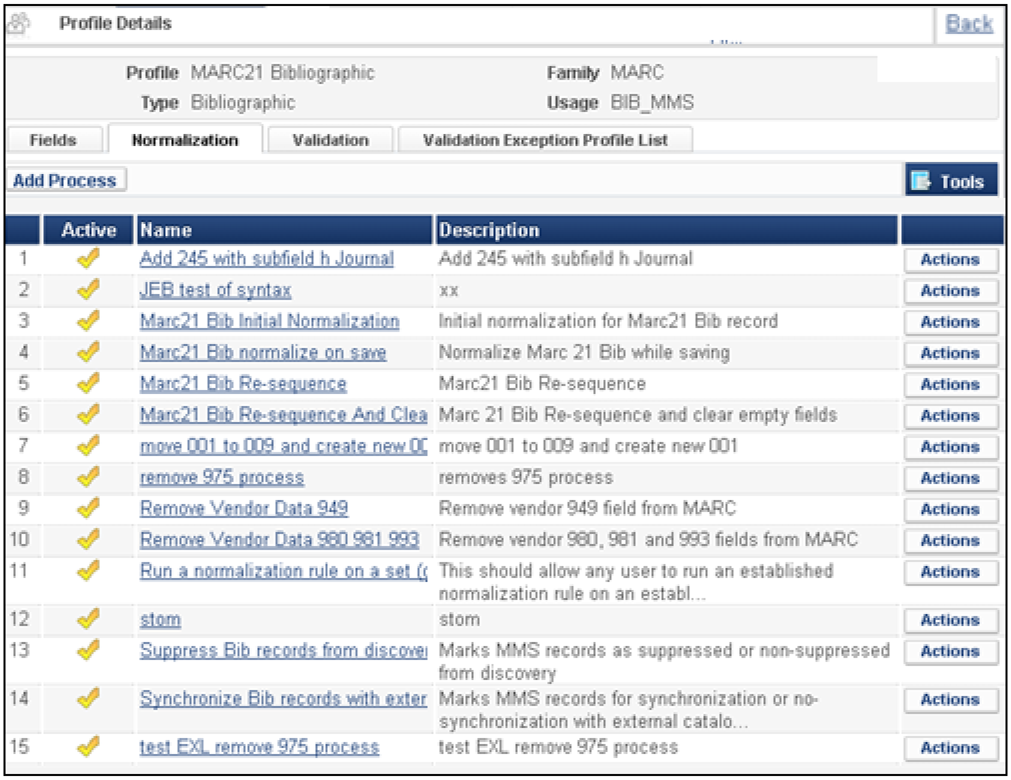
Alma has been enhanced to globally update local fields of NZ-linked records to enable the maintenance of local extensions. Refer to the illustration below for an example of a record that contains local extension content in an NZ-linked record.

| | | | |
|---|---|---|---|
| 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 MARC
Type Bibliographic | Usage BIB_MMS

Fields | Normalization | Validation | Validation Exception Profile List

Add Process | Tools

| | Active | Name | Description | |
|---|---|---|---|---|
| 1 | ✓ | Add 245 with subfield h Journal | Add 245 with subfield h Journal | Actions |
| 2 | ✓ | JEB test of syntax | xx | Actions |
| 3 | ✓ | Marc21 Bib Initial Normalization | Initial normalization for Marc21 Bib record | Actions |
| 4 | ✓ | Marc21 Bib normalize on save | Normalize Marc 21 Bib while saving | Actions |
| 5 | ✓ | Marc21 Bib Re-sequence | Marc21 Bib Re-sequence | Actions |
| 6 | ✓ | Marc21 Bib Re-sequence And Clea | Marc 21 Bib Re-sequence and clear empty fields | Actions |
| 7 | ✓ | move 001 to 009 and create new 0C | move 001 to 009 and create new 001 | Actions |
| 8 | ✓ | remove 975 process | removes 975 process | Actions |
| 9 | ✓ | Remove Vendor Data 949 | Remove vendor 949 field from MARC | Actions |
| 10 | ✓ | Remove Vendor Data 980 981 993 | Remove vendor 980, 981 and 993 fields from MARC | Actions |
| 11 | ✓ | Run a normalization rule on a set (( | This should allow any user to run an established normalization rule on an establ... | Actions |
| 12 | ✓ | stom | stom | Actions |
| 13 | ✓ | Suppress Bib records from discove | Marks MMS records as suppressed or non-suppressed from discovery | Actions |
| 14 | ✓ | Synchronize Bib records with exter | Marks MMS records for synchronization or no-synchronization with external catalo... | Actions |
| 15 | ✓ | test EXL remove 975 process | 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.

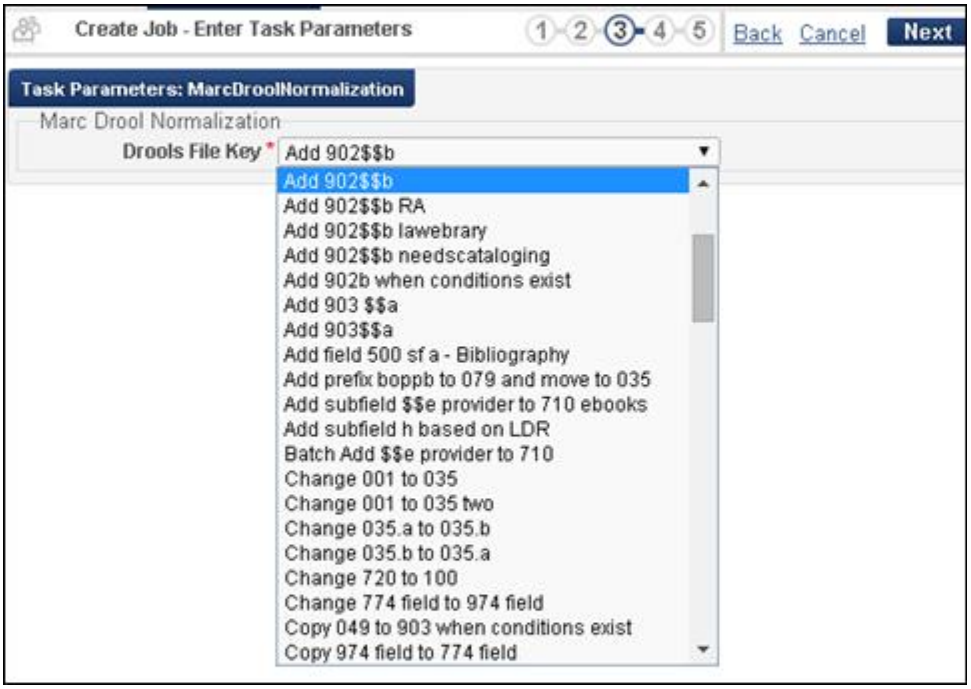



**Figure 55 - Confirm Drools File Key Option**

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.

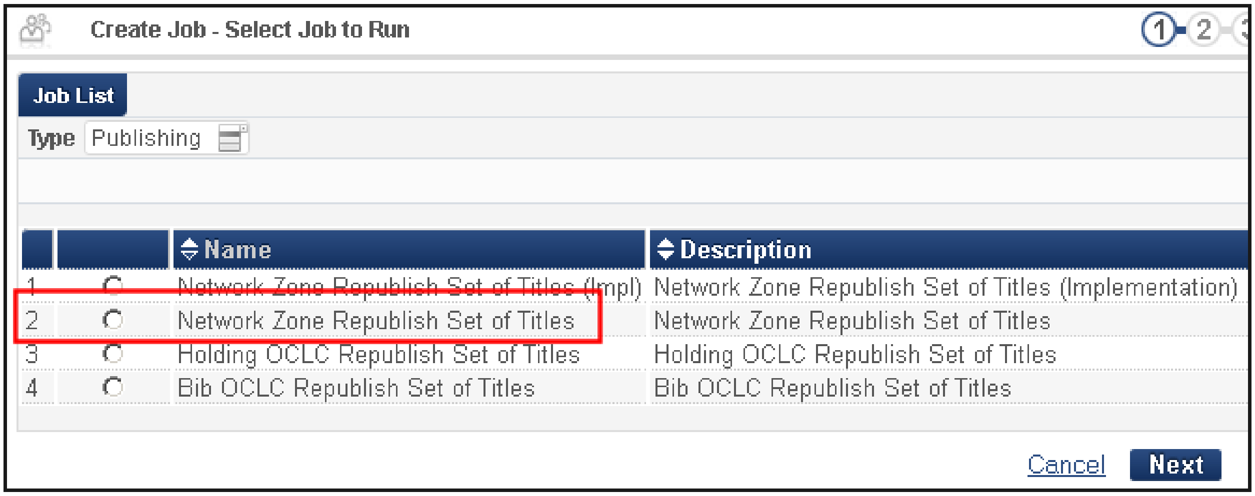



**Figure 57 – Create Job – Select Job to Run Page**

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:

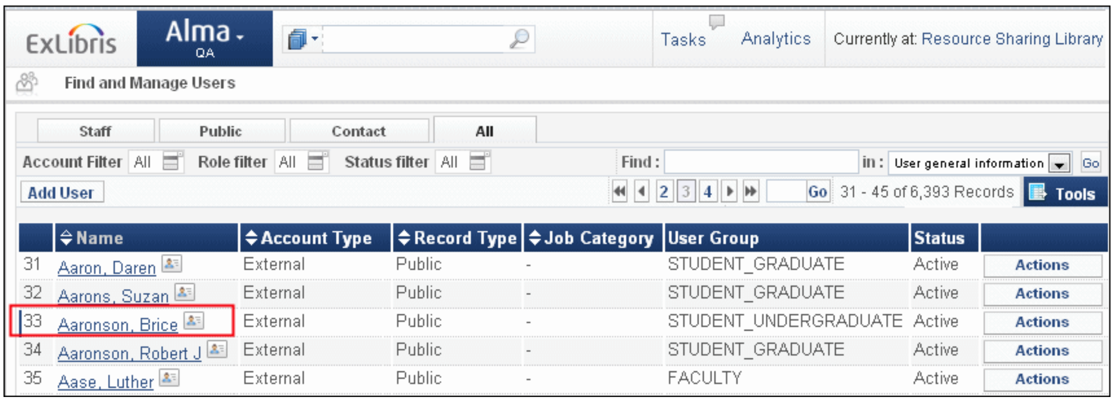



**Figure 58 – Last Item Edited Indicator**

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

# 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.