



Alma June 2014 release:  
**Celebrating the FIFA  
World Cup in Brazil!**

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

# Alma June 2014 Release Highlights

## Acquisitions

- Information Added to Communication Letter to Vendor

Until now, there was no default text in the body of the letter that Alma sent to a vendor. Now text containing the information of the PO line has been added to this letter.

- PDA Alerts

New functionality has been added to the Patron Driven Acquisition (PDA) configuration making it possible to configure an alert percentage (on a budget). An email notification will be sent to a contact person when the PDA usage exceeds the alert percentage of the budget threshold.

- Support for Routing and Binding Notifications During Receiving

Notification messages indicating whether a PO line has resources associated with it that should be routed during receiving and/or bound during receiving can now be displayed.

- Relinking Bibliographic Records for Continuous PO Lines

Alma now allows for relinking the bibliographic record to which a PO line is linked for continuous orders (subscriptions), thereby moving the inventory to a different bibliographic record. Relinking that takes place from the List of Holdings (in Resource Management) also updates the bibliographic record to which the associated PO line is linked. Related to this development is the option to change the bibliographic record reference of a PO line to a different bibliographic record without changing the inventory (for all types of orders).

## Resource Management

- Files Processed Column Added to Import Monitoring

The monitoring page of the metadata import jobs now includes additional indicators and information for each job listed, such as a progress bar showing percentages of completion for each job and a pop-up menu containing counts of the stages and statuses of the files in the import job.

- Additional Publishing Profile for PubMed

It is now possible to define an additional publishing profile – one specifically for PubMed. This publishing profile enables you to share with PubMed your electronic journal inventory that is relevant to PubMed. PubMed will then be able to provide a visual indication for the

PubMed titles to which the library has full-text access and provide access to them using the Alma Link Resolver.

- Cascading Delete for Bibliographic Records

With the June release, you can delete a bibliographic record and its associated inventory in a single process (if no PO line is attached to the bibliographic record or its inventory and there is no electronic collection associated with the bibliographic record.)

- History Tab Provided for Electronic Resources

As with PO lines, a History tab is now available in the electronic collection, electronic service, and electronic portfolio editors.

## Fulfillment

- Multichannel Support for Letters

Alma now provides SMS delivery to the patron's preferred SMS phone number for Change Due Date, Request Cancellation, Lost Loan, Lost Loan Notification, and Borrowing Activity.

- Linked Courses Added to the More Info Dialog Box

A Courses link has been added to the More Info dialog box allowing for the display of courses that are linked to a title. The Courses link indicates the number of linked courses.

- Hold Period Updated to Include Closed Days

The hold period calculation has been changed to account for closed days. For example, if the hold period for an item is defined as 7 days and the library is closed for a holiday on any of the next seven days, an additional day will be added to the item's hold period.

## Primo

- Primo Request List Enhancements

For non-active hold and digitization requests, Primo now displays the item's place in the queue in the request list on the My Account > Requests page.

- Display Additional Holdings Information in the Primo Get It Tab

It is now possible to display additional holdings information in the Primo Get It tab. The Release Notes lists the MARC fields that can be displayed.

## Resource Sharing

- **Automatically Receiving a Resource Sharing Item**

An NCIP resource sharing partner can now receive a resource sharing item automatically. Setting an automatic receive enables the staff to register a receive action only in the broker system, without having to repeat the action in Alma.
- **Request Renewal for a Received Item**

This feature enables requesting and activating renewal of a resource sharing borrowing request from the lending institution. Renewal requests will be sent using ISO.

## Analytics

- **Addition of Interested Users to the PO Line Shared Dimension**

The Interested Users field has been added to the shared PO Line dimension in all subject areas in which it appears.
- **Addition of a Renewal Date Dimension to the Fulfillment Subject Area**

The Renewal Date dimension has been added to the Fulfillment subject area. This information can be used to count the number of renewals within a certain time period.

## Collaborative Networks and Multicampus Institutions

- **Inherited Group Settings Indicator**

For Network Zone (NZ) or multicampus environments that have group settings defined, the electronic collection, service, and portfolio editors display Available For inherited group settings from the higher level. The inherited group settings are listed after the Available For heading.

## Alma Interface Updates

- **Exported Excel Format Enhanced**

Data from lists in Alma can be exported to an Excel spreadsheet. The formatting of this Excel has been enhanced – for example, the columns are auto-sized to fit content up to 50 characters.

# Data Services

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

## New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma CZ during the period 28-April-2014 through 25-May-2014:

- Taylor & Francis FRESH Combined Package
- Taylor & Francis FRESH Social Science & Humanities
- Taylor & Francis FRESH Science & Technology
- Taylor & Francis Combined New Launch Trial (Volume 1 & 2)
- Taylor & Francis Social Science & Humanities New Launch Trial (Volume 1 & 2)
- Taylor & Francis Science & Technology New Launch Trial (Volume 1 & 2)
- SpringerLink Books Behavioral Science 2014
- SpringerLink Books Biomedical and Life Sciences 2014
- SpringerLink Books Business And Economics 2014
- SpringerLink Books Chemistry And Material Science 2014
- SpringerLink Books Computer Science without Lecture Notes 2014
- SpringerLink Books Earth And Environmental Science 2014
- SpringerLink Books Energy 2014
- SpringerLink Books Engineering 2014
- SpringerLink Books Humanities and Social Sciences (German) 2014
- SpringerLink Books Humanities and Social Sciences (German) 2014
- SpringerLink Books Humanities, Social Sciences And Law 2014
- Springer Link Books Business and Economics German 2014
- Springer Link Books Medicine German 2014
- Springer Link Books Computer Science and Engineering German 2014
- Springer Link Books Life Science and Basic Disciplines German 2014

- Springer Link Books Medicine Dutch 2014
- CRKN\_Swets\_ALPSP\_Collection\_2008-2013
- HYRead eBooks
- Taiwan Academic E-Books Consortium (TAEBC) IOS eBooks
- Chinese Electronic Periodical Services (CEPS)
- Project Muse eBooks 2014
- JSTOR Arts & Sciences XIII

## **New External Resources That Are Open for Searching**

This section highlights the new external resource names. The following external resources were added for this release (available on June 1<sup>st</sup>):

- British National Bibliography (BNB) – requires credentials to access
- Edinburgh University Library
- Purdue University Catalogue – requires credentials to access
- SWB Katalog (Südwestdeutscher Bibliotheksverbund)

# Alma Show Me How and Videos

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

## Alma Show Me How – June

### 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 June release, the following Show Me How scenarios are available:
  - Change Bib Reference of a PO Line
  - Resource Sharing (ILL): Create Template for Query to Patron
  - Set Due Date and Shipping Costs at Ship Time
  - View Courses Linked to a Title
  - PDA Alerts

## Alma Videos – June

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

- ISO Resource Sharing (ILL): Send General Message
- Change Bib Reference of a PO Line
- Navigate to Notes During Receiving
- PO Line Info in Communication to Vendor
- Resource Sharing (ILL): Create Template for Query to Patron
- History Tab for Electronic Resources
- Set Due Date and Shipping Costs at Ship Time
- View Courses Linked to a Title
- General Publishing Profile: Add Holdings and Items Info
- PDA Alerts
- E-Resources: Inherited “Available for” Groups

# 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 May 2014 release:

- Using the Repository Search Results List – This section has been revised and reorganized to include an explanation of the available facets and a presentation of the various options for each type of search in a clear and concise table (under Resource Management > Using the Repository Search).
- Integrating Remote Digital Asset Management Systems – This section provides an overview of the steps involved in integrating a remote digital system and provides links to the various sections of the documentation that describe these steps in greater detail (under Integrations with External Systems > Resource Management).
- Descriptions of License Terms – A table listing all of the available license terms and their descriptions is now available (under Acquisitions > Configuring Acquisitions > Licenses > Configuring Term Types > Adding a Term Type Definition).

The above will be available with the update of the documentation on the 1<sup>st</sup> of June.

## Particular Issues to Note

With the June release, Ex Libris has extended the capabilities of the Ex Libris Developer Network for Alma customers. It is now possible to manage and execute APIs with your institution's Alma data (on both sandbox and production environments) directly and securely using the Developer Network.

All existing Alma customers have been registered with a single, institution-specific administrative user in the Ex Libris Developer Network. This user allows working with your sandbox and production data and inviting/registering/managing permissions for other non-administrative users who are associated with your institution and require secure and specific API access to your institution's data. In order to receive your specific temporary institutional admin user credentials, please open a support case with this request and provide the email contact information of the person who should receive these initial administrative credentials for your institution.

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**Note:** If you are currently implementing Alma or have not yet implemented Alma, the relevant credentials for the Ex Libris Developer Network will be provided to you directly as part of your implementation by your Ex Libris project manager.

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Upon first login as the administrator, you will change the temporary password and update the email of this administrative user for security and personalization purposes. From there, you are ready to manage your institution's Developer Network.

As noted, with the institution's Alma administrator, each institution may invite other specific users to work on APIs with their institution. It is important to note that the invitees should not yet be self-registered as users in the Developer Network, as the invitation itself will register them in the correct institutional context. If you have already registered and have actively used the Developer Network since its release last month and would like to be associated with your institution, please open a SF case with your user name, email, and requested institution to be associated. In most cases, this should not be necessary and any inactive self-registered user can remain in addition to a newly institution-associated invited user.

More information about using the Ex Libris Developer Network is available under Getting Started, at the following URL: <https://developers.exlibrisgroup.com/alma>

# Acquisitions

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

## Support for Separate Vendor for Use Tax/VAT Collection

### Description

This feature enables assigning a separate vendor – called a **Governmental** vendor – to receive use tax (VAT) for an invoice payment. The Governmental vendor's invoices handle only use tax on invoices, ensuring that tax payments are handled separately from the regular invoice charges and go directly to the government. Use tax represents a tax on the usage of library items, and is expended from the same funds as the actual invoice charges.

The Governmental vendor cannot be selected when configuring a vendor for the PO line or invoice; it is used only for handling use tax invoices.

### Technical Instructions

The following role can create a separate vendor for collecting use tax:

- Vendor Manager

The following roles can configure an invoice to receive VAT payment:

- Invoice Operator
- Invoice Manager

The following role can export an invoice for payment:

- General System Administrator

## To designate a vendor for use tax (VAT) collection:

- 1 On the Search Vendors page (**Acquisitions > Acquisitions Infrastructure > Vendors**), click **Add Vendor** to create a new vendor. The Vendor Details page opens.

The screenshot shows the 'Vendor Details' page with the 'Vendor General Details' section. The 'Governmental' checkbox is unchecked. The 'Name' field is empty, and the 'Code' field contains 'gov1'. The 'Status' is set to 'Active'. The 'Liability for VAT' checkbox is unchecked. The 'Libraries' dropdown is set to 'Main Campus(Including)'. The 'Currencies' dropdown is set to 'ALL'. The 'Language' dropdown is set to 'English'. The 'Material Supplier/Subscription Agent' and 'Access Provider' checkboxes are unchecked. The 'Licensor' checkbox is unchecked. The 'Created by' field is 'exl\_support (08/05/2014)' and the 'Last updated by' field is 'Ex Libris (08/05/2014)'.

Figure 1 – Vendor Details Page

- 2 Fill in information in the mandatory fields.
- 3 Select the **Governmental** check box. The **Tax percentage** field appears.

The screenshot shows the 'Vendor Details' page with the 'Vendor General Details' section. The 'Governmental' checkbox is checked. The 'Name' field contains 'Gov 1' and the 'Code' field contains 'gov1'. The 'Status' is set to 'Active'. The 'Liability for VAT' checkbox is checked. The 'Libraries' dropdown is set to 'Main Campus(Including)'. The 'Currencies' dropdown is set to 'ALL'. The 'Language' dropdown is set to 'English'. The 'Material Supplier/Subscription Agent' and 'Access Provider' checkboxes are unchecked. The 'Licensor' checkbox is unchecked. The 'Created by' field is 'exl\_support (08/05/2014)' and the 'Last updated by' field is 'Ex Libris (08/05/2014)'. Below the 'Governmental' checkbox, the 'TAX Percentage' field is visible and highlighted with a red box.

Figure 2 – Vendor Details Page

- 4 Enter a numerical value for the tax to be administered in the **Tax percentage** field, and click **Save**.

The vendor is saved on the Search Vendors page with **Vendor Type = Governmental**. The governmental vendor sends a separate invoice containing only use tax on an invoice's charges, according to the value entered in the **Tax percentage** field.

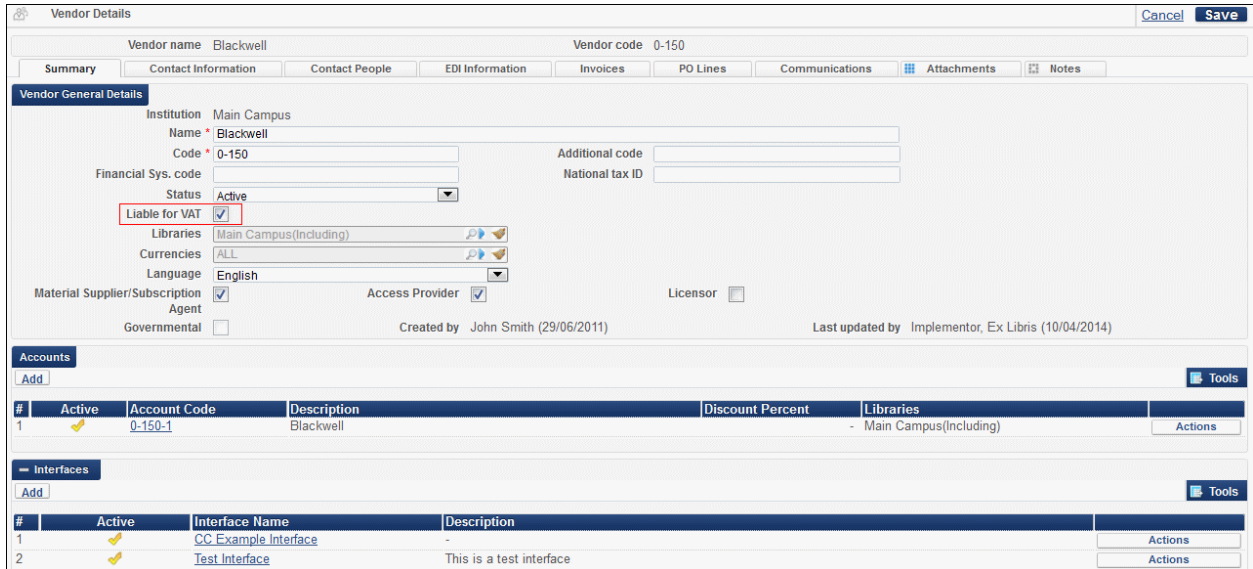
---

**Note:** There can be only one governmental vendor in an institution.

---

## To enable appending use tax (VAT) to a vendor's invoices:

- 1 On the Search Vendors page (**Acquisitions > Acquisitions Infrastructure > Vendors**), locate the relevant non-governmental vendor and select **Actions > Edit**. The Vendor Details page opens.



Vendor Details

Vendor name: Blackwell Vendor code: 0-150

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

**Vendor General Details**

Institution: Main Campus  
Name: \* Blackwell  
Code: \* 0-150  
Financial Sys. code:   
Status: Active  
**Liable for VAT**   
Libraries: Main Campus(Including)  
Currencies: ALL  
Language: English  
Material Supplier/Subscription Agent:  Access Provider:  Licensor:   
Governmental:  Created by: John Smith (29/06/2011) Last updated by: Implementor, Ex Libris (10/04/2014)

**Accounts**

#	Active	Account Code	Description	Discount Percent	Libraries	Actions
1	<input checked="" type="checkbox"/>	0-150-1	Blackwell		- Main Campus(Including)	Actions

**Interfaces**

#	Active	Interface Name	Description	Actions
1	<input checked="" type="checkbox"/>	CC Example Interface		Actions
2	<input checked="" type="checkbox"/>	Test Interface	This is a test interface	Actions

Figure 3 – Vendor Details Page – Liable for VAT Check Box

- 2 On the Summary tab page, ensure that the **Liable for VAT** check box is selected, and click **Save**.

Use tax can be paid on this vendor's invoices through the invoice generated by the Governmental vendor.

## To configure an invoice to append to a use tax invoice:

- 1 On the Search Invoices page (**Acquisitions > Receiving and Invoicing > Search for Invoice**), select **Actions > Edit** for an invoice. The Invoice Details page Summary tab opens.

The screenshot displays the 'Invoice Details' page in a web application. At the top, there are fields for 'Invoice Number' (147741), 'Unique Invoice Identifier' (678813450000121), and 'Vendor' (0-150). Below this is a navigation bar with tabs for 'Summary', 'Alerts', 'Invoice Lines', 'Notes', and 'Attachments'. The main form area is divided into several sections: 'Invoice Information' with fields for 'Invoice Number', 'Invoice Date', 'Total amount', 'Vendor', 'Vendor Contact Person', 'Invoice Reference #', and 'Created By'; 'Approval' with 'Status' (Pending) and 'Approved By'; 'Additional Charges' with 'Use Pro rata' checked and various amount fields; 'VAT' with 'Report Tax' checked, 'VAT per invoice line' unchecked, 'VAT %' (0.0), 'Amount' (0.0), 'Vendor tax (local currency)', 'VAT Type' (Exclusive), and 'Expended from fund' checked; and 'Payment' with 'Prepaid' and 'Internal Copy' unchecked.

Figure 4 – Invoice Details Page – Summary Tab

- 2 In the VAT section, ensure that the **Report tax** field is selected. The **VAT** and **Amount** fields are disabled, and any values in these fields revert to 0.

This is a close-up view of the VAT section from Figure 4. A red rectangular box highlights the 'Report Tax' checkbox, which is checked. The 'VAT per invoice line' checkbox is unchecked. The 'VAT %' and 'Amount' input fields are disabled and contain the value '0.0'. The 'Vendor tax (local currency)' field is also disabled and empty. The 'VAT Type' dropdown menu is set to 'Exclusive', and the 'Expended from fund' checkbox is checked.

Figure 5 – Report Tax Field

- 3 In the **VAT type** field, select **Exclusive**.
- 4 Click **Save and Continue**.

The invoice is configured to link to a use tax Governmental vendor invoice.

---

**Note:** A use tax invoice can be appended to an invoice only if the institution has a configured Governmental vendor.

---

**To export an invoice for payment and generate a use tax invoice:**

- 1 On the Find Invoices page (**Acquisitions > Receiving and Invoicing > Search for Invoice**), locate the invoice for which you assigned the **Report Tax** option in the previous procedure. Ensure that the invoice has a status of either **Waiting for Payment** or **Ready to be Paid**.

- 2 Run the **Export Invoices for Payment** process, as follows:
  - a On the Integration Profile List page (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**), locate the **Automation Finance** entry and select **Actions > Edit**. The External System page opens.
  - b Click the **Actions** tab and in the **Export Invoices for Payment** section, click **Run**.

The screenshot shows the 'External System' configuration page. At the top, there is a table with columns: Code, Automation Payment, Name, Automation Payment, and Integration Type. The 'Automation Finance' entry is selected. Below the table, there are three tabs: 'General Information', 'Actions', and 'Contact Info'. The 'Actions' tab is active, showing several sections: 'Import Payment Confirmation', 'Export Invoices For Payment', 'Funds Allocation Loader', and 'Export Orders (PO)'. The 'Export Invoices For Payment' section is highlighted with a red box, and its 'Run' button is also highlighted with a red box. The 'Run' button for 'Import Payment Confirmation' is also visible. The 'Export Invoices For Payment' section includes fields for 'Active' (radio buttons for Active and Non Active), 'Plugin' (dropdown), 'Output File Path' (text input with value 'export'), 'Schedule' (dropdown with value 'Not scheduled'), and a checked checkbox for 'Use updated XSD format (the deprecated version 1 will no longer be supported as of 1/Jan/2015)'. The 'Funds Allocation Loader' section includes fields for 'Active', 'Plugin', 'Input File Path' (value 'input\_funds'), 'File Extensions' (radio buttons for Csv and Excel), and 'Schedule'. The 'Export Orders (PO)' section includes fields for 'Active', 'Plugin', and 'Output File Path' (value 'export\_order\_rerun').

Figure 6 – Export Invoices for Payment Job

A status message displays at the top of the page, indicating that the process ran successfully.

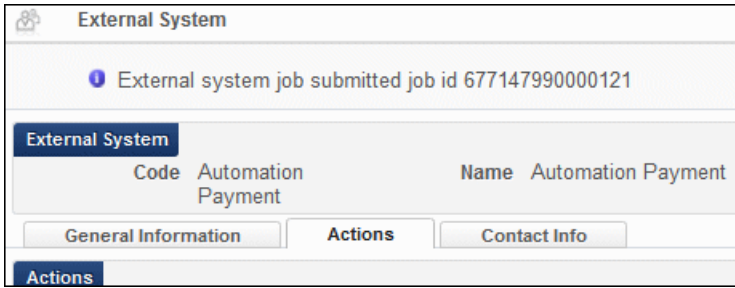


Figure 7 – Export Invoices for Payment Job – Status Message

- 3 Perform a search for the invoice. The invoice displays in the table together with a second invoice that will handle the tax. This second invoice has the same invoice number as the original invoice, with the suffix **\_RT**, indicating that it is the **Report Tax** invoice.

	Invoice #	
1	123	1
2	123 RT	1

Figure 8 – Invoice Number Column

The RT invoice contains only the use tax amount to be paid on the original invoice.

## Configure Invoice with Use Pro Rata Option Selected by Default

### Description

This feature enables defining whether the **Use pro rata** option is selected by default when creating an invoice.

### Technical Instructions

The following roles can configure the **Use pro rata** option to be selected when creating an invoice:

- Acquisitions Administrator
- General System Administrator

#### To configure the Use pro rata option by default:

- 1 On the CustomerParameters Mapping Table page (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**), locate the **invoice\_use\_pro\_rata** setting.

Mapping Table								Cancel	Save
You are configuring: Main Campus						Organization Unit List			
Table Information									
Sub System		INFRA		Table Name		CustomerParameters			
Updated By		-		Last Updated		-			
Table Description				Customer Parameters					
Mapping Table Rows								Tools	
#	Enabled	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated		
1	<input checked="" type="checkbox"/>	assertion_over_po_line_price	acquisition	10000		-	-	Customize	
2	<input checked="" type="checkbox"/>	auto_claim	acquisition	Y	Send Claim notification to v	-	-	Customize	
3	<input checked="" type="checkbox"/>	expended_from_fund_default	acquisition	true		-	-	Customize	
4	<input checked="" type="checkbox"/>	exportPrepaidInv	acquisition	false	Invoice to be exported to EF	-	-	Customize	
5	<input checked="" type="checkbox"/>	handle_invoice_payment	acquisition	true		-	-	Customize	
6	<input checked="" type="checkbox"/>	invoice_allow_vat_in_line_level	acquisition	true		exl_impl	01/05/2014	Restore	
7	<input checked="" type="checkbox"/>	invoice_high_total_price	acquisition	2500		-	-	Customize	
8	<input checked="" type="checkbox"/>	invoice_not_unique	acquisition	false		exl_impl	01/05/2014	Restore	
9	<input checked="" type="checkbox"/>	invoice_prefix	acquisition	INV-		-	-	Customize	
10	<input checked="" type="checkbox"/>	invoice_skip_erp	acquisition	false	Dont send invoices to ERP.	exl_impl	01/05/2014	Restore	
11	<input checked="" type="checkbox"/>	invoice_subscription_overlap	acquisition	true		-	-	Customize	
12	<input checked="" type="checkbox"/>	invoice_use_pro_rata	acquisition	true		exl_impl	01/05/2014	Restore	
13	<input checked="" type="checkbox"/>	po_line_prefix	acquisition	POL-		-	-	Customize	

Figure 9 – CustomerParameters Mapping Table Page – invoice\_use\_pro\_rata Setting

- 2 Click **Customize** for the setting, and change the parameter value to **true**.
- 3 Click **Save**. Newly created invoices will have the **Use pro rata** setting selected by default.

## Support for Consolidating Amounts into a Fund

### Description

This feature enables loading an EDI Invoice when the **Use pro rata** option is not selected for an invoice. This creates invoice lines for the **Overhead** and **Discount** charges, instead of spreading (prorating) charges among all lines in the invoice.

### Technical Instructions

The following role can set invoice prorating definitions:

- Vendor Manager

**To consolidate invoice charges into a single fund when loading an invoice with EDI:**

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

Figure 10 – Vendor Details Page – EDI Information Tab

3 In the **Invoice Job Parameters** section, select **Do not prorate**. The **Fund** field appears.

Figure 11 – Do Not Prorate – Fund Field

4 Select a fund and click **Save**.

When an invoice is loaded from an EDI file, overhead and discount amounts are charged to their own invoice lines, which use the specified fund.

## Improved Handling of PO Line Notes and Interested Users

### Description

This feature enables linking directly from the Receive New Material page to the Notes and Interested Users tabs for a PO line. The check marks on the Receive New Material page that indicate whether the PO line has notes and/or interested users are links that open the Notes and

Interested Users tabs for the specified PO line. In addition, notes are now included as part of the print slip.

You must ensure that the **Currently at:** link at the top of the page is set to an Acquisitions department.

## Technical Instructions

The following role can link to the Notes and Interested Users tabs for a PO line when receiving new material:

- Receiving Operator

The following roles can access Notes in the Print Slip feature:

- Receiving Operator
- Purchasing Operator

The following roles can access Notes in the Customizing Letters feature:

- General System Administrator
- Letter Administrator

### To link to the Notes and Interested Users tabs for a PO line when receiving new material:

- On the Receive New Material page (**Acquisitions > Receiving and Invoicing > Receive**), locate a PO line with a check mark in the **Notes** and/or **Interested Users** columns.

#	↔#	↕Item description	Status	Locations	# Ordered	Items Received	↕Date Sent	Next Step	↕Rush	Notes	Interested Users	
1	<a href="#">POL-17922</a>	Contributions to the History of Economic Thought - Essays in Honour of R. D. C. Black London. Routledge, 2001. 0-415-21552-8. ISBN	Sent	-	1	0	03/04/2012	-	✓			Manage
2	<a href="#">POL-5717</a>	01022012_052155 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble... 2005... 9780760765455 (Paperback). ISBN	Sent	-	3	0	23/01/2013	-		✓	✓	Actions
3	<a href="#">POL-12231</a>	01032012_042313 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble... 2005... 9780760765455 (Paperback). ISBN	Sent	-	3	0	17/04/2012	-				Manage
4	<a href="#">POL-12233</a>	01032012_043205 Barnes & Noble Library of Essential Reading... [S.I.] : Barnes & Noble... 2005... 9780760765455 (Paperback). ISBN	Sent	-	3	0	30/04/2012	-				Manage

Figure 12 – Receive New Material Page — Notes and Interested Users Check Marks

- Click the check mark in either the Notes or Interested Users column. The Notes or Interested Users tab displays for the selected PO line.

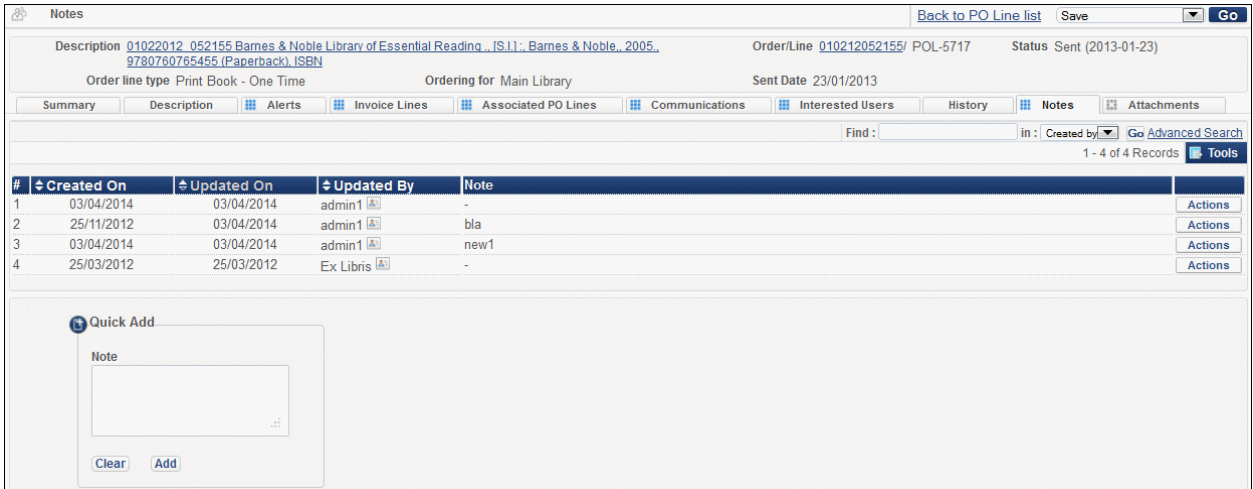


Figure 13 – Notes Tab

### To view notes in the Print Slip feature:

On the Items in Department page (**Acquisitions > Post-Receiving Processing > Receiving Department Items**), select **Actions > Print Slip** for an item. The print slip is sent, including the notes contained in the specified PO line.

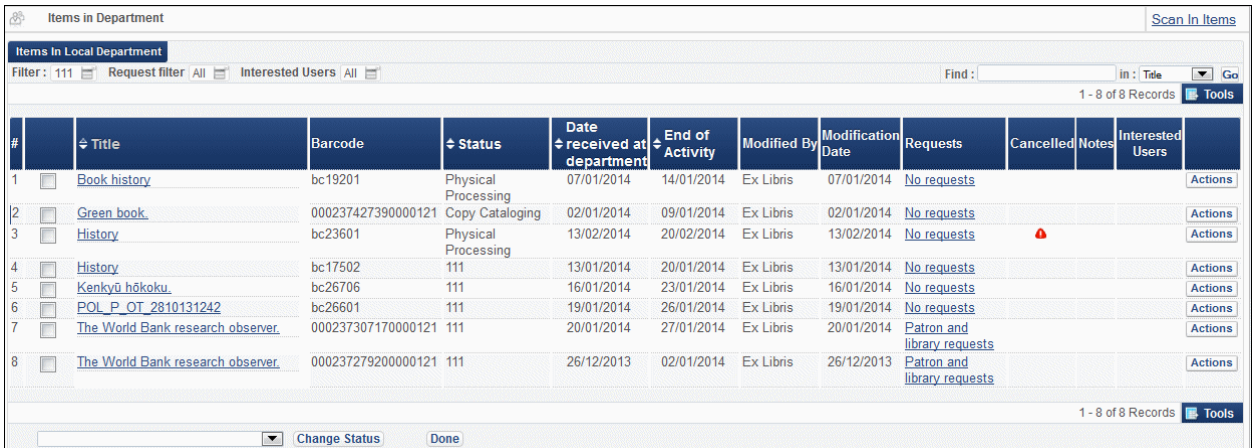


Figure 14 – Items in Department Page

Notes that are configured using the Receiving Slip Notification Letter configuration option (**General > General Configuration > Configuration Menu > General Configuration > Customize Letters**) are sent with the print slip.

**Note:** If the print slip letter has been modified, you must modify the print slip letter to include the note information, using the out-of-the-box print slip letter as a reference.

# Support for Routing and Binding Notifications on PO Lines During Receiving

## Description

Notification messages indicating whether a PO line has resources associated with it that should be routed during receiving and/or bound during receiving (for continuous PO lines only) can now be displayed.

## Technical Instructions

The following roles can enable routing or binding notification:

- Purchasing Operator
- Purchasing Manager

### To enable a routing or binding notification message:

- 1 On the Purchase Order Lines in Review page (**Acquisitions > Purchase Order Lines > Review**), locate a PO line (for binding, one with the Print Journal – Subscription purchase type).
- 2 Click **Edit** for the PO line. The PO Line Summary page opens.
- 3 In the **Additional** section, select the **Routing during receiving** and/or **Binding during receiving** check box.



The screenshot shows the 'Additional' section of the PO Line Summary page. It includes fields for 'Associated PO Lines', 'Source type' (Manual Entry), 'Created By' (admin1 (11/01/2012)), and 'Manual Packaging'. Two check boxes are highlighted with red boxes: 'Routing during receiving' and 'Binding during receiving', both of which are checked.

Figure 15 – Routing and Binding During Receiving Check Boxes

- 4 Select **Save** in the drop-down list on the bottom right side of the page, and click **Go**.
- 5 On the Receive New Material page (**Acquisitions > Receiving and Invoicing > Receive**), locate the PO line to which you assigned **Routing during receiving** or **Binding during receiving**.

Receive New Material

Find PO lines for Receiving

Status: All (Except Cl) Locate Order Lines Vendor Find: 62023 In: All Orders with interested users  Go

Shelf Ready

Receiving Settings

Received Date: 12/05/2014

Keep in Department

One Time  Continuous

Waiting for Receiving PO lines list

1 - 1 of 1 Records Tools

#	Item description	Status	Locations	# Ordered	Date Sent	Next Step	Rush	Notes	Interested Users	Actions
1	POL-62023 The history journal.. National University of Singapore History Society. 1993/1994-. 0144-2791. ISSN	In Review	Education Library - Educ Teaching Center (1)	1	-	-				Actions

Figure 16 – Receive New Material Page

- 6 Select **Actions > Receive** for the PO line. A confirmation message displays, informing you that the order is marked for routing or binding.

Confirmation Message

Confirmation Message

**i** This order is Marked for Routing - You may need to print the interested users before continuing to the next step.

Are you sure you want to perform this action?

Cancel Confirm

Figure 17 – Confirmation Message — Marked for Routing

Confirmation Message

Confirmation Message

**i** This order is Marked for Binding - You may need to send the item for binding.

Are you sure you want to perform this action?

Cancel Confirm

Figure 18 – Confirmation Message — Marked for Binding

---

**Note:** To print a list of interested users (for PO lines that are Marked for Routing), select **Actions > Print Interested Users List** for the relevant PO line.

---

# PDA Alerts

## Description

New functionality has been added to Patron Driven Acquisition (PDA) configuration. It is now possible to configure an alert percentage so that an email notification is sent to a contact person when the PDA usage exceeds the alert percentage of the budget threshold. For example, if the budget threshold is \$1000 and the alert percentage is 75, an email notification is sent when the PDA usage exceeds \$750.

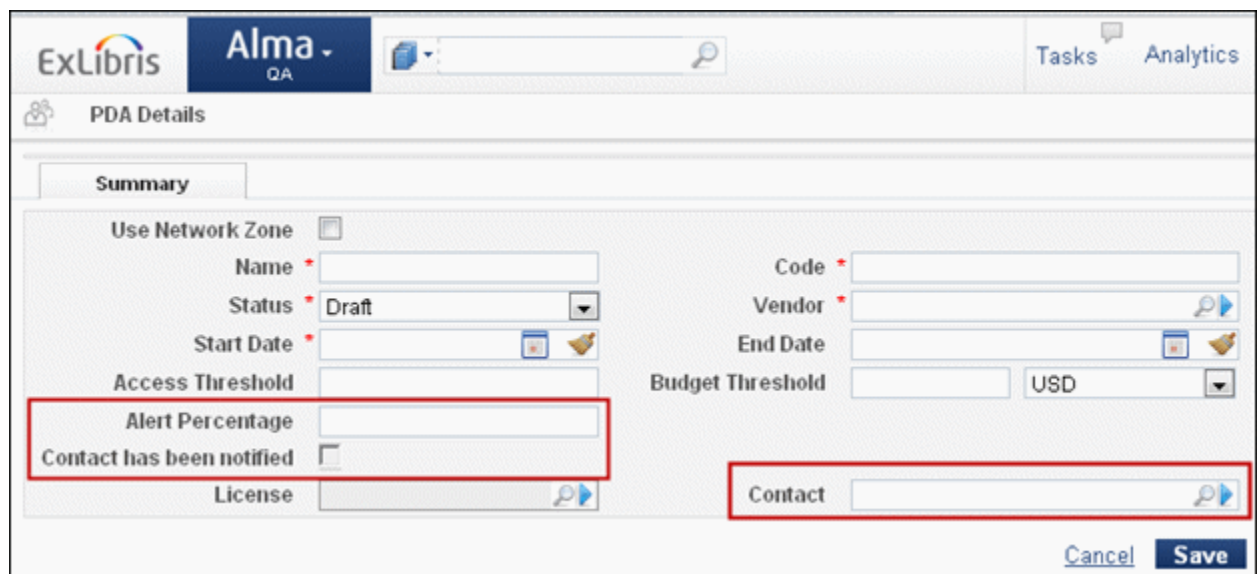
## Technical Instructions

The following roles can configure the PDA alert percentage:

- Purchasing Operator
- Purchasing Manager

### To configure the PDA alert percentage:


- 1 On the Patron Driven Acquisition (PDA) List page (**Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)**), click **Add PDA**. The following is displayed.



The screenshot shows the 'PDA Details' form in the Alma system. The form is titled 'PDA Details' and has a 'Summary' tab selected. The form contains several fields: 'Use Network Zone' (checkbox), 'Name' (text box), 'Status' (dropdown menu set to 'Draft'), 'Start Date' (calendar icon), 'Access Threshold' (text box), 'Alert Percentage' (text box, highlighted with a red border), 'Contact has been notified' (checkbox), 'License' (text box with search icon), 'Code' (text box), 'Vendor' (text box with search icon), 'End Date' (calendar icon), 'Budget Threshold' (text box), 'USD' (dropdown menu), and 'Contact' (text box with search icon, highlighted with a red border). At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 19 – Alert Percentage

- 2 Fill in the fields as describes in the **Patron Driven Acquisitions** section of the *Alma Acquisitions Guide* or Alma online help, including a budget threshold.
- 3 In the **Alert percentage** text box, enter a percentage. An email is sent when this percentage is exceeded.

- 4 In the **Contact** text box, enter a contact or click the **Find** icon  and select a contact.
- 5 Click **Save**.

When the alert percentage has been exceeded, an email such as the following is sent to the contact and a check mark appears in the **Contact has been notified** check box.

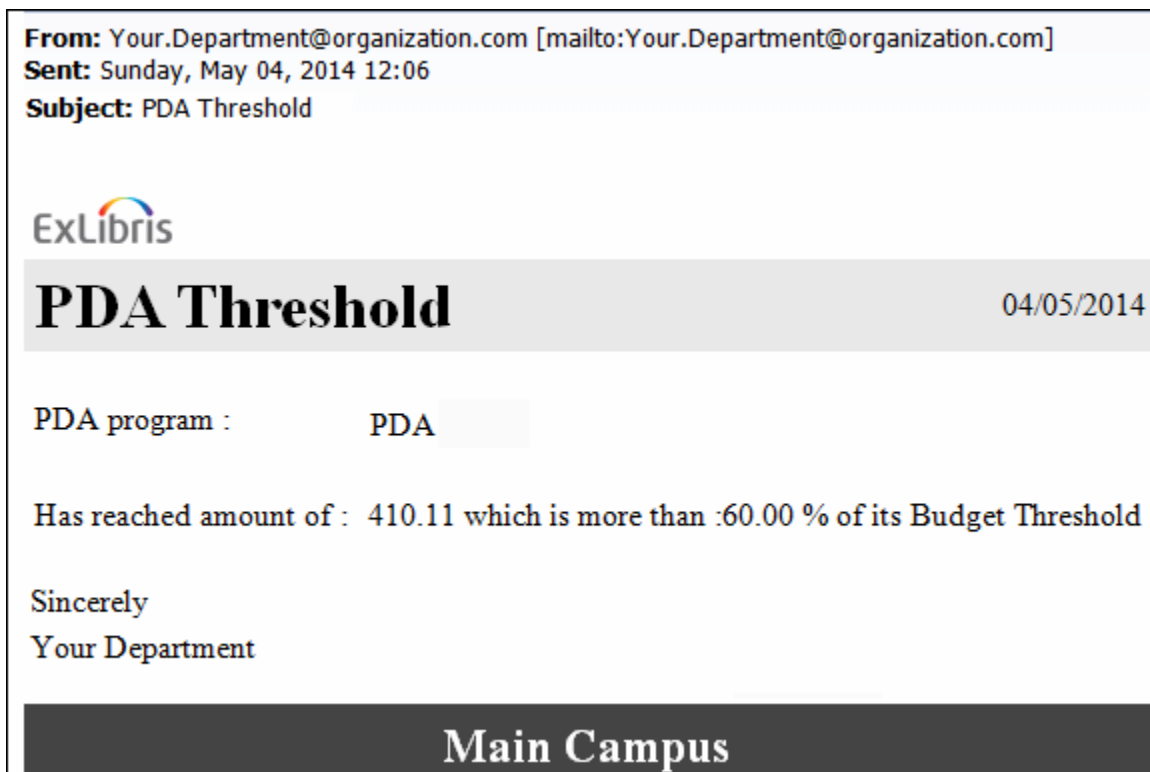


Figure 20 – PDA Threshold Email Notification

If the budget threshold or the alert percentage is changed, the **Contact has been notified** check box is cleared and another email notification is sent when the alert percentage is exceeded.

---

**Note:** Only one email notification is sent when the alert percentage is exceeded unless the percentage is changed.

---

## Information Added to Communication Letter to Vendor

### Description

Text containing the information of the PO line has been added to the letter that Alma sends to a vendor.

**To view the communication letter to the vendor:**

- 1 In the Communications tab of a PO line, click **Start Communication**. Details of the letter are displayed.


**Start Communication: Implementor, Ex Libris (2014-05-04)**

Type:

Subject \*:

Body \*:   
Order Line Reference Number: POL-201  
Title: 051113105002rep Order16aAutomation doron 051113105002 & 7Noble Library of Essential Reading .  
Author: doronava19add 051113105002 iltest, Wallis E. A. .  
Publication Date: 2005.  
Publication Place: [S.I.] :  
Publisher: Dorons 051113105002 doronavailtest & Noble  
Identifier: 051113105002  
Vendor Reference Number: VendorRefNum\_051113105002  
Order Date: 2014-03-24  
Total Price: 300.33 USD  
Unit Price: 100.11 USD  
No. of Units Arrived: 0  
No. of Units Ordered: 3

Add an attachment

File name:  

URL:

Notes:

**Figure 21 – Communication Letter Text**

- 2 Select a type from the drop-down list (for example, **Claim**). Last item received details are added to the letter.

The following is an example of the letter email.

ExLibris

**Conversation** 04/05/2014

0-123 Main Campus

**Dear Sir/Madam**

ConversationLetter  
 Order Line Reference Number: POL-201  
 Title: 051113105002rep Order16aAutomation doron 051113105002 & 7Noble Library of Essential Reading  
 Author: doronava19add 051113105002 iltest, Wallis E. A. .  
 Publication Date: 2005.  
 Publication Place: [S.I.] :  
 Publisher: Dorons 051113105002 doronavailtest & Noble  
 Identifier: 051113105002  
 Vendor Reference Number: VendorRefNum\_051113105002  
 Order Date: 2014-03-24  
 Total Price: 300.33 USD  
 Unit Price: 100.11 USD  
 No. of Units Arrived: 0  
 No. of Units Ordered: 3

Sincerely  
 Acquisitions Department

**Main Campus**

Figure 22 – Communication Letter Email

## Relinking Bibliographic Records for Continuous PO Lines

### Description

It is now possible to relink the bibliographic record to which a PO line is linked for continuous orders (subscriptions), thereby moving the inventory to a different bibliographic record. Until now, it was possible to change (relink) the bibliographic record to which a PO line is linked only for one-time PO lines.

In addition, any relinking that takes place from the List of Holdings (in Resource Management) also updates the bibliographic record to which the associated PO line is linked.

## Technical Instructions

The following roles can change the bibliographic record to which a PO line is linked for continuous orders:

- Purchasing Manager
- Purchasing Operator

### To change the bibliographic record to which a PO line is linked and move the inventory for continuous orders:

- 1 On the PO Lines in Review page (**Acquisitions > Purchase Order Lines > Review**), click **Relink** for a PO line with a Physical – Subscription order type.

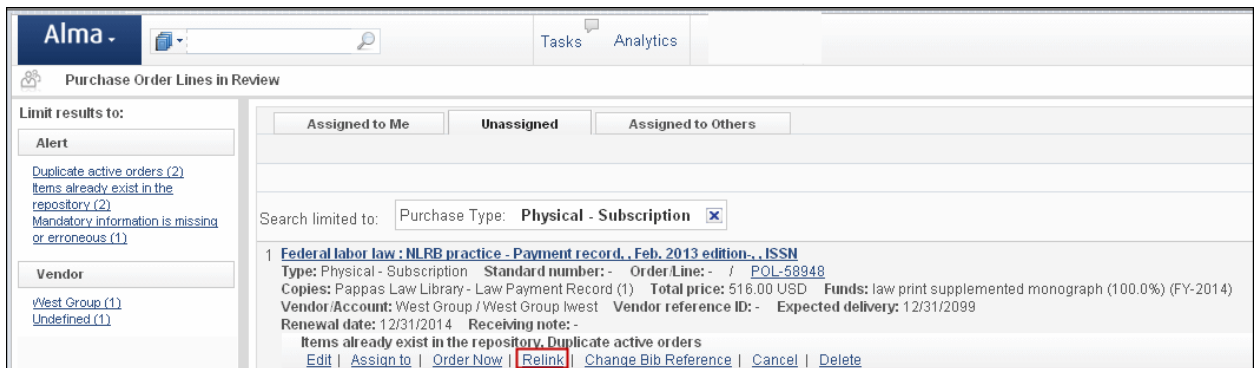


Figure 23 – Relink

This option is also available from the drop-down list at the top of the PO Line Summary page when editing PO lines with a Physical – Subscription order type (**Acquisitions > Purchase Order Lines > Review > Edit**).

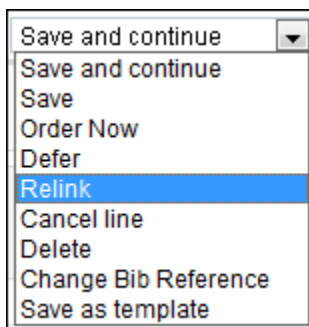


Figure 24 –Relink

The following is displayed.

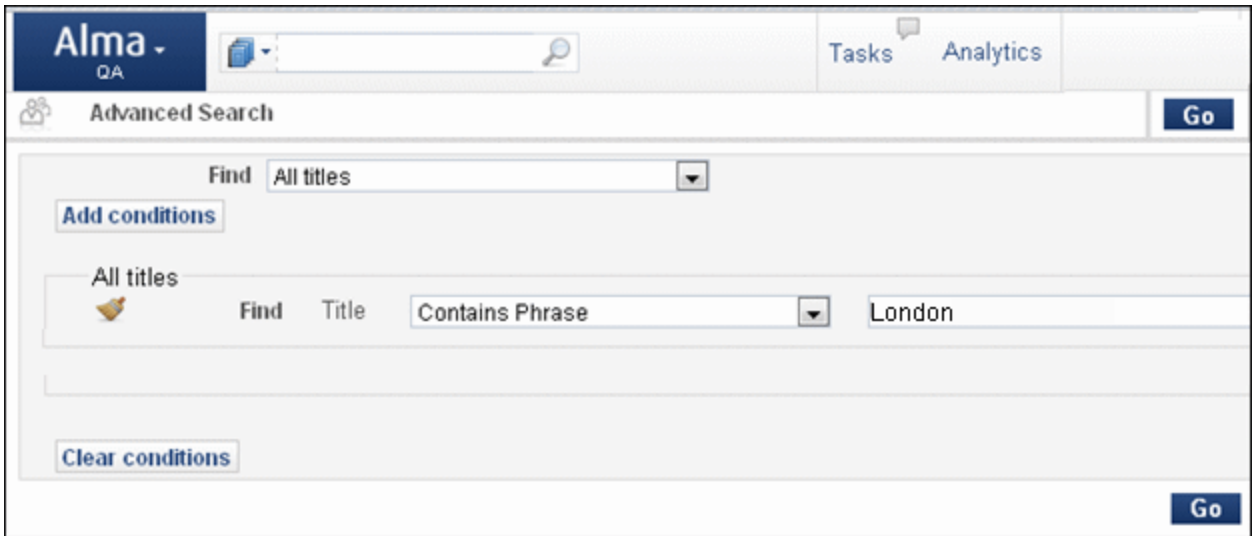


Figure 25 – Advanced Search

- 2 Search for the bibliographic record to which you want to link the PO line. A page such as the following is displayed.

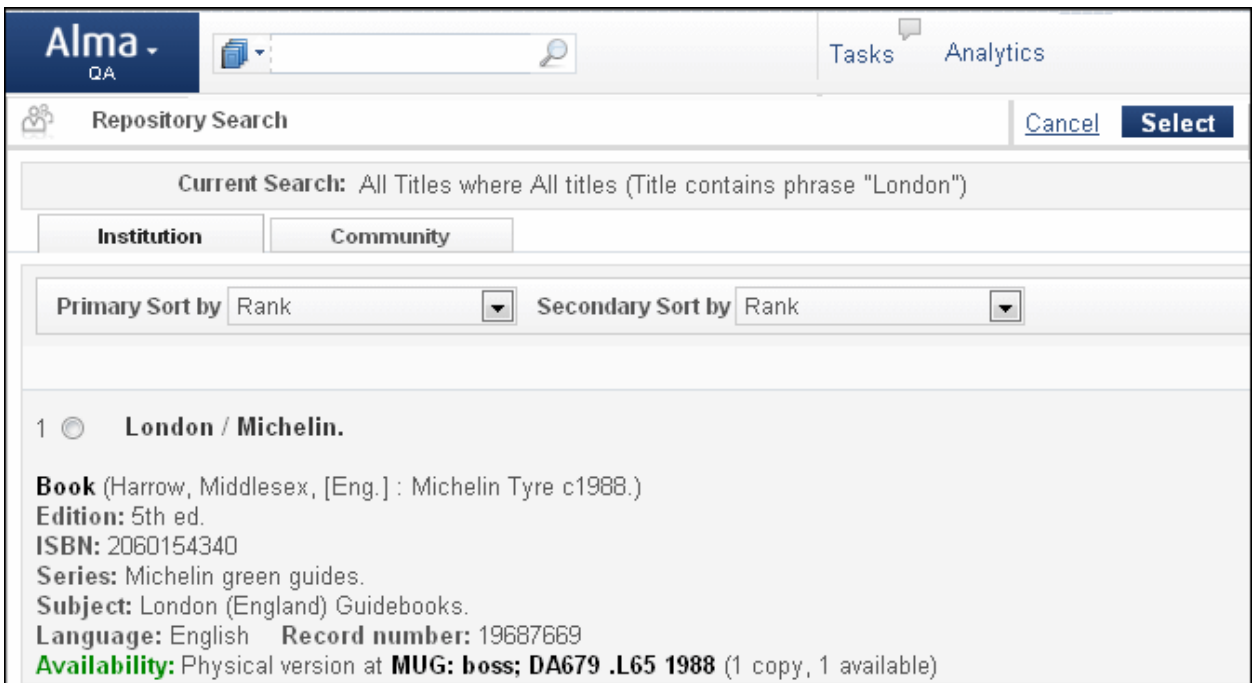


Figure 26 – Repository Search

- 3 Select the bibliographic record to which you want to link the PO line and click **Select**. A confirmation message similar to the following is displayed, containing information about the new link you want to create, including the number of items to be moved to the alternative bibliographic record.

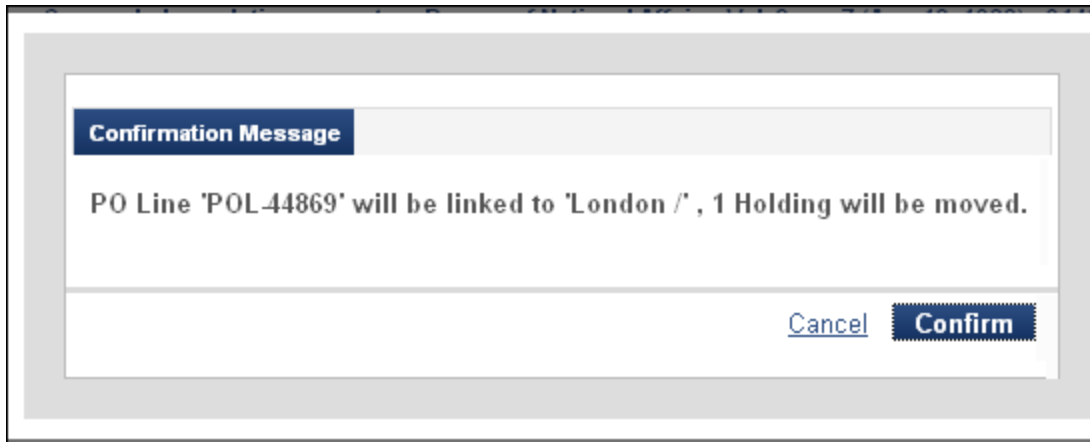
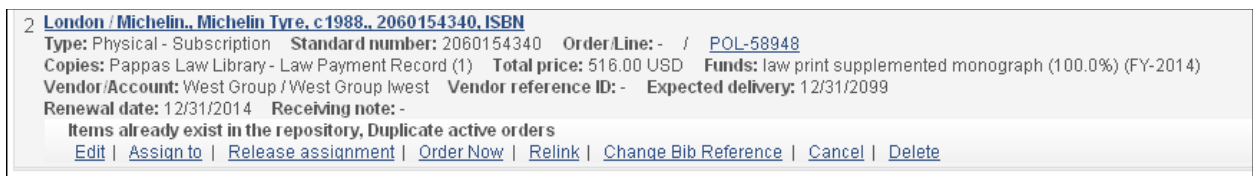


Figure 27 – Confirmation Message – Relink

- 4 Click **Confirm** to relink the bibliographic record and move the inventory.



## Changing Bibliographic Record References for PO Lines

### Description

It is possible to change the bibliographic record reference of a PO line to a different bibliographic record without changing the inventory.

### Technical Instructions

The following roles can change bibliographic record references for PO lines:

- Purchasing Manager
- Purchasing Operator

**To change the bibliographic record to which a PO line is linked without moving the inventory:**

- 1 On the PO Lines in Review page (**Acquisitions > Purchase Order Lines > Review**), click **Change Bib Reference** for a PO line that is associate with a bibliographic record.

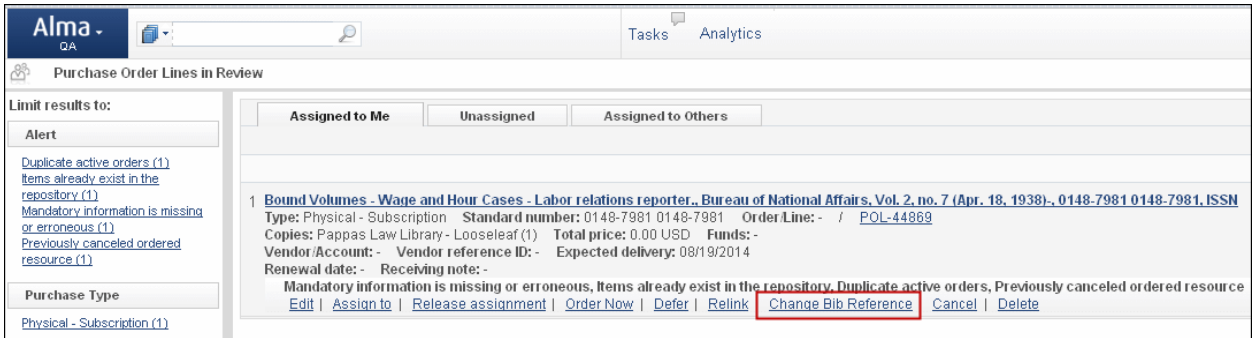


Figure 28 – Change Bib Reference

This option is also available from the drop-down list at the top of the PO Line Summary page when editing PO lines associated with a bibliographic record (**Acquisitions > Purchase Order Lines > Review > Edit**).

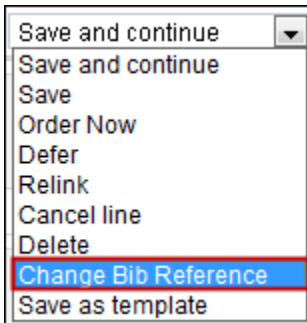


Figure 29 –Change Bib Reference

A confirmation message such as the following is displayed.

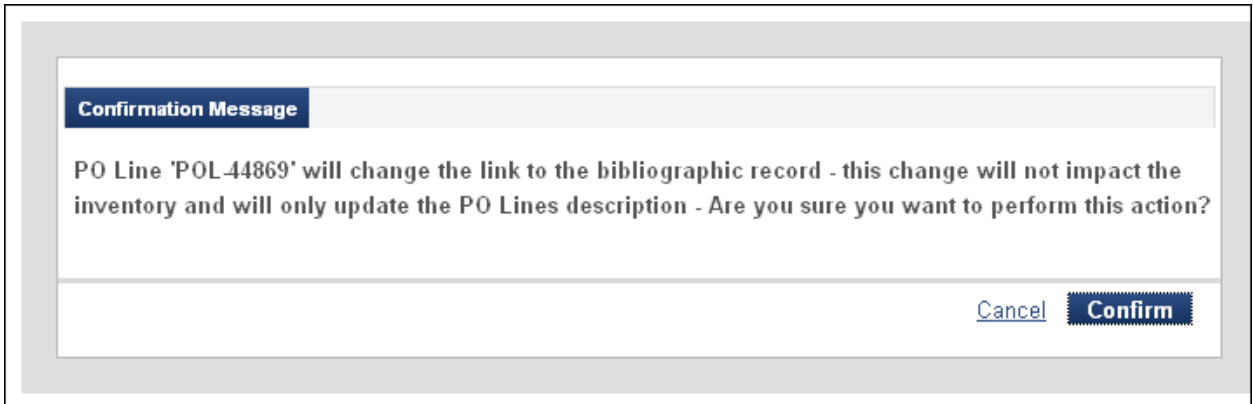


Figure 30 – Confirmation Message – Change Bib Reference

2 Click **Confirm** to change the bib reference. The following is displayed.

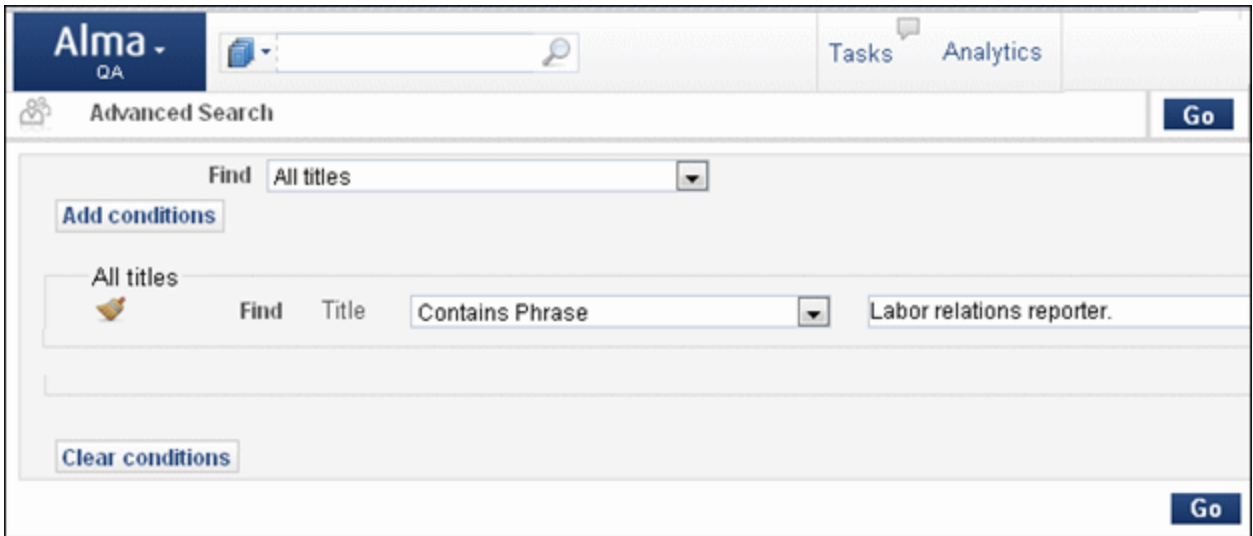


Figure 31 – Advanced Search

- 3 Search for the bibliographic record to which you want to change the bib reference. A page such as the following is displayed.



Figure 32 – Repository Search

- 4 Select the bibliographic record to which you want to change the bib reference and click Select. The bib reference is modified.

PO Line 'POL-44869' Links to title 'London / Michelin.' , Mms Id '99181767270001161'.

Limit results to:

Alert

Duplicate active orders (1)  
 Items already exist in the repository (1)  
 Mandatory information is missing or erroneous (1)  
 Previously canceled ordered resource (1)

Purchase Type

Physical - Subscription (1)

Assigned to Me    Unassigned    Assigned to Others

1 **London / Michelin., Michelin Tyre, c1988., 0148-7981 0148-7981, ISBN**  
 Type: Physical - Subscription    Standard number: 0148-7981 0148-7981    Order Line: - / [POL-44869](#)  
 Copies: Pappas Law Library - Looseleaf (1)    Total price: 0.00 USD    Funds: -  
 Vendor/Account: -    Vendor reference ID: -    Expected delivery: 08/19/2014  
 Renewal date: -    Receiving note: -  
 Mandatory information is missing or erroneous, Items already exist in the repository, Duplicate active orders, Previously canceled ordered resource  
[Edit](#) | [Assign to](#) | [Release assignment](#) | [Order Now](#) | [Defer](#) | [Relink](#) | [Change Bib Reference](#) | [Cancel](#) | [Delete](#)

Figure 33 – New Bib Reference

## Created By and Last Updated By Pop-Up for Invoices and Invoice Lines

### Description


A pop-up showing the Created By and Last Updated By information for invoices and invoice lines is now displayed on the Invoice Details and Invoice Line Details pages. Only information of Alma users is displayed.

### Technical Instructions

The following roles can view the Created By and Last Updated By information pop-up.

- Invoice Operator
- Invoice Manager

#### To view the Created By and Last Updated By pop-up:

- 1 On the Invoice Details page (**Acquisitions > Receiving and Invoicing > Review**), click the **Created By** or **Last Updated By** icon . The Created By or Last Updated By pop-up is displayed for the invoice.

ExLibris Alma QA

Invoice Details

Invoice Number PO-27926

Summary Alerts Invoice Lines Notes Attachments

Invoice Number \* PO-27926

Total amount \* 10.00 USD

Vendor \* 0-150

Vendor Contact Person -

Invoice Reference #

Created By ex\_impl (05/05/2014)

Approval Status

**Additional Charges**

Use Pro rata

Shipment amount

Insurance amount

**VAT**

Report Tax

VAT per invoice line

VAT % 0.0

Amount 0.0

Vendor tax (local currency)

**Pop-up Window:**


Name Implementor, Ex Libris

Primary Identifier ex\_impl

Email Address [nosuchmail@no\\_such.mail.com](mailto:nosuchmail@no_such.mail.com)

Phone Number

Figure 34 – Created By Pop-Up – Invoices

- 2 Click the **Invoice Lines** tab. The Invoice Line Details page is displayed.
- 3 Click the **Created By** or **Last Updated By** icon . The Created By or Last Updated By pop-up is displayed for the invoice line.

ExLibris Alma QA

Invoice Line Details

Invoice Number PO-27926

**Invoice Line Details**

Type Regular

PO line POL-67463

Title 051113105003rep Order16aAutomation Ortal book

PO line price 10.00 USD

Price 10.00 USD

Total Price 10.00 USD

Quantity 2

Reporting Code

Note

Invoice amount 10.00 USD

Created By exl\_impl (05/05/2014)

**Funding**

Quick Add

Fund

0.0 0.00 USD Add Fund

**Name** Implementor, Ex Libris

**Primary Identifier** exl\_impl

**Email Address** [nosuchmail@no.such.mail.com](mailto:nosuchmail@no.such.mail.com)

**Phone Number**

Figure 35 – Created By Pop-Up – Invoice Lines

# Resource Management

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

## Files Processed Column Added to Import Monitoring

### Description

The June release extends the monitoring page of the metadata import jobs (**Resource Management > Import > Monitor and View Imports**) to include additional indicators and information for each job listed:

- A progress bar showing percentages of completion for each job
- A pop-up menu containing counts of the stages and statuses of the files in the import job

The new progress and statistics appear under a new column, **Files Processed**. Users click an ellipsis (...) button to view the counts. (See the figure below.)

The new information appears on the Monitor and View Imports page as well as the Job History page.

The screenshot shows the 'Job History' page with the following details:

- Profile Details:** Profile Name: Alliance on-site visit - Electronic; Profile Description: -; Profile Type: Repository; Status: Active.
- Job History List:** Filter: All; Find: [ ]; in: All; Go; Refresh; 1 - 4 of 4 Records; Tools.
- Table:**

Job ID	Status	User	Time Star	Time End	Files Processed	
2329171900...	Manual Handling Required	admin1	2014-04-04 00:20:29	-	0%	[Progress Bar] Actions
2328912330...	Completed Successfully	admin1	2014-03-27 11:00:34	2014-03-27 11:10:27	100%	[Progress Bar] Actions
2328887300...	Completed Successfully	admin1	2014-03-27 10:44:40	2014-03-27 10:53:18		
2328846300...	Completed Successfully	admin1	2014-03-27 10:33:29	2014-03-27 10:42:16		
- Dropdown Menu (for Job ID 2328912330...):**
  - Finished 1
  - Failed 0
  - Rejected 0
  - Error 0
  - Handling
  - Match 0
  - Handling
  - Validation 0
  - Handling
  - Additional 0
  - Services
  - Processing
  - Commit 0
  - Validating 0
  - Loading 0
  - Pending 0
  - Total Files 1

Figure 36 –Job History Page with Percent of Job Processed and Counts for Files

## Technical Details

To work with import jobs on the Monitor and View Imports page or the Job History page, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator
- Acquisitions Administrator
- System Administrator

To view all of the jobs that have been monitored on your system, use the following path: **Resource Management > Import > Monitor and View Imports**.

To view imports for one job at a time, access the Job History page for that job using the following path: **Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles**, then select **Job History** from the **Actions** drop-down button of the job's row.

You can also narrow the list of jobs returned by accessing the Monitor and View Imports page and performing a search or applying a filter to the list of import jobs.

## Improvements to MD Import Reports

### Description

Alma provides a newly organized, extended report format with counts ordered into logical groupings and additional categories and statistics provided depending on the type of import material and job results.

Within the new report options, you can view the bibliographic records related to a result, create an itemized set for one row of results, or download sources as XML or binary files.

**Job Report**

Process ID 2328912330000121      Name Metadata Import: Alliance on-  
Electronic

Started on 27/03/2014 11:00:34 IST      Finished on 27/03/2014 11:10:27 IST  
Total run time 9 Minutes 52 Seconds      Created by admin1  
Status Completed Successfully      Status date 27/03/2014 11:10:27 IST

Files Processed 1      Records with exceptions 0

**Counters**

Total records processed 34  
Total records imported 24  
Total records deleted 0  
Total records not imported/deleted 10  
Total electronic portfolios processed 24  
Total electronic portfolios imported 24

**Bibliographic Record Matches** Tools

Same actions available for all list items;  
however, items with no records will  
not process

		Actions
Matches found	8	Preview records Create itemized title set Download sources (XML) Download sources (binary)
Multi Matched found	0	
Multi-matches resolved automatically	0	
Multi-matches skipped	0	

**Bibliographic Records Imported** Tools

		Actions
Total records imported	24	
Imported records upon no match	16	
Unlinked from CZ	0	
Merged records	8	
Merged records (manually)	0	
Overlaid records	0	
Overlaid records (manually)	0	
Newly added records	16	
Newly added records (manually)	0	
Headings calculated	219	

**Records Not Imported**

**Electronic Portfolios**

[Back](#)

Figure 37 - New Report Actions, Some Report Segments Expanded

## Technical Details

The following roles can view the new reports and work with links to the files they reference:

- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator
- Acquisitions Administrator
- System Administrator

### To view the new metadata import report:

- 1 On the Job History page (**Resource Management > Import > Monitor and View Imports or Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Actions > Job History**), find the row containing the job/job ID you want to view and select **Actions > Report**.

A version of the report for the job opens. (This view is the former layout and will be discontinued as soon as the transition to the newer version is established.)

Job Report		<a href="#">Back</a>	
Process ID	2328912330000121	Name	Metadata Import: Alliance on-site visit
Started on	27/03/2014 11:00:34 IS	Finished on	27/03/2014 11:10:27 IST - Electronic
Total run time	9 Minutes 52 Seconds	Created by	admin1
Status	Completed Successfully	Status date	27/03/2014 11:10:27 IST
Files Processed	1	Records	
<a href="#">View Alternative Report</a>		with exceptions	0
<b>Counters</b>			
Number of records processed	34		
Number of matches found	8		
Number of records added	18		
Number of records not added	10		
			<a href="#">Download records which were not added due to validation issues (10)</a>
Multi Matched Solved	0		
Number of records merged	8		
Number of records skipped merge	0		
Number of records overlaid	0		
Number of records skipped overlay	0		
Number of linked records overlaid/merged	0		
Total records marked for delete	0		
Number of locked records overridden	0		
Number of records deleted	0		
Total POLines number	0		
Number of polines created	0		
Number of polines updated	0		
Total number of inventory resources	24		
Number of inventory resources created	24		
Number of headings created	219		
Failed to update, linked to CZ	0		
Bibliographic records with portfolios linked to CZ	0		

Figure 38 - Job Report, Old Format

2 Click View Alternative Report.

The newly formatted report opens.

The screenshot displays a 'Job Report' interface. At the top, it shows 'Process ID 2328912330000121' and 'Name Metadata Import: Alliance on-site visi Electronic'. Below this, it lists 'Started on 27/03/2014 11:00:34 IST', 'Finished on 27/03/2014 11:10:27 IST', 'Total run time 9 Minutes 52 Seconds', 'Created by admin1', 'Status Completed Successfully', and 'Status date 27/03/2014 11:10:27 IST'. It also indicates 'Files Processed 1' and 'Records with exceptions 0'. A 'Counters' section lists: 'Total records processed 34', 'Total records imported 24', 'Total records deleted 0', 'Total records not imported/deleted 10', 'Total electronic portfolios processed 24', and 'Total electronic portfolios imported 24'. Below the counters are four expandable sections: '+ Bibliographic Record Matches', '+ Bibliographic Records Imported', '+ Records Not Imported', and '+ Electronic Portfolios'. A red arrow points from the text 'This section always shows' to the 'Counters' section. Another red arrow points from the text 'These sections vary according to material type and import results' to the four expandable sections. A 'Back' link is visible in the top right and bottom right corners.

Figure 39 - New Job Report (June 2014)

The segments included in the report can be opened and closed by clicking the plus and minus signs in the left side of the header. Only relevant headings appear in the report.

- 3 To preview records, create a set from the results, or download the results as XML or binary files, find the row containing the records you want to work on, and click the **Actions** button. (Then see the procedures below.)

**To preview the records from a row of the results:**

- 1 Select **Actions > Preview records** for the row containing the information you want to preview.

Alma returns a list of bibliographic records to which the row refers. (See figure below.)

Bibliographic Records Imported		
Total records imported	62	<a href="#">Actions</a>
Imported records upon no match	35	<a href="#">Actions</a>
Unlinked from CZ	0	<a href="#">Actions</a>
Merged records	27	<a href="#">Actions</a>
Merged records (manually)	0	<a href="#">Preview records</a>
Overlaid records	0	<a href="#">Show the first 50 results in the repository</a>

Repository Search

Current Search: All Titles where All titles (MMS ID equals "99106910000121" or MMS ID equals "99106909800121" or MMS ID equals "99106909700121" or MMS ID equals "99106909500121" or MMS ID equals "99106909400121" or MMS ID equals "99106909100121" or MMS ID equals "99106908900121")

Institution: Community

Limit results to:

Inventory

Collection

Electronic title

Digital title

Physical title

Material Type

Rank (27)

Primary Sort by Rank Secondary Sort by Rank

1 [A grammar of the Pukhto, Pushto, or, Language of the Afghans : in both poetical and prose, together with translations from the articles of Afghani tribes / by H.G. Raverty.](#)  
**Book** By Raverty, H. G. (Peshawar, Pakistan : De Chapzai 1981.)  
 Subject: Pushto language Grammar.  
 Language: English Record number: (OCoLC)ocm17295886  
**Availability:** [Physical version](#) at **BAPST: RES; PK6721 .R3 1981** (2 copies, 2  
[Electronic version](#) at Online: Full Text

Figure 40 - New Report, Link to Records in Repository Search

- From the Repository Search page, perform any actions available to the item and to your role. (The below example clicks **Edit** for the first record returned.)

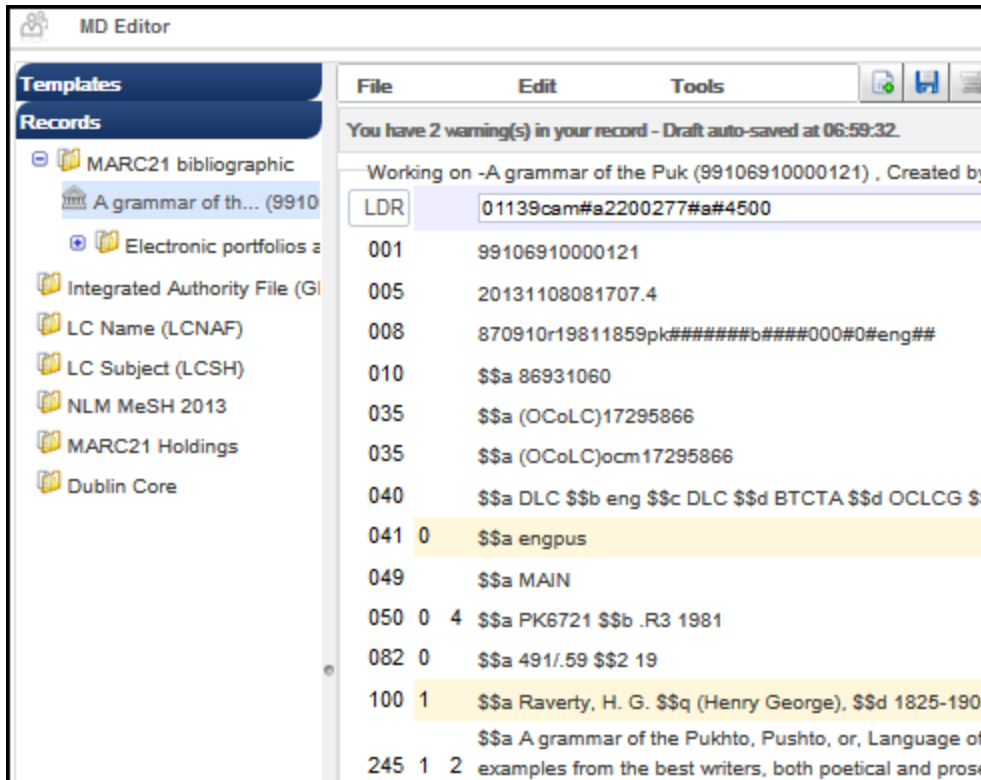


Figure 41 - Metadata Editor for Record Selected Through Report

### To create a set of records from an import job report:

- 1 From the new report, find the line containing the items you want to include in the set. (For example, merged records in Figure 40 - New Report, Link to Records in Repository Search.)
- 2 Select **Actions > Create** itemized title set.

The Set Details page opens. The default name for the set appends the date and time to the name of the job (see figure below).

Bibliographic Records Imported		
Total records imported	62	Actions
Imported records upon no match	35	Actions
Unlinked from CZ	0	Actions
Merged records	27	Actions
Merged records (manually)	0	Preview records
Overlaid records	0	Create itemized title set
Overlaid records (manually)	0	Download sources (XML)
Newly added records	35	Create an itemized set of the relevant
Newly added records (manually)	0	Actions

Set Details Cancel Submit

Set name Merged Set type Itemized  
records\_29/04/2014 16:01:32 IDT

**General Information**

Set name \* Merged records\_29/04/2014 16:01:32 IDT

Description

Note

Set content type All Titles Private  No  Yes

Status  Active  Inactive Status date 29/04/2014 16:01:32 IDT

Created by Ex Libris Updated by Ex Libris

Cancel Submit

Figure 42 - Create Itemized Title Set > Set Details Page

3 Complete the fields as you would for any itemized set, then click the **Submit** button.

Merged records\_29/04/2014 16:01:32 IDT

Merged records

All Titles

Active

Ex Libris

Updated by Ex Libris

**Confirmation Message**

Submitting this process will create an itemized set with 27 members. Do you want to proceed?  
Note: Counts are approximate for large sets

Cancel Confirm

Figure 43 - New Itemized Set, Confirmation Message

The confirmation box closes and Alma returns you to the Report page, where a message informs you that the job was submitted. The set is created in Alma and can be used immediately.

#### To download an XML or binary file:

From the new report, select **Actions > Download sources (XML)** or **Actions > Download sources (binary)** for the row containing the source file you want to view and/or edit. The source downloads as a compressed file. To view or edit, unzip the file and open it in an XML or plain text editor or the program you use to work with binary files.

## Import Profiles – Miscellaneous Enhancements

Several improvements and clarifications to the Alma UI have been made, primarily changes to the text that refine meaning. Among the changes:

- Step 2 of the Import Profile wizard: **Load file source** has been changed to **File Upload Method**.
- Step 3 of the Import Profile wizard: For validation exception profile, the phrase **Check the data using** has been changed to **Handle invalid data using**.
- Step 7 of the Import Profile wizard: For importing an EOD file as part of a New Order import type, the field **PO Line Field** has been replaced by **Additional PO Line Reference** in order to match the field in the PO line.

## Publishing Profile for PubMed

### Description

With the June release, Alma provides an additional publishing profile – one specifically for PubMed. This publishing profile enables you to share with PubMed your electronic journal inventory that is relevant to PubMed. By sharing this information with PubMed, PubMed will be able to provide a visual indication for the PubMed titles to which the library has full-text access and provide access to them using the Alma Link Resolver.

You can identify/customize the following PubMed details in the PubMed publishing profile:

- Your PubMed ID
- URL that identifies the icon/graphic file that displays in the PubMed search results
- Text for the link label that displays in the PubMed search results

- Primo base URL/Alma Link Resolver base URL for accessing the resource from the PubMed search results.

The XML file generated from Alma for publishing to PubMed includes:

- PubMed ISSNs (or EISSNs) available in the Alma inventory
- Coverage information (from year/to year) as available
- Embargo/rolling year information as available

## Technical Instructions

The following roles can customize the PubMed publishing profile:

- Catalog Administrator
- Repository Administrator
- General System Administrator

### To configure a PubMed Publishing Profile:

- 1 Access the Publishing Profiles page (**Resource Management > Resource Configuration > Configuration Menu > Record Export > Publishing Profiles**).
- 2 Select **Actions > Edit** for the **Publish electronic record to PubMed** publishing profile. The Publishing Profile Details page opens for the PubMed publishing profile.

The screenshot shows the 'Publishing Profile Details' page for the profile 'Publish electronic record to PubMed'. The page is divided into several sections:

- Profile Details:** Profile name: Publish electronic record to PubMed; Profile description: Synchronize electronic records with PubMed.
- Submission Format:** FTP configuration (dropdown), Sub-directory (text input), File name prefix (text input).
- Status:** Active (selected) / Inactive (radio buttons); Scheduling: Not scheduled (dropdown).
- PubMed Details:** Provider ID (text input), Location of Alma icon (text input), Link label (text input), Primo base URL (text input).

Buttons for 'Cancel' and 'Save' are visible in the top right corner.

Figure 44 - PubMed Publishing Profile Details Page

- 3 Complete the PubMed publishing profile configuration using the information provided in the table below.

Parameter	Description
Submission Format:	
FTP configuration	Select the FTP configuration to be used from the drop-down list of available FTP configurations. That is, select the FTP configuration that contains the appropriate server, port, user name, and password for the connection (refer to <b>Configuring S/FTP Definitions</b> in the <i>Alma Administration Guide</i> ).
Subdirectory	Specify the subdirectory in which the files should be placed for the FTP upload. For example, if you specified Alma in the subdirectory field for the S/FTP connection configuration, and you enter PubMed in this subdirectory field, the data is exported to the Alma/PubMed directory.
File name prefix	Enter the alphanumeric characters that you want to use as the prefix for the file name that is created. To this prefix, the system adds a sequence number (starting with 1) and a date suffix in the date/time format of YYYYMMDDhhmm and an extension of .xml.  When there are more than 50,000 records, the system creates a new file and the sequence number is incremented.
Status	Specify whether this is an active or inactive profile. In order for a publishing job to run using this profile, you need to indicate that this is an active profile.
Scheduling	Select the publishing schedule you prefer from the drop-down list of options.
PubMed Details:	
Provider ID	Enter the ID provided to you by PubMed.

Parameter	Description
Location of Alma icon	<p>Enter the URL address for displaying an Alma Link Resolver icon (or other icon/graphic file of your choice) in the PubMed search results. The following is provided:</p> <p>North America  <a href="http://alma.exlibrisgroup.com/view/link_resolver.gif">http://alma.exlibrisgroup.com/view/link_resolver.gif</a></p> <p>or</p> <p><a href="http://na01.alma.exlibrisgroup.com/view/link_resolver.gif">http://na01.alma.exlibrisgroup.com/view/link_resolver.gif</a></p> <p>Europe  <a href="http://eu.alma.exlibrisgroup.com/view/link_resolver.gif">http://eu.alma.exlibrisgroup.com/view/link_resolver.gif</a></p> <p>APAC  <a href="http://ap01.alma.exlibrisgroup.com/view/link_resolver.gif">http://ap01.alma.exlibrisgroup.com/view/link_resolver.gif</a></p> <p>This parameter is optional and will be published only when something is specified.</p>
Link label	Enter the text that you want used to identify the link's title in the PubMed results (such as Link to Alma).
Primo base URL/Alma Link Resolver base URL	<p>Enter the base URL for the Alma Link Resolver using the following format and inserting your institution's information where indicated:</p> <p><a href="http://&lt;primo server host:port&gt;/openurl/&lt;primo institution_code&gt;/&lt;primo view_code&gt;?">http://&lt;primo server host:port&gt;/openurl/&lt;primo institution_code&gt;/&lt;primo view_code&gt;?</a></p> <p>The label for this parameter will be changed to Alma Link Resolver base URL in the July release.</p>

4 Click Save.

## General Publishing Profile Enhanced

### Description

As a continuation of the general profile enhancements for publishing in May, the following additions/enhancements are being provided in the June release:

- Quick Add holdings mapping parameters
- New item mapping options
  - Public note subfield

- Fulfillment note subfield
- Internal note 1 subfield
- Internal note 2 subfield
- Internal note 3 subfield
- Statistics note 1 subfield
- Statistics note 2 subfield
- Statistics note 3 subfield
- PO line number subfield
- Due back date subfield

The general profile publishing configuration settings are applied to the All Titles set that you create/save first and then specify in the general profile that you create. Currently, data enrichment is provided for processing physical inventory records and electronic inventory records are targeted for support in July.

## Technical Instructions

The following roles can customize the PubMed publishing profile:

- Catalog Administrator
- Repository Administrator
- General System Administrator

### To access the new General profile enhancements:

- 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 Select the **Data Enrichment** tab.

Figure 45 - Data Enrichment Tab

- d Indicate that you want to add holdings information to the published bibliographic records and add your holdings mapping preferences.
  - i. Select the **Add holding information** check box.
  - ii. Enter your preferred mapping in the **Quick Add** section.

Figure 46 - Holdings Parameters on the Data Enrichment Tab

- iii. Click **Add**.

**Physical Inventory Enrichment**

Add Holdings information

**Quick Add**

Holding Tag  Holding Subfield  Bib Tag  Bib Subfield

Holding Tag	Holding Subfield	Bib Tag	Bib Subfield	
852	a	902	a	<input type="button" value="Delete"/>

Figure 47 - Holdings Mapping Added

- e View and add new item information.
  - i. Select the **Add items information** check box. The complete list of items that you can map to the bibliographic records that are published appears.
  - ii. Review the list and locate the new item information that you can add/map to the published bibliographic records.
  - iii. Add your preferred mapping.

Add Items Information

Repeatable field	<input type="text" value="949"/>	Barcode subfield	<input type="text" value="a"/>
Item PID subfield	<input type="text"/>	Material type subfield	<input type="text" value="b"/>
Copy ID subfield	<input type="text"/>	Item status subfield	<input type="text"/>
Item Policy subField	<input type="text"/>	Is Magnetic subfield	<input type="text"/>
Provenance subfield	<input type="text"/>	Enumeration B subfield	<input type="text"/>
Enumeration A subfield	<input type="text"/>	Chronology J subfield	<input type="text"/>
Chronology I subfield	<input type="text"/>	Process type subfield	<input type="text"/>
Description subfield	<input type="text"/>	Permanent location subfield	<input type="text"/>
Permanent library subfield	<input type="text"/>	Current location subfield	<input type="text"/>
Current library subfield	<input type="text"/>	Call number subfield	<input type="text"/>
Call Number type subfield	<input type="text"/>	Alternative call number subfield	<input type="text"/>
Alternative Call number type subField	<input type="text"/>	Temporary call number subfield	<input type="text"/>
Temporary Call number type subField	<input type="text"/>	Storage Location ID subField	<input type="text"/>
Inventory number subfield	<input type="text"/>	Pieces subfield	<input type="text"/>
Pages subfield	<input type="text"/>	Fulfillment note subfield	<input type="text"/>
Public note subfield	<input type="text" value="n"/>	Internal note 2 subfield	<input type="text"/>
Internal note 1 subfield	<input type="text"/>	Statistics note 1 subfield	<input type="text"/>
Internal note 3 subfield	<input type="text"/>	Statistics note 3 subfield	<input type="text"/>
Statistics note 2 subfield	<input type="text"/>	Due back date subfield	<input type="text" value="d"/>
PO line number subfield	<input type="text"/>		

[Cancel](#)

Figure 48 - Item Information Mapping

3 Click Save.

## Cascading Delete for Bibliographic Records

### Description

With the June release, you can delete a bibliographic record and its associated inventory in a single process when the bibliographic record passes the following system validation:

- No PO line is attached to the bibliographic record or its inventory
- No electronic collection or collection is associated with the bibliographic record

Until now, you had to handle the deletion of the inventory as a separate step prior to deleting the bibliographic record(s).

This delete capability is provided in the MD Editor (**File > Delete Record**) and when running a **Delete bibliographic records** job.

## Technical Instructions

The following roles are needed to process **Delete Record** requests:

- Physical Inventory Operator Extended
- Electronic Inventory Operator Extended

### To process a bibliographic record cascading delete using the MD Editor:

- 1 Open the bibliographic record you want to delete in the MD Editor.
- 2 Select **File > Delete Record**. The system displays a dialog box that indicates whether you can proceed (Yes/No) with your **Delete Record** request and what will be deleted, or it displays a dialog box with information explaining why your **Delete Record** request cannot be processed.

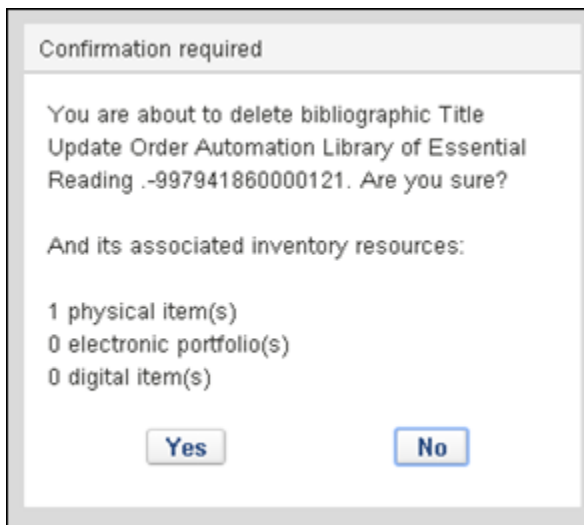


Figure 49 - Delete Record Request Can Be Processed

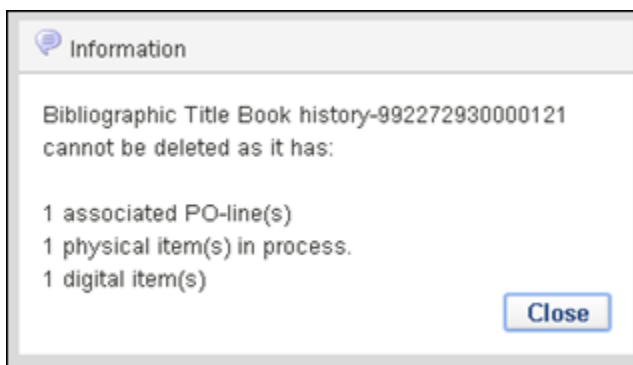


Figure 50 - Delete Record Request Cannot Be Processed

- 3 Click **Yes** to process your **Delete Record** request.

To process a bibliographic record(s) cascading delete when running a job:

- 1 Run the **Delete bibliographic records** job (Administration > Manage Jobs > Run a Job > Withdraw filter).

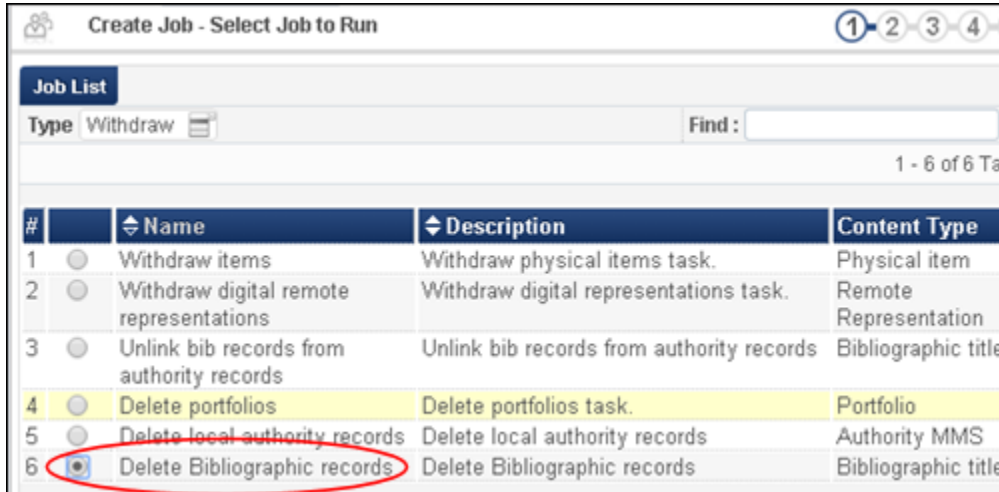


Figure 51 - Delete Bibliographic Records Job

- 2 Select **Delete all associated inventory resources** in step 3 of the wizard to process this job as a cascading delete job and complete the remaining run job request as you normally would.

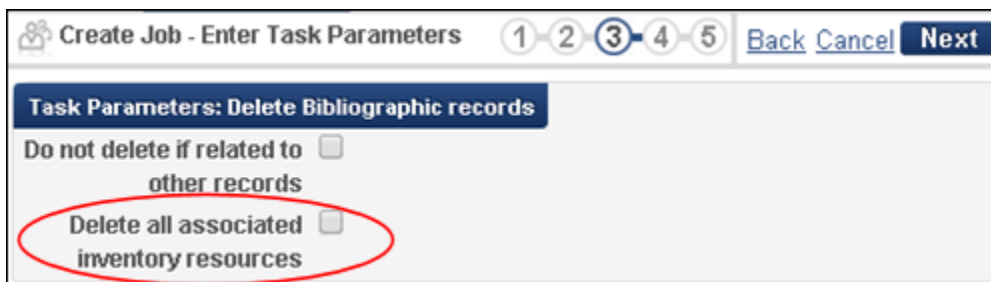


Figure 52 - Cascading Delete Option

In step 5 of the wizard, the **Delete all associated inventory resources** displays as **true** when you have selected this option in step 3.

1 2 3 4 5 Back Cancel Submit

**General Information**  
Job Name Delete Bibliographic records - ak test1\2 - 08/05/2014 08:24:49 PM IDT

**Set Information**  
Set ID 18923210000121  
Name ak test1\2

**Scheduling**  
Schedule As soon as possible

**Task Parameters: Delete Bibliographic records**  
Do not delete if related to other records false  
Delete all associated inventory resources true

Figure 53 - Job Request Summary/Step 5 of the Wizard

Review the job report when the job has completed running to see the details of what has been deleted/processed.

## History Tab Provided for Electronic Resources

With this release, a **History** tab has been added to the electronic collection, electronic service, and electronic portfolio editors. When an electronic resource is saved, the **History** tab information is updated. For each change that is saved, the following information is shown:

- Date of the change
- Operator that made the change
- Name of the field that was changed
- Old (previous) value
- New value

For fields that are blank/empty, a dash displays in the History tab columns.



Figure 54 - History Tab

You can also link to the operator details from the Operator column.



Figure 55 - Operator Details on the History Tab

## Community Zone Updates Task List Enhancements

The June release provides the following enhancements to the Community Zone Updates Task List:

- Portfolio coverage update filter/list

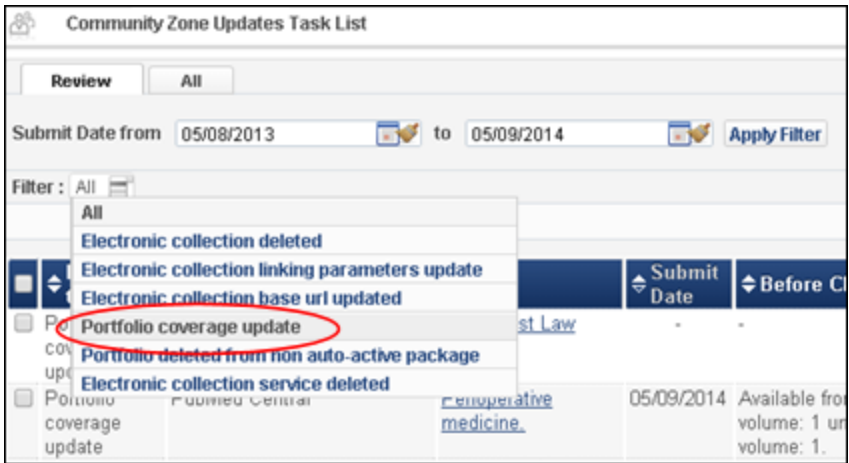


Figure 56 - Portfolio Coverage Update Enhancement

Community Zone Updates Task List

Review All

Submit Date from 05/08/2013 to 05/09/2014 Apply Filter

Filter: Portfolio coverage update

Report type	Electronic Collection Name	Title	Submit Date	Before Change
<input type="checkbox"/> Portfolio coverage update	HeinOnline Law Journal Library	<a href="#">North East Law Review</a>	05/09/2014	Available from 2013 volume: 1 until 2013 volume: 1.
<input type="checkbox"/> Portfolio coverage update	PubMed Central	<a href="#">Perioperative medicine.</a>	05/09/2014	Available from 2012 volume: 1 until 2012 volume: 1.
<input type="checkbox"/> Portfolio coverage update	HeinOnline Law Journal Library	<a href="#">Journal of payment systems law [1930-5176]</a>	05/09/2014	Available from 2005 volume: 1 until 2007 volume: 3 issue: 2.
<input type="checkbox"/> Portfolio coverage update	HeinOnline Law Journal Library	<a href="#">The Solicitors' journal [0038-1047]</a>	05/09/2014	Available from 1857 volume: 1 until 1940 volume: 84.

Figure 57 - Portfolio Coverage Update List

- Link, when available, for the resource in the **Electronic Collection Name** column that links to the appropriate Alma editor

Report type	Electronic Collection Name	Title	Submit Date	Before Change
Electronic collection linking parameters update	<a href="#">EBSCOhost American Antiquarian Society Historical Periodicals Collection: Series 4</a>	-	05/15/2014	<b>Linking params:</b> \$\$SHIBBOLETH \$\$CUSTOMER_ID <b>Parse param:</b> db_host=h9k&ebSCOhosturl = http://search.ebscohost.com & linkurl=http://openurl.ebscohost.com/linkurl & shib=\$\$SHIBBOLETH & customer_id=\$\$CUSTOMER_ID
Electronic collection linking parameters update	<a href="#">EBSCOhost American Antiquarian Society Historical Periodicals Collection: Series 3</a>	-	05/15/2014	<b>Linking params:</b> \$\$SHIBBOLETH \$\$CUSTOMER_ID <b>Parse param:</b> db_host=h9j&ebSCOhosturl = http://search.ebscohost.com & linkurl=http://openurl.ebscohost.com/linkurl & shib=\$\$SHIBBOLETH & customer_id=\$\$CUSTOMER_ID

Figure 58 - Electronic Collection Name Column with Links

**Electronic Service Editor**

Electronic Collection [EBSCOhost American Antiquarian Society Historical Periodicals Collection: Series 4](#)  
name

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

Service activation status  Not Available  Available

Activate new portfolios associated with service automatically?  No  Yes

Active From Date   Active Until Date

Service temporarily unavailable  No  Yes Service unavailable as of date

Service unavailability reason

Figure 59 - Electronic Collection Name Column Linking Result (Example from the First Row Above)

- Link, when available, for the resource in the **Title** column that links to the portfolio resource editor

Report type	Electronic Collection Name	Title	Submit Date	Before Change	After
Portfolio coverage update	HeinOnline Law Journal Library	<a href="#">North East Law Review</a>	-	-	-
Portfolio coverage update	PubMed Central	<a href="#">Perioperative medicine.</a>	05/09/2014	Available from 2012 volume: 1 until 2012 volume: 1.	Available volume:
Portfolio coverage update	HeinOnline Law Journal Library	<a href="#">Journal of payment systems law. [1930-5176]</a>	05/09/2014	Available from 2005 volume: 1 until 2007 volume: 3 issue: 2.	Available volume:
Portfolio coverage update	HeinOnline Law Journal Library	<a href="#">The Solicitors' journal. [0038-1047]</a>	05/09/2014	Available from 1857 volume: 1 until 1940 volume: 84.	Available volume:

Figure 60 - Title Column Links

Electronic Portfolio Editor

Resource description: [North East Law Review](#)

Electronic Collection name: [HeinOnline Law Journal Library](#)

Service Type: Full Text

Portfolio Information | Linking Information | Coverage Information | Notes | History

Which coverage statement will be applied?  ONLY local  global AND local  global OR local  ONLY global

Date Information

From Year	From Volume	From Issue	Until Year	Until Volume
2013	1		-	-

Figure 61 - Title Column Link Result (Example from the First Row Above)

- Before Change and After Change columns that replace the previous Change Notes column

Title	Submit Date	Before Change	After Change
<a href="#">North East Law Review</a>	05/09/2014	Available from 2013 volume: 1 until 2013 volume: 1.	Available from 2013 volume: 1.
<a href="#">Perioperative medicine.</a>	05/09/2014	Available from 2012 volume: 1 until 2012 volume: 1.	Available from 2012 volume: 1.
<a href="#">Journal of payment systems law. [1930-5176]</a>	05/09/2014	Available from 2005 volume: 1 until 2007 volume: 3 issue: 2.	Available from 2005 volume: 1 until 2007 volume: 3.
<a href="#">The Solicitors' journal. [0038-1047]</a>	05/09/2014	Available from 1857 volume: 1 until 1940 volume: 84.	Available from 1857 volume: 1 until 1943 volume: 87.

Figure 62 - Before Change and After Change Columns

- Addition of the Local Information column

Electronic Collection Name	Title	Submit Date	Before Change	After Change	Local Information
Cambridge University Press Current Complete	<a href="#">Kantian review [1369-4154]</a>	05/09/2014	Available from 1997 volume: 1.	Available from 2006 volume: 11.	Available from 1997 volume: 1.
Wiley Online Library 2013 Full Collection	<a href="#">Australian journal of entomology [1326-6756]</a>	05/09/2014	Available from 1997 volume: 36 issue: 1 until 2013 volume: 52 issue: 4.	Available from 1997 volume: 36 issue: 1.	-

Figure 63 - Local Information Column Added

The screenshot shows the 'Electronic Portfolio Editor' interface. The 'Coverage Information' tab is active. It displays a table for 'Date Information' with columns: From Year, From Volume, From Issue, Until Year, Until Volume, and Until Issue. The first row shows '2006' in 'From Year' and '11' in 'From Volume'. Below this, there is a section for 'Date Information (override)' with a 'Delete' button next to a row containing '1997' in 'From Year' and '1' in 'From Volume'. The 'Local Information' column from Figure 63 is highlighted in red in the original image, corresponding to the 'Date Information (override)' section in this screenshot.

Figure 64 - Local Information Example Details

The information in the **Before Change** and **After Change** columns represents the changes made globally as part of the Community Zone update process and the **Local Information** column identifies the local override information maintained by the library. Refer to the illustrations above.

## Portfolio Export/Import Enhancements

When you export/import electronic portfolios, the following is now included:

- Authentication notes

- Internal descriptions
- One of the following coverage statements that is selected on the Coverage Information tab in the Electronic Portfolio Editor:
  - Only local
  - Global and local
  - Global or local
  - Only global
- Option to export portfolios from the portfolio list of inactive packages
- Diacritics in titles

## Load Portfolios Delete Function Enhanced for Bibliographic Records

### Description

With the June release, the Load Portfolios feature in Alma now provides options to specify how to handle bibliographic records without inventory when you select the option to delete portfolios. One of the following handling options can be selected:

- Delete bibliographic record(s)
- Suppress bibliographic record(s)
- Do nothing

The screenshot shows the 'Activation Wizard: File Upload' interface. The 'Electronic Collection Information' section displays 'LexisNexis Academic' as the collection name, 'Aggregator package' as the type, and '17069' as the number of portfolios. The 'Select Loading Policy' section has 'Complete' selected as the loading policy type. Under 'Add Portfolios', the 'Delete portfolios' checkbox is checked and circled in red. A red box highlights the 'Handling bibliographic records without inventory' section, which contains a dropdown menu with the following options: 'Delete bibliographic record(s)', 'Delete bibliographic record(s)', 'Do nothing', and 'Suppress bibliographic record(s)'. The 'Do nothing' option is currently selected in the dropdown. 'Cancel' and 'Next' buttons are visible at the bottom right of the interface.

Figure 65 - Handling Bibliographic Record Options When Deleting Portfolios

## Technical Instructions

The following roles are needed for this function:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended

### To select a bibliographic handling option when deleting portfolios with the Load Portfolios feature:

- 1 Locate the electronic collection that contains the portfolios you plan to delete.
- 2 Click **Edit Service**.
- 3 Select the **Portfolios** tab.
- 4 Click **Load Portfolios**.
- 5 In the Select Loading Policy section, choose **Complete** or **Incremental** and then select the option to delete portfolios.

The **Handling bibliographic records without inventory** option dynamically appears.

- 6 Select your preferred bibliographic handling method and complete the remainder of the portfolio loader options as you normally would.

## Other Resource Management Enhancements

- On the Electronic Resource Activation Task List page (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**), you can click the icon next to the user in the **Modified By** column to view a pop-up window with information on the user who modified the title.
- If a bibliographic record was unlinked from the Community Zone (**Copy to institution**), it will not be copied again to the institution in subsequent activations. To prevent duplicates, Alma attempts to identify the original system ID and if it matches an Institution Zone bibliographic record, the IZ bib record will be used.
- The following options are now available for handling items with requests when you run the **Withdraw items** job (**Administration > Manage Jobs > Run a Job**):
  - Do not withdraw items with active requests
  - Do not withdraw items with requests that have not begun yet
  - Do not withdraw items with work orders

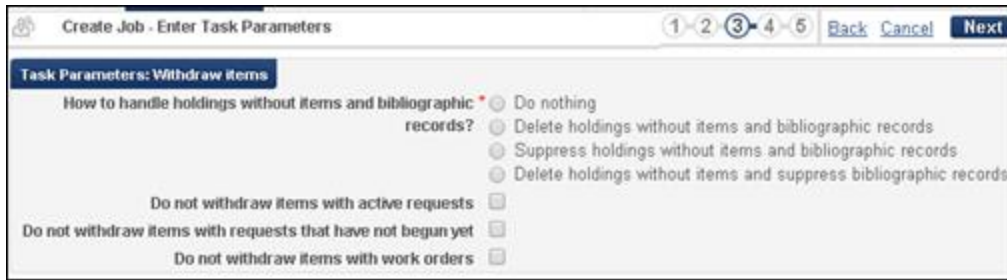


Figure 66 - Request Handling Options for the Withdraw Requests Job

- The **Top Level Collections** link was moved to the **Resource Management > Search and Sets** menu. The Collection Inventory Operator and Collection Inventory Operator Extended roles may view this link.
- Two new operators, **Is Empty** and **Is Not Empty**, were added to the **Operator** list on the Description Template Setup page (**Resource Management > Resource Configuration > Configuration Menu > Description Templates > Add Rule**).
- A new material type, **Oversize Score**, was added to the list of physical material types.
- The ability to delete local authorities was added this month as part of the larger local authority-related developments in Alma. A full explanation of this functionality will be provided when the entire local authority enhancement is complete.
- The **Match Profiles** link under **Resource Management > Resource Configuration > Configuration Menu** was removed, as it provided no functionality.
- Publishing profiles are now available for configuration during implementation (under **Resource Management > Resource Configuration > Configuration Menu > Export Profiles > Publishing Profiles**).
- The quarterly re-indexing process has completed. The following enhancements are now fully functional:
  - MARC fields 562 and 563 are indexed under the Notes search index. Existing MARC records are now searchable using these fields.
  - The export utility for extracting electronic portfolio URLs in order to synchronize with a proxy server is now functioning as described in the February release notes.
  - The MARC holdings profile subfield *a* of field 561 is now functioning as described in the March release notes.
  - When sorting repository search results for physical items by call number, the sequential order of the items' display is now correct.

# Fulfillment

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

## Redirection URL for the Online Payment System

### Description

Alma now allows customers to specify a redirection URL for online payments made with the WPM Education Online Payment System. This URL allows the online payment system to redirect patrons to a specific Web page after the online transaction completes.

### Technical Instructions

The following role can configure the necessary integration profile:

- General System Administrator

#### To specify the redirection URL for online payments:

- 1 On the General Configuration page (**General > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**. The Integration Profile List page opens.
- 2 Select **Actions > Edit** in the row that contains the WPM Education Online Payment integration profile. The General Information tab opens for the WPM Education integration profile.
- 3 Click the **Actions** tab. The Actions tab opens for the WPM Education integration profile.

**External System**

**External System**

Code WPM    Name WPM Education    Integration Type Online Payment

General Information    **Actions**    Contact Info

**Actions**

Fines and Fees Payment Type

Fines and Fees Payment Type WPM Education

WPM Education Definitions

System URL \*

**Redirect URL**

Client Id \*

Pathway Id \*

Department Id \*

Shared Secret \*

Email From \*

Email Footer

Vat Code \*

Vat Description \*

Payments custom field 1	<input type="text"/>	Payment custom field 1	<input type="text"/>
Payments custom field 2	<input type="text"/>	Payment custom field 2	<input type="text"/>
Payments custom field 3	<input type="text"/>	Payment custom field 3	<input type="text"/>
Payments custom field 4	<input type="text"/>	Payment custom field 4	<input type="text"/>
Payments custom field 5	<input type="text"/>	Payment custom field 5	<input type="text"/>
Payments custom field 6	<input type="text"/>	Payment custom field 6	<input type="text"/>
Payments custom field 7	<input type="text"/>	Payment custom field 7	<input type="text"/>
Payments custom field 8	<input type="text"/>	Payment custom field 8	<input type="text"/>
Payments custom field 9	<input type="text"/>	Payment custom field 9	<input type="text"/>
Payments custom field 10	<input type="text"/>	Payment custom field 10	<input type="text"/>

Cancel    **Save**

Figure 67 – WPM Education Integration Profile – Actions Tab

- 4 Enter the URL in the **Redirect URL** field.
- 5 Click **Save**.

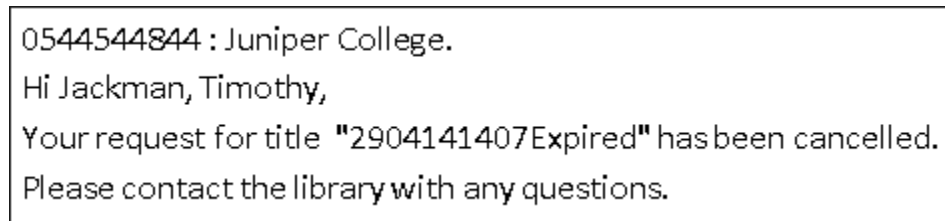
# SMS Support for Patron Notifications

## Description

For the following letters, Alma now provides SMS delivery to the patron's preferred SMS phone number:

- Change Due Date
- Request Cancellation
- Lost Loan
- Lost Loan Notification
- Borrowing Activity

The following figure shows an example of an SMS message for a Cancellation Request letter:



0544544844 : Juniper College.  
Hi Jackman, Timothy,  
Your request for title "2904141407Expired" has been cancelled.  
Please contact the library with any questions.

Figure 68 – SMS Message for Cancellation Request

## Technical Instructions

The following roles can configure Alma letters:

- General System Administrator
- Letter Administrator

### To enable the SMS channel for a letter:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Letter Activity** under **General Configuration**.

The LetterActivity mapping table page opens.

Mapping Table Cancel Save

You are configuring: Main Campus [Organization Unit List](#)

**Table Information**

Sub System INFRA Table Name LetterActivity  
 Updated By - Last Updated -  
 Table Description Letter Activity

**Mapping Table Rows** Tools

#	Enabled	letter type	channel	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	OrderListLetter	EDI	exl_impl	27/03/2014	Restore
48	<input checked="" type="checkbox"/>	TrialLetter	EMAIL	-	-	Customize
49	<input checked="" type="checkbox"/>	UserDeletionLetter	EMAIL	-	-	Customize
50	<input checked="" type="checkbox"/>	UserRegistrationLetter	EMAIL	-	-	Customize
51	<input type="checkbox"/>	FulCancelRequestLetter	SMS	-	-	Customize
52	<input type="checkbox"/>	FulltemChangeDueDateLetter	SMS	-	-	Customize
53	<input type="checkbox"/>	FulLostLoanLetter	SMS	-	-	Customize
54	<input type="checkbox"/>	FulLostLoanNotificationLetter	SMS	-	-	Customize
55	<input checked="" type="checkbox"/>	FulPlaceOnHoldShelfLetter	SMS	-	-	Customize
56	<input type="checkbox"/>	FulUserBorrowingActivityLetter	SMS	-	-	Customize
57	<input checked="" type="checkbox"/>	FulUserLoansCourtesyLetter	SMS	-	-	Customize
58	<input checked="" type="checkbox"/>	FulUserOverdueNoticeLetter	SMS	-	-	Customize
59	<input checked="" type="checkbox"/>	ExportUserLetter	SUBMISSI	-	-	Customize
60	<input checked="" type="checkbox"/>	InvoicePaymentLetter	SUBMISSI	-	-	Customize

Tools Cancel Save

Figure 69 – LetterActivity Mapping Table

- 2 Click the **Customize** button to allow the settings for the letter to be modified.
- 3 Click the gray check mark (which indicates disabled) to the left of the letter’s name to enable the letter. Make sure that you enable the letter with the SMS channel.

---

**Note:** Enabled letters are indicated by a yellow check mark.

---

- 4 Click **Save**.

## Linked Courses Added to More Info Pop-Up

With the June release, the Courses link has been added to the More Info pop-up to display the list of courses that are linked to the title. The Courses link indicates the number of courses that are linked to the title. In the following example, the title is linked to one course.

1 [Wakefield's Course](#)  
**Book** By de la Roche, Mazo. (Toronto : Dundurn 2010.)  
 ISBN: 9781459707283  
**Subject:** Electronic books. -- Fiction. -- Literature.  
**Language:** English **Medium Type:** [electronic resource]. **Record number:** (AU-P  
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [More info](#)

2

**Title** Wakefield's Course

**Related Records** No Related Records

**Orders** No Orders

**Requests/Work orders** No Requests/Work orders

**Publishing information for IE\_MMS inventory** -

**Licenses** No Licenses

**Courses** 1

3

4 **Book** By Karantai-zadeh, Kourosh. (Dordrecht. : Springer 2013.)  
 ISBN: 9781461450528

Figure 70 – Courses Link in More Info Pop-Up

## XML Output for Pick from Shelf List

### Description

In addition to the Excel format, Alma now allows you to output the Pick Up Request Report in XML format. For example:

```
- <requests xmlns="http://com/exlibris/urm/fulfillment/xmlbeans">
- <Request>
  <author />
  <title>Southern horrors : Northern visions of the Mediterranean world /</title>
  <publisher>Newcastle upon Tyne, UK : Cambridge Scholars Publishing, 2013.</publisher>
  <library>Neill</library>
  <location>New Book Location - Level One</location>
  <call_number>D210 .S68 2013</call_number>
  <volume_part_number />
  <issue />
  <description />
  <barcode>39031031932916</barcode>
  <note />
  <assigned_unit_name>Neill - Default Circulation Desk</assigned_unit_name>
  <requester_email />
  <pickup_at>Neill</pickup_at>
</Request>
- <Request>
```

Figure 71 – Sample XML Output for Pick Up Request Report

## Technical Instructions

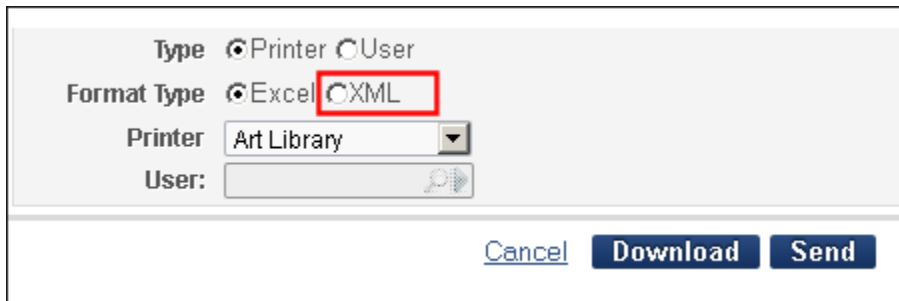
The following role can activate the Pick from Shelf report:

- Requests Operator

### To email/view the Pick from Shelf report in the XML format:

- 1 On the Pick Up Requested Resources page (**Fulfillment > Resource Requests > Pick From Shelf**), click **Request Report**.

The Request Report dialog box opens.



The screenshot shows a dialog box for generating a report. It has the following fields and controls:

- Type:** Radio buttons for  Printer and  User.
- Format Type:** Radio buttons for  Excel and  XML. The XML option is highlighted with a red box.
- Printer:** A dropdown menu currently showing "Art Library".
- User:** An empty text input field with a search icon.
- Buttons:** "Cancel", "Download", and "Send" buttons at the bottom right.

Figure 72 – XML Output for Pick Up Request Report

- 2 Specify the **XML** option in the new **Format Type** field.
- 3 Click **Send** or **Download**.

## Hold Period Updated to Account for Closed Days

The hold period calculation has been changed to account for closed days. For example, if the hold period for an item is defined as 7 days and the library is closed for a holiday on any of the next seven days, an additional day will be added to the item's hold period.

## Other Fulfillment Enhancements

- On the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests and Item Processes**), the Queue label has been replaced by **Place in Queue**. The Place in Queue indication displays the place of the request in the queue. The queue is calculated as follows:
  - If the request is active (the item is being picked up from the shelf or is on the hold shelf), its place in the queue is 0.
  - If the request is not active—that is, it is waiting in a queue—the Place in Queue indication is based on the precedence of the waiting (inactive) request, which is based

on priority. (Note that if requests are of the same priority, those that are placed first take precedence.) For example, if Place in Queue = 3, this request is third in line to be processed by the system.

---

**Note:** If there are a number of items that may fulfill the request, the Place in Queue indication is based on the item that is the least readily available. (In other words, it is a "worst case" indication.)

---

# Administration

The following sections describe the functions provided for the Administration component in the June 2014 release of Alma.

## Changes to Monitoring Jobs Page

- The following changes have been implemented on the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**) for the **Running** and **Completed** tabs:
  - The **In** drop-down list that is used with the **Find** search box no longer has the **All** option. Now **Name** is the default option. Therefore, searches can no longer be performed in both the **Name** and **Description** columns simultaneously.
  - Searches are now conducted even for part of a word and not only whole words. Therefore, a search for **pay** displays jobs with either **payment** or **paying**.
  - Searches for multiple words are displayed only if the words appear in the correct order. Therefore, a search for **new books** does not display results containing the words **books new**.

The following changes are relevant only for the **Completed** tab:

- Searches using the **Find** box can be done only on jobs within a 30-day range.
- Completed jobs are displayed for a maximum of one year.
- The following changes have been implemented on the Monitor Jobs from Last 30 Days page (**Acquisitions > Acquisitions Infrastructure > Vendors > Actions > View History** for an EDI vendor).
  - The **In** drop-down list that is used with the **Find** search box no longer has the **All** option. Now **Name** is the default option. Therefore, searches can no longer be performed in both the **Name** and **Description** columns simultaneously.
  - The results on the page are limited to the last 30 days.
- The following change has been implemented on the Monitor and View Imports page (**Acquisitions > Import > Monitor and View Imports**):
  - The results on the page are limited to the last 30 days.

# Configuring Email Notifications for Jobs

## Description

It is now possible to configure email notifications that a job has run. Until now, only the initiator of a manually run job would receive an email notification that the job ran. Now it is possible to configure email notifications to be sent to anyone.

## Technical Instructions

The following role can configure email notifications for jobs:

- General System Administrator

### To configure email notifications for jobs:

- 1 On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), select **Actions > Email Notifications** on the Scheduled tab for the job whose email notification you want to configure. The Email Notifications for Scheduled Jobs page opens.

The screenshot displays the 'Email Notifications for Scheduled Jobs' configuration page. At the top, the Alma QA logo and navigation tabs for 'Tasks' and 'Analytics' are visible. The current page title is 'Email Notifications for Scheduled Jobs'. Below the title, the job name 'PO Line - Packaging' is shown. There are two main sections for adding subscribers: 'Subscribers by User' and 'Subscribers by Email address'. Each section has an 'Add User' or 'Add Email Address' button and a message stating 'No records were found.' The page includes 'Cancel' and 'Save' buttons at the top right and bottom right.

Figure 73 –Email Notifications for Scheduled Jobs

- 2 Click **Add User** to configure email notifications to be sent to Alma users. The following is displayed.

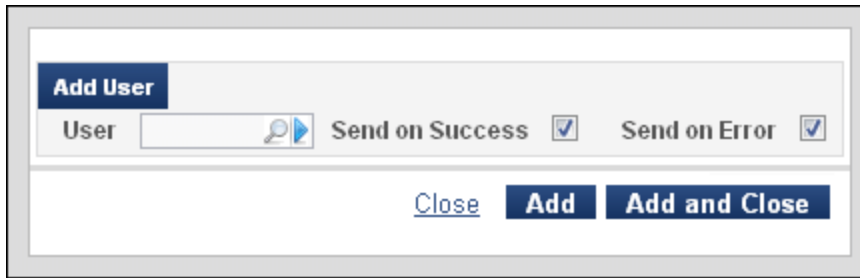



Figure 74 – Add User

- 3 In the **User** text box, enter the name of an Alma user or click the **Find** icon  and select the Alma user to whom you want email notifications sent.
- 4 Select the **Send on success** check box to have an email notification sent when the job completes successfully and select the **Send on error** check box to have an email notification sent when the job does not complete successfully.

---

**Note:** A successful completion of the job does not mean that the job did not produce errors. Rather, it means that the job completed with the status of Completed Successfully (as shown in **Monitor Processes > Completed tab**).

---

- 5 Click **Add** if you want to configure another user to receive an email notification for the job; otherwise, click **Add and Close**.
- 6 Click **Add Email Address** to configure email notifications to be sent to an email address as well and follow the steps described above.
- 7 After you have completed configuring the email notification recipients, click **Save**.

When a job completes, all subscribers receive an email notification for the job.

## User Management Regular Expression Message Now Configurable

### Description

The valid format of several fields available in Alma is determined by the regular expression as configured in Alma. When entering data into these fields, a message is displayed describing the valid format. Until now, although the regular expression was configurable, the message was not. Now the message can be configured to match the regular expression. This development affects the following fields:

- Password
- Email

- Telephone
- Postal Code

## Technical Instructions

The following roles can configure the regular expression messages:

- User Administrator
- General System Administrator

### To configure the regular expression messages:

- 1 On the CustomerParameters Mapping Table page (**Administration > User Management Configuration > Configuration Menu > General > Other Settings**) click **Customize** for one of the regular expression display fields, for example, **email\_regex\_display**.

	Enabled	parameter key	parameter module	parameter value	free text description		Updated
1	✔	address_line1_regex	user_management			Customize	-
2	✔	address_line2_regex	user_management			Customize	-
3	✔	address_line3_regex	user_management			Customize	-
4	✔	address_line4_regex	user_management			Customize	-
5	✔	address_line5_regex	user_management			Customize	-
6	✔	days_password_change	user_management	90	Number of days from la	Customize	-
7	✔	email_regex	user_management		must have a valid form	Restore	07/05/2014
8	✔	email_regex_display	user_management	The email address must be in a valid fo		Restore	07/05/2014

Figure 75 – email\_regex\_display in CustomerParameters Mapping Table

- 2 Enter the text that you want displayed when data is entered. For example, enter The email address must be in a valid format.
- 3 Click **Save**.

The text you entered now appears when entering an email address:

The image shows a software dialog box titled "Add Email Address". It contains several input fields and controls:

- Add as an external:** A checkbox that is currently unchecked.
- Email types:** A group box containing three checkboxes: "Personal", "School", and "Work", all of which are unchecked.
- Email address:** A text input field containing a single character, possibly a pipe symbol. A tooltip message "The email address must be in a valid format" is displayed over this field.
- Description:** A larger text area, currently empty.
- Preferred address:** A radio button group with "Yes" selected and "No" unselected.

At the bottom of the dialog, there are three buttons: "Close", "Add", and "Add and Close".

Figure 76 – Regular Expression Message

# Resource Sharing

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

## Send Query to Patron Using Template

### Description

This feature enables configuring queries to be sent to patrons using a template.

### Technical Instructions

The following roles can send configure patron query templates:

- Fulfillment Administrator
- General System Administrator

The following roles can send queries to patrons:

- Fulfillment Services Operator
- Fulfillment Services Manager

### To configure patron query templates:

- 1 Open the PatronQueryTemplates Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Patron Query Templates**).

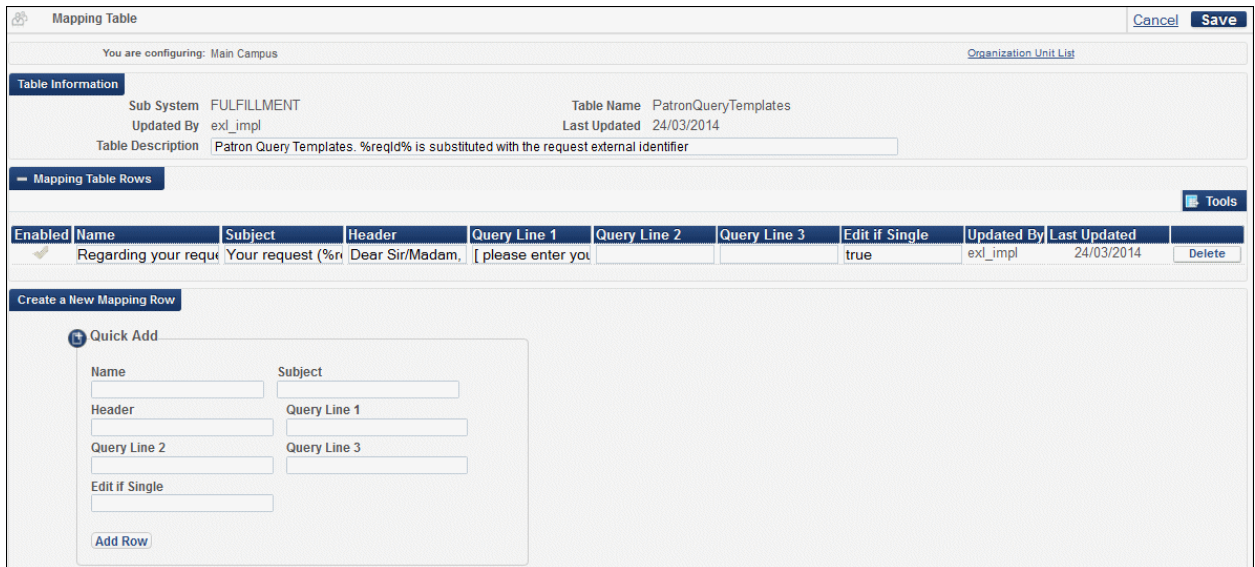


Figure 77 – PatronQueryTemplates Mapping Table Page

2 In the **Mapping Table Rows** section, modify the columns, as needed.

- **Name** — A descriptive name for the template
- **Subject** — The subject line of the query. The string (**%reqId**) is replaced with the request ID of the request.
- **Header** — The first line of the body of the query; typically a greeting.
- **Query Line 1** — The first line of the query
- **Query Line 2** — The second line of the query
- **Query Line 3** — The third line of the query
- **Edit if Single** — Relevant when only a single template displays in the table. Assign as **True** to open the E-Mail Message dialog box when clicking **Send Query to Patron** and enable editing the query contents before sending. Assign as **False** to send the query immediately upon clicking **Send Query to Patron**.

3 In the **Create a New Mapping Row** section, enter information in the displayed fields and click **Add Row** to add a new template. The displayed fields are identical to the columns described in the previous step.

4 Click **Save** to save the templates.

#### To send queries to patrons using patron query templates:

- 1 On the Resource Sharing Borrowing Requests Page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Send Query to Patron** for a non-completed request.
- 2 If multiple templates were configured, a dialog box appears, prompting you to select the template you want to use:

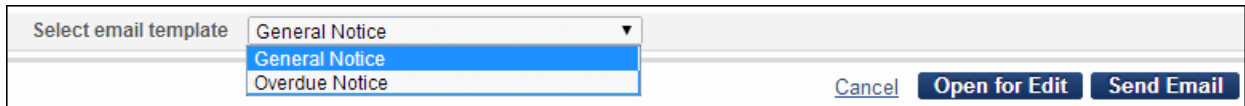


Figure 78 – Select Email Template Dialog Box

Click **Open for Edit** to edit the contents of the message before sending it, or click **Send Email** to send the query immediately, without editing its content.

- 3 If only one template was configured on the PatronQueryTemplate Mapping Table Page and **Edit if Single = False**, the query is sent to the patron. If **Edit if Single = True**, the **E-mail Message** dialog box opens, where you can edit the contents of the configured template.

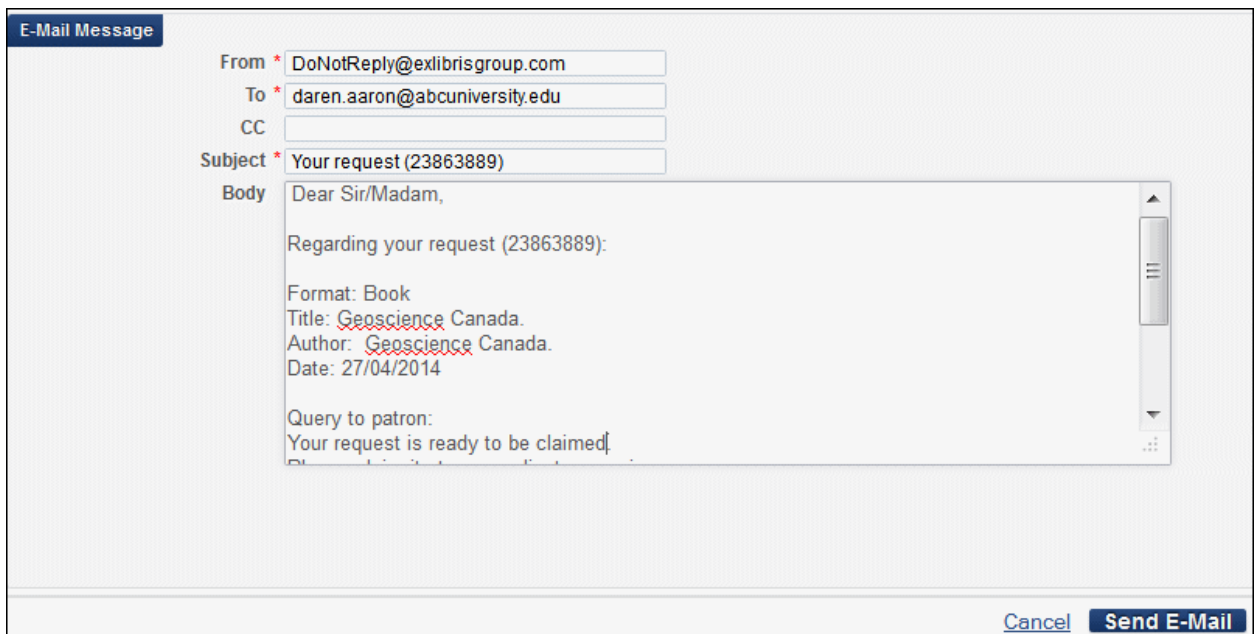


Figure 79 – Email Message Dialog Box

- 4 Modify the contents of the email message as needed, and click **Send E-Mail**. The email is sent to the patron.

## Automatically Receiving a Resource Sharing Item

### Description

An NCIP resource sharing partner can now receive a resource sharing item automatically. Automatic receiving enables staff to register a Receive action in the broker system, without having to repeat the Receive action in Alma. The AcceptItem NCIP message that the broker system sends causes Alma to automatically place a temporary barcode on the Alma item. The item is then put in transit to the required pickup location or to the hold shelf, depending on where the pickup location is.

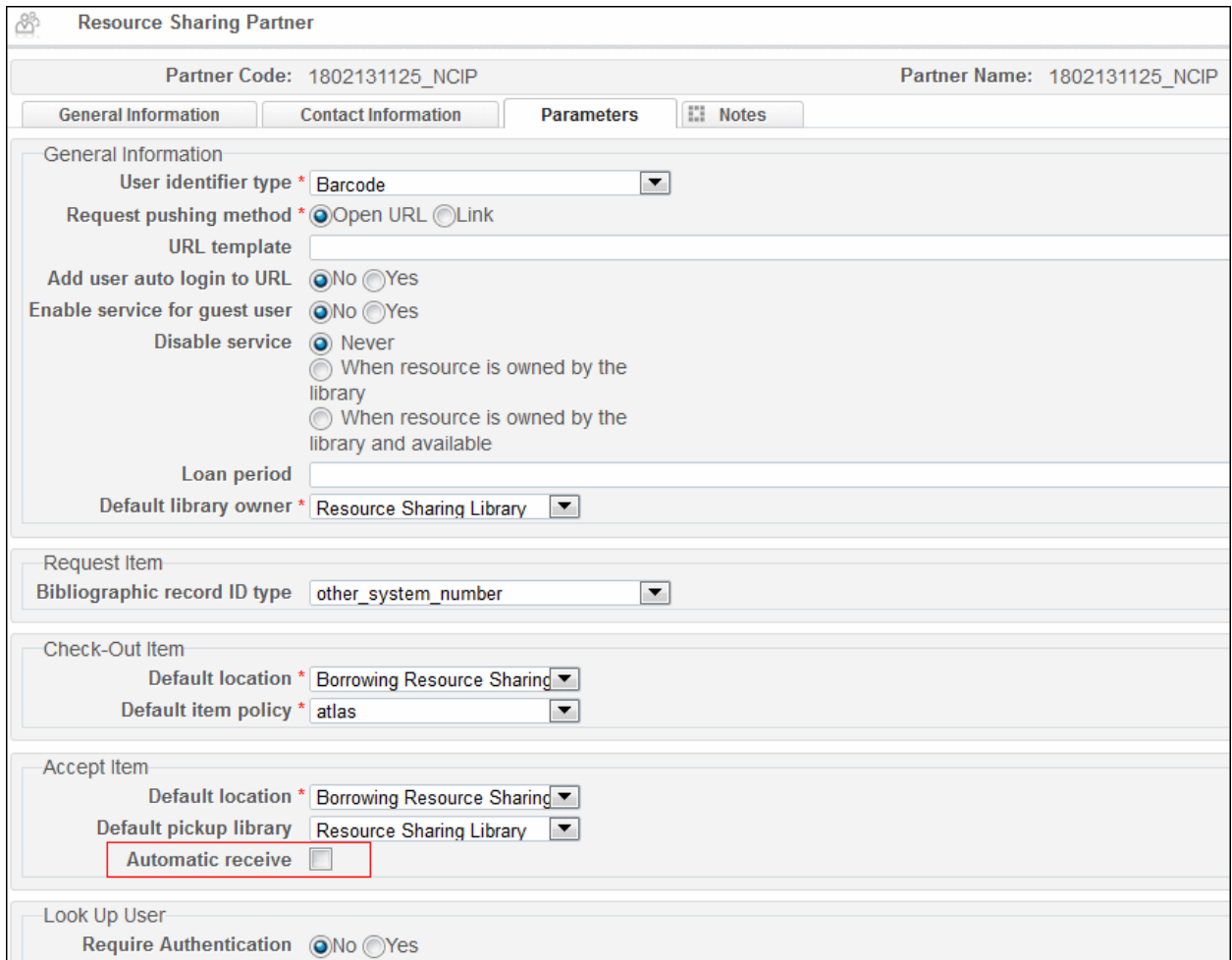
## Technical Instructions

The following role can configure automatic receiving of a resource sharing item:

- Resource Sharing Partners Manager

### To configure automatic receiving of a resource sharing item:

- 1 On the Resource Sharing Partner List page (**Fulfillment > Resource Sharing > Partners**), select **Actions > Edit** for an NCIP partner. The Resource Sharing Partner page opens.
- 2 Click the **Parameters** tab and in the **Accept Item** section, locate the **Automatic receive** field.



The screenshot shows the 'Resource Sharing Partner' configuration page, specifically the 'Parameters' tab. The page is titled 'Resource Sharing Partner' and displays the following information:

- Partner Code: 1802131125\_NCIP
- Partner Name: 1802131125\_NCIP

The 'Parameters' tab is active, and the 'Accept Item' section is expanded. The 'Automatic receive' checkbox is highlighted with a red box. The 'Default library owner' is set to 'Resource Sharing Library'.

General Information:

- User identifier type: Barcode
- Request pushing method: Open URL (selected), Link
- URL template: [Empty]
- Add user auto login to URL: No (selected), Yes
- Enable service for guest user: No (selected), Yes
- Disable service: Never (selected), When resource is owned by the library, When resource is owned by the library and available
- Loan period: [Empty]
- Default library owner: Resource Sharing Library

Request Item:

- Bibliographic record ID type: other\_system\_number

Check-Out Item:

- Default location: Borrowing Resource Sharing
- Default item policy: atlas

Accept Item:

- Default location: Borrowing Resource Sharing
- Default pickup library: Resource Sharing Library
- Automatic receive:

Look Up User:

- Require Authentication: No (selected), Yes

Figure 80 – Resource Sharing Partner Page – Parameters Tab

- 3 Select **Automatic receive**. The **Receive desk** field displays, where you select a desk at which the item is to be received. The available options are the desks of the library specified in the **Default library owner** field. The value you select indicates the location where the item arrives when the AcceptItem message is received.

Accept Item

Default location \* Borrowing Resource Sharing

Default pickup library Resource Sharing Library

Automatic receive

Receive Desk \* Resource Sharing Desk

Look Up User

Require Authentication  No  Yes

Figure 81 – Receive Desk Field

- 4 Click **Save** to save the partner configurations.

## Request Renewal for a Received Item

### Description

This feature enables resource sharing borrowers to request and activate renewal of a resource sharing borrowing request from the lending institution. Renewal requests can be performed for items that have been received but not returned.

You can configure renewal actions in the workflow profiles. These indicate the renewal actions that can be performed on borrowing request task lists by the resource sharing partner associated with the profile.

### Technical Instructions

The following roles can configure renewal actions for workflow profiles:

- General System Administrator
- Fulfillment Administrator

The following roles can request and activate renewal of a resource sharing borrowing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

#### To configure renewal actions for workflow profiles:

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

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	Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Cancel request not accepted, Declared overdue by partner, Lender check in, 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	Cancel reply, Lender check in, Overdue item, Recalled item, Staff Renewal	Actions

Figure 82 – Workflow Profiles Page

2 Select **Actions** > **Edit** for the lending profile. The Edit Workflow Profile dialog box opens.

**Edit Workflow Profile**

Workflow Profile \* Lending Workflow

Type Lending

Steps \* Overdue item  
Recalled item  
Renewal response  
Staff Renewal

[Cancel](#) [Save](#)

Figure 83 – Edit Workflow Profile Dialog Box

3 In the **Steps** field, select from the following:

- **Renewal response** — Indicates that the borrower requesting renewal is waiting for a response from the lender before renewal can be carried out. When this step is selected, the status of a request for which renewal was requested becomes **Renew Requested**.
- **Staff renewal** — Indicates that renewal can be invoked by a staff member. When this step is selected, the **Renew** link displays on the Resource Sharing Borrowing Requests page (see the following procedure).

4 Click **Save**.

**To request renewal of resource sharing borrowing requests:**

1 On the Resource Sharing Borrowing Requests page (**Fulfillment** > **Resource Sharing** > **Borrowing Requests**), locate a request with a Received status.

5  [10 hours](#)  
Book

External Identifier: EXL0001301  
Partner: partner1 name  
Requester: User\_Super

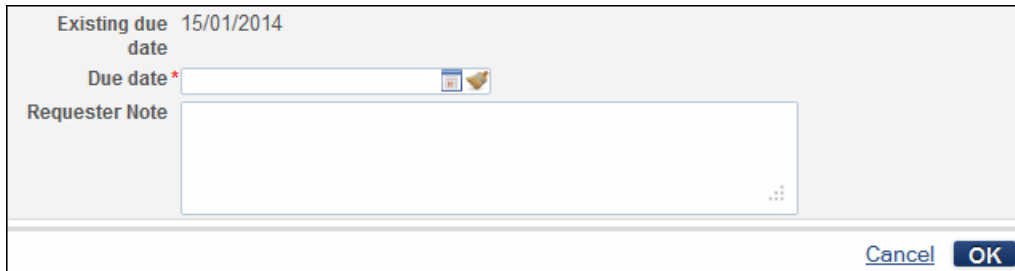
Request Status: Physically received by library

Barcode: [3521657462](#)  
Pickup At: INT  
Creation Date: 31/12/2012

[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | Request renew | [Return](#)

Figure 84 – Resource Sharing Borrowing Requests Page – Request with Received Status

2 Click **Request renew**. The Due Date dialog box opens.

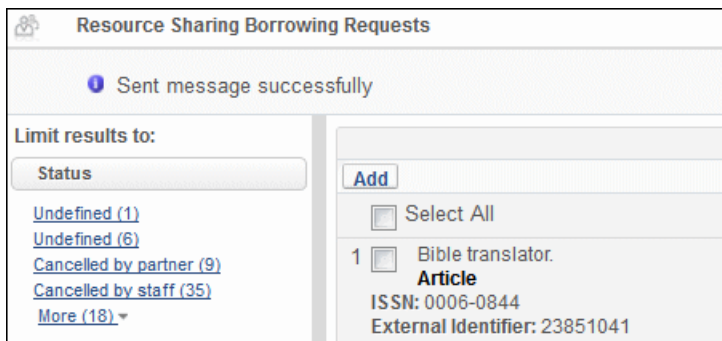


The dialog box contains the following fields and controls:

- Existing due date: 15/01/2014
- Due date\*: A date input field with a calendar icon and a dropdown arrow.
- Requester Note: A large text area for entering notes.
- Buttons: Cancel and OK.

Figure 85 – Due Date Dialog Box

- a In the **Due date** field, enter a due date for the request.
- b In the **Requester note** field, enter a note, as needed. The note displays in the **Notes** tab page, when clicking **Edit** for the request.
- c Click **OK**. A message indicating the sending status displays at the top of the page.

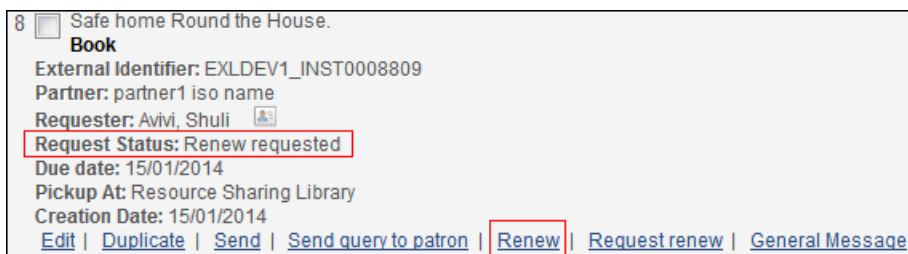


The page displays a success message and a list of borrowing requests:

- Message: Sent message successfully
- Limit results to: Status (dropdown menu)
- Request list:
  - 1  Bible translator. **Article**
  - ISSN: 0006-0844
  - External Identifier: 23851041

Figure 86 – Sent Message Status

3 If the Resource Sharing Lending Workflow Profile has the **Renewal Response** option selected, the request displays with a status of **Renew Requested**.



The page displays a request with the following details:

- Safe home Round the House.
- Book**
- External Identifier: EXLDEV1\_INST0008809
- Partner: partner1 iso name
- Requester: Avivi, Shuli
- Request Status: Renew requested**
- Due date: 15/01/2014
- Pickup At: Resource Sharing Library
- Creation Date: 15/01/2014
- Actions: [Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Renew](#) | [Request renew](#) | [General Message](#)

Figure 87 – Resource Sharing Borrowing Requests Page – Renew Requested Status and Renew Link

---

**Note:** If **Renewal Response** was not selected for the workflow profile, the request is automatically renewed after clicking the **Request renew** link; the request's status displays as **Renewed by partner**, and the **Renew** link does not appear. For details on configuring renewal actions in workflow profiles, see the previous procedure.

---

## To carry out renewal of resource sharing borrowing requests:

- 1 On the Resource Sharing Borrowing Requests page, click **Renew** for a request to open the Due Date dialog box.

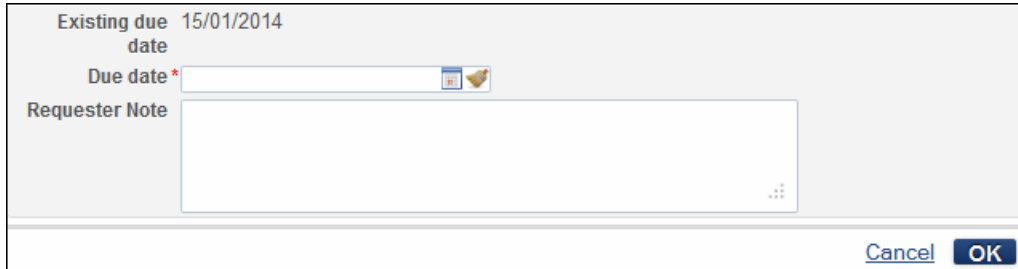


Figure 88 – Due Date Dialog Box

- 2 In the **Due date** field, enter a due date for the request.
- 3 In the **Requester note** field, enter a note, as needed. The note displays in the **Notes** tab page, when clicking **Edit** for the request.
- 4 Click **OK**.

The request displays on the Resource Sharing Borrowing Requests page with the status **Renewed by Partner**.



Figure 89 – Resource Sharing Borrowing Request – Renewed by Partner

## Sending a General Message with a Resource Sharing Request

### Description

This feature enables sending a general message with a resource sharing borrowing or lending request. The message displays on the request's General Messages tab when clicking **Edit** or **View** for the request.

General Messages can be used only if:

- The request is an ISO request

- The request has already been sent (this limitation is for borrowing requests only)

Additionally, there is a **General Messages** facet, which enables you to filter requests by those containing active general messages.

## Technical Instructions

The following roles can send general messages with a resource sharing request:

- Fulfillment Services Operator
- Fulfillment Services Manager

### To send a general message with a resource sharing request:

- 1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), locate an ISO request. The request displays the **General Message** link.

The screenshot shows the 'Resource Sharing Borrowing Requests' interface. On the left, there are filters for 'Status', 'Active Partner', 'Creation Date', 'Update Date', and 'Requested Format'. The main area displays a list of requests. The third request, 'Geoscience Canada', has its 'General Message' link highlighted with a red box.

Item	Title	Partner	Request Status	Needs patron information	Creation Date	Actions
1	Bible translator. <b>Article</b>	Boston College SHR	Cancelled by partner	03/02/2014	14/04/2013	View   Remove   Duplicate   Receive   General Message
2	Crocodile safari <b>Book</b> By By Arnosky, Jim. By Arnosky, Jim (2009)	Aleph	Request Completed	09/03/2014	15/01/2014	View   Remove   Duplicate   General Message
3	Geoscience Canada. <b>Book</b> By Geoscience Canada.	Boston College SHR	Renew requested		06/05/2013	Edit   Duplicate   Send   Send query to patron   Receive   <b>General Message</b>

Figure 90 – Resource Sharing Borrowing Requests Page – General Message Link

- 2 Click **General Message**. The General Message dialog box opens.



Figure 91 – General Message Dialog Box

- 3 In the **Message** field, enter a message and click **Send**. The message is sent to the lender.
- 4 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), locate the message with the external identifier belonging to the Borrowing request message, and click **Edit**. The Resource Sharing Lending Request page opens.
- 5 Click the **General Messages** tab. The General Messages page opens, and the general message sent by the borrower displays in the table with **Type = Received**.
- 6 Once the message has been noted or acted upon, click **Dismiss** to remove the message from the page.

---

**Note:** You can also use this feature to send a general message from a lending institution to a borrowing institution. You can view requests that have received messages (messages of **Type = Received**) that are active by clicking the **Active General Messages** link in the **General Messages** facet on the left side of the page.

---

You can also access active general messages by clicking the **Lending requests with active general messages** link on the Tasks list.

## New Shipping Interface and Option to Set Shipping Costs and Due Date at Ship Time

### Description

This feature enables updating the due date and shipping cost simultaneously for multiple items being shipped together. An ISO message is sent to the borrower indicating that the items have been shipped and their information has been updated.

### Technical Instructions

The following roles can update the due date and shipping cost for multiple items in a shipping request:

- Fulfillment Services Operator

- Fulfillment Services Manager

**To set a due date and shipping cost for shipping multiple items from a lending institution:**

- 1 Open the Shipping Items page (**Fulfillment > Resource Sharing > Shipping Items**), to configure shipping of items.

The screenshot shows the 'Shipping Items' page with a 'Shipped items' tab. The configuration fields are as follows:

- Shipping Format:** Radio buttons for Digital, Physical (selected), and Physical non-returnable.
- Shipping Cost:** A text input field with 'USD' as a currency selector.
- Due Date:** A date picker field.
- Scan Item Barcode \*:** A text input field with a magnifying glass icon and an 'OK' button.
- Scan Request ID:** A text input field with an 'OK' button.

At the bottom of the page, it says 'No records were found.'

Figure 92 – Shipping Items Page

- 2 In the **Shipping format** field, select the format in which the request is to be shipped.
- 3 In the **Shipping cost** field, enter a shipping cost for the item.
- 4 In the **Due date** field, enter a date by when the item must be shipped. This field displays only when **Shipping format = Physical**.
- 5 In the **Scan item barcode** field, enter the item’s barcode. This field displays only when **Shipping format = Physical**.
- 6 In the **Scan request ID** field, enter the item’s external identification number.
- 7 Click **OK** next to either the **Scan item barcode** or **Scan request ID** fields. The item is located and displays on the bottom of the page.

Repeat the above steps for all items you want to ship. The items display in the table at the bottom of the page, and the configured shipping cost and due date are applied to each of the items.

## Other Resource Sharing Enhancements

- The **Alternative delivery address** field always appeared in the resource sharing request forms. Now, you can set the **rs\_support\_ADD\_service** parameter (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) to determine whether or not this field displays.
  - **rs\_support\_ADD\_service=True** – The **Alternative address** field displays (default)
  - **rs\_support\_ADD\_service=False** - The **Alternative address** field does not display

- A new parameter, **ignore\_lender\_due\_date**, was added to the Fulfillment CustomerParameters table (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**). When this parameter is set to **True**, a request's due date is ignored when loaning an item to a patron, and the due date is calculated according to the TOU defined in the fulfillment unit.

# Analytics

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

## Addition of the Interested Users Field to the Shared PO Line Dimension

### Description

The Interested Users field has been added to the shared PO line dimension in all subject areas in which it appears. This field displays the interested users for the PO line as configured in Alma.

The names of the interested users are displayed in the last name, first name format, are concatenated, and are separated by a semicolon.

### Technical Instructions

The Design Analytics role can access this enhancement.

#### To access the Interested Users field in Alma Analytics:

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

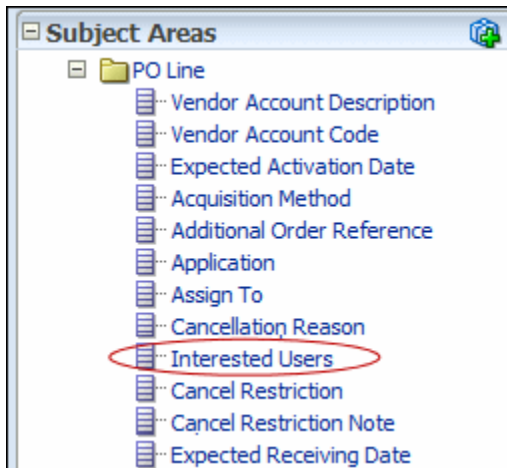


Figure 93 – PO Line Interested Users

The following is an example of a report using the Interested Users field.

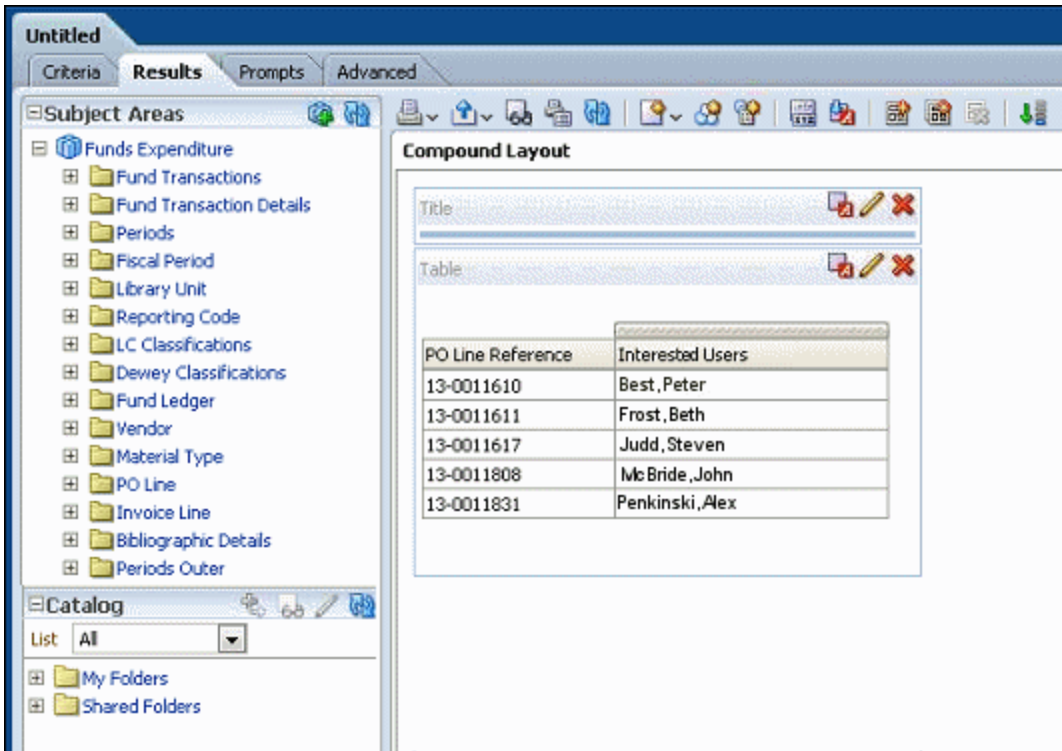


Figure 94 – Interested Users Report

Since the field is concatenated, if you want to filter the report based on a specific interested user, you must use the **contains any** operator.

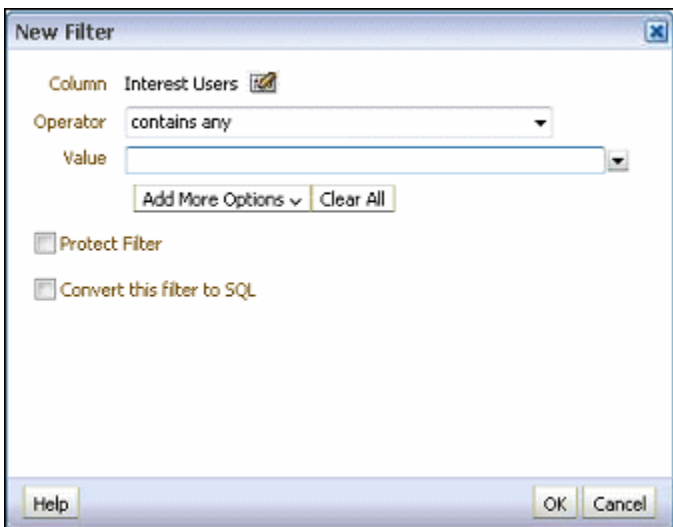


Figure 95 – Contains Any Operator

# Addition of the Renewal Date Dimension to the Fulfillment Subject Area

## Description

The Renewal Date dimension has been added to the Fulfillment subject area. The renewal date information can be used to count the number of renewals done within a certain time period.

This development has been added based on customer feedback regarding the previous solution that count renewals based on their original loan date did not provide the data needed for many of the industry reports (which require providing the number of renewals per period, where the date is the renewal date).

## Technical Instructions

The Design Analytics role can access this enhancement.

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

In the Fulfillment subject area, the Renewal Date dimension has been added.

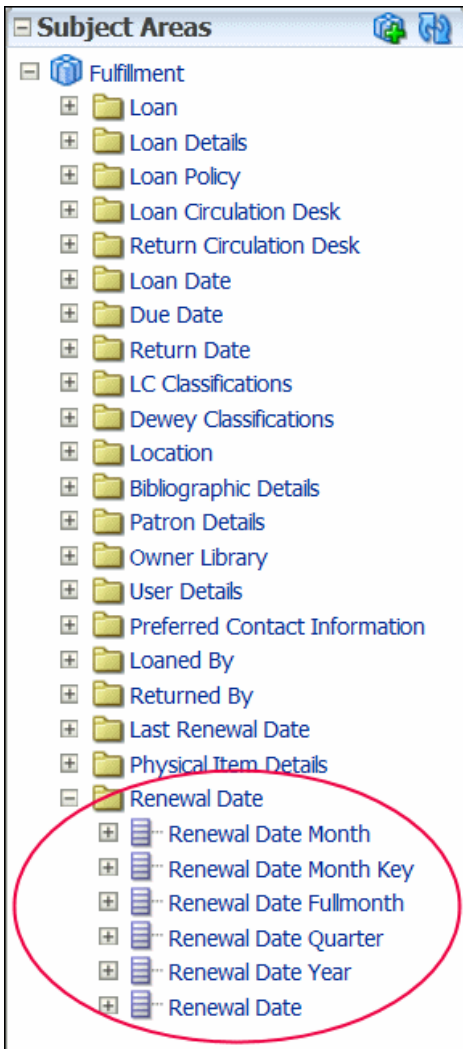


Figure 96 – Renewal Date

The following is an example of a report using the Renewal Date Month field from the Renewal Date dimension. It demonstrates how using the new renewal date filter can impact reports.

In this example, the number of loans and the number of renewals calculated when filtering by **loan year=2013** is displayed:

Table	
Loans	Renewals
352,192	67,485

Figure 97 – Loans and Renewals

This report is missing renewals performed in 2013 for loans that took place before 2013. By adding the following filter, you can see that there are many more renewals in 2013 for loans that took place before 2013.

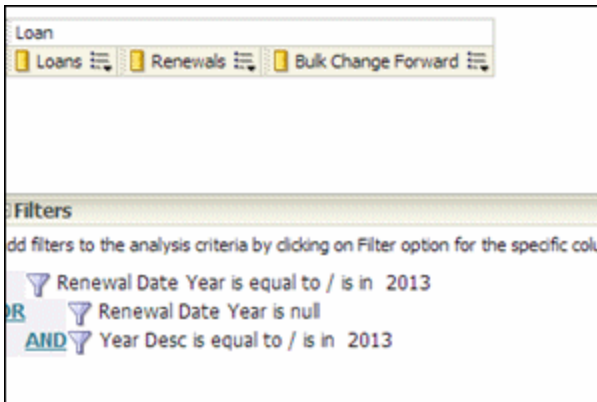


Figure 98 – Renewals Filter

The report now appears as follows:

Table	
Loans	Renewals
352,192	101,457

Figure 99 –Loans and Renewals (Revised)

## Analytics Job Enhancements

The following Analytics-related modifications were made in **Administration > Manage Jobs > Monitor Jobs**:

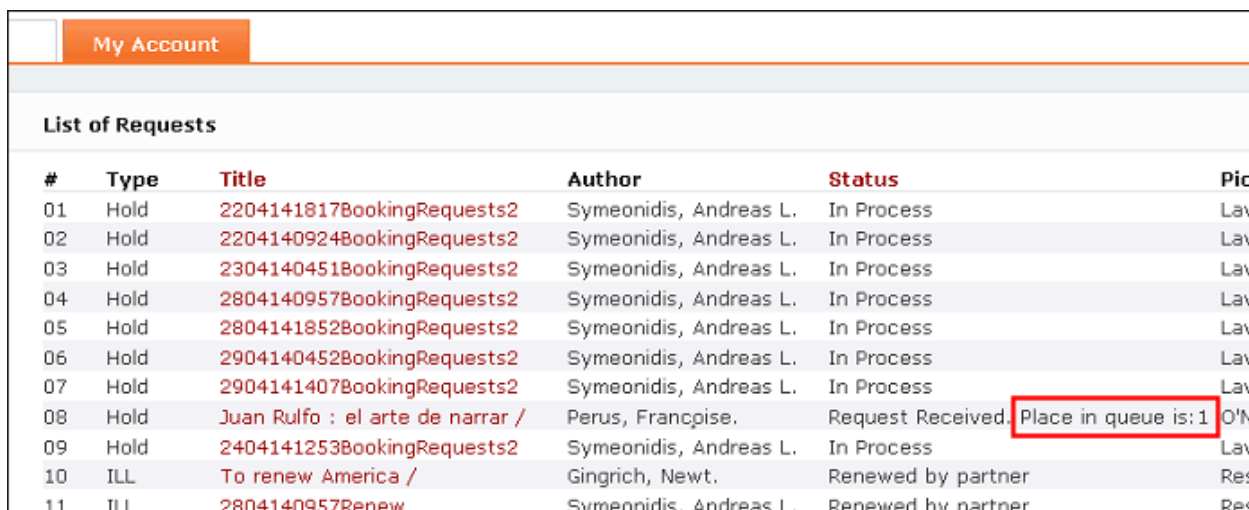
- The job category of the Analytics-related jobs was changed from SAAS operator to **Analytics**.
- The job names were changed to the following:
  - Daily schedule of Analytics reports and dashboards
  - Weekly schedule of Analytics reports and dashboards
  - Monthly schedule of Analytics reports and dashboards

# Primo

The following sections describe the functions provided for Primo in the June 2014 release of Alma.

## Primo Request List Enhancements

For non-active hold and digitization requests, Primo now displays the item's place in queue in the request list on the My Account > Requests page. For example:



#	Type	Title	Author	Status	Pic
01	Hold	2204141817BookingRequests2	Symeonidis, Andreas L.	In Process	Law
02	Hold	2204140924BookingRequests2	Symeonidis, Andreas L.	In Process	Law
03	Hold	2304140451BookingRequests2	Symeonidis, Andreas L.	In Process	Law
04	Hold	2804140957BookingRequests2	Symeonidis, Andreas L.	In Process	Law
05	Hold	2804141852BookingRequests2	Symeonidis, Andreas L.	In Process	Law
06	Hold	2904140452BookingRequests2	Symeonidis, Andreas L.	In Process	Law
07	Hold	2904141407BookingRequests2	Symeonidis, Andreas L.	In Process	Law
08	Hold	Juan Rulfo : el arte de narrar /	Perus, Francpise.	Request Received. Place in queue is: 1	O'M
09	Hold	2404141253BookingRequests2	Symeonidis, Andreas L.	In Process	Law
10	ILL	To renew America /	Gingrich, Newt.	Renewed by partner	Res
11	ILL	2804140957Renew	Symeonidis, Andreas L.	Renewed by partner	Res

Figure 100 – Request List on Primo My Account > Requests Page

## Display Public Notes in the Primo Get It Tab

### Description

With the June release, Primo displays public notes as follows in the Get It tab:

- Previously, Primo only displayed subfield 852 \$z in the holdings information on the items list page, and now it also displays under the Holdings column on the holdings list page.

Request Options: [Interlibrary Loan](#) | [Resource sharing request](#)

Year  Volume  Description

Location	Holdings	Location Map
<a href="#">Law Periodicals No Loan J</a>	v.72-78 (2000-2006)	
<a href="#">Law Microform No Loan Hein's bar journal service</a>	v.72-80 (2000-2008) v.81: no. 5(2009: June) <b>Note:</b> Library no longer subscribes to this title in microfiche. Available online.	
<a href="#">Neill Stacks (STACK) K14 .E963</a>	Supplementary Material: my supplementary material, Indexes: my indexes,	<a href="#">Locate</a>

Figure 101 – Public Notes in Holdings List in Primo Get It Tab

- Primo now displays item-level public notes (which are added with the Physical Item Editor) under the **Description** column in the items list. The note appears after the **Note:** label and can be customized.

Request Options: [Interlibrary Loan](#) | [Resource sharing request](#)

Location  Year  Volume  Description

1 - 5 of 5 Records

Barcode	Type	Policy	Description	Status	Options
912641-1580	Issue	120 Days	v.81: no. 5(2009: June)	Item in place	<a href="#">Request</a>
912641-1570	Issue	120 Days	v.81: no. 4(2009: May) <b>Note:</b> Special item	Item in place	<a href="#">Request</a>
912641-1560	Issue	120 Days	v.81: no. 3(2009: Mar./Apr.)	Item in place	<a href="#">Request</a>
912641-1550	Issue	120 Days	v.81: no. 2(2009: Feb.)	Item in place	<a href="#">Request</a>
912641-1540	Issue	120 Days	v.81: no. 1(2009: Jan.)	Item in place	<a href="#">Request</a>

Figure 102 – Public Notes in Items List in Primo Get It Tab

## Technical Instructions

No additional configuration is necessary to enable this enhancement, but you can modify the labels that display in Primo.

Either of the following roles can modify display labels:

- General System Administrator
- Fulfillment Administrator

### To modify a display label:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under **Discovery Interface Display Logic**.
- 2 Click the **Customize** button in the line containing the `c.uresolver.getit2.item_list.note` code and modify the text in the **Description** field.
- 3 Click **Customize** at the bottom of the page to store the modified labels in the system.

## Display Additional Holdings Information in the Primo Get It Tab

### Description

With the June release, you can display additional holdings information in the Primo Get It tab. The following table lists the MARC fields that hold additional information to display in Primo. To display most of this additional information, you must first enable the `display_additional_holding_fields_in_getit` Other Settings parameter.

MARC Field	Description	Requires Enabling?
867 (Textual Holdings - Supplementary Material)	This field displays in the holdings list and in the single holdings display. The information appears after the <b>Supplementary Material:</b> label, which is customizable by modifying the description for the following code: <code>c.uresolver.getit2.holding_list.supplementary_material</code>	N
868 (Textual Holdings - Indexes)	This field displays in the holdings list and in the single holdings display. The information appears after the <b>Indexes:</b> label, which is customizable by modifying the description for the following code: <code>c.uresolver.getit2.holding_list.indexes</code>	Y

MARC Field	Description	Requires Enabling?
561 (Ownership and Custodial History)	<p>This field displays in the holdings list and in the single holdings display. Primo displays only the following subfields, which are separated by a comma:</p> <ul style="list-style-type: none"> <li>▪ \$a (History)</li> <li>▪ \$u (Uniform Resource Identifier)</li> <li>▪ \$3 (Materials specified)</li> </ul> <p>This information appears after the <b>Ownership and Custodial History:</b> label, which is customizable by modifying the description for the following code: c.uresolver.getit2.holding_list.ownership</p>	Y
563 (Binding Information)	<p>This field displays in the holdings list and in the single holdings display. Primo displays only the following subfields, which are separated by a comma:</p> <ul style="list-style-type: none"> <li>▪ \$a (Binding note)</li> <li>▪ \$u (Uniform Resource Identifier)</li> <li>▪ \$3 (Materials specified)</li> </ul> <p>This information appears after the <b>Binding:</b> label, which is customizable by modifying the description for the following code: c.uresolver.getit2.holding_list.binding</p>	Y

MARC Field	Description	Requires Enabling?
541 (Immediate Source of Acquisition Note)	<p>This field displays in the holdings list and in the single holdings display. Primo displays only the following subfields, which are separated by a comma:</p> <ul style="list-style-type: none"> <li>▪ \$a (Source of acquisition)</li> <li>▪ \$b (Address)</li> <li>▪ \$c (Method of acquisition)</li> <li>▪ \$d (Date of acquisition)</li> </ul> <p>This information appears after the <b>Source of Acquisition:</b> label, which is customizable by modifying the description for the following code: <code>c.uresolver.getit2.holding_list.source_of_acq</code></p>	Y
852 \$t (Copy number)	<p>This field displays after the public note (852 \$z) and is prefixed with the <b>Copy:</b> label, which is customizable by modifying the description for the following code: <code>c.uresolver.getit2.item_list.copy</code></p>	N

The following figure shows examples of additional holdings information in the Primo Get It tab:

The screenshot shows the Primo Get It interface with the following details:

- Request Options:** Interlibrary Loan, Resource sharing request
- Filters:** Year: All, Volume: All, Description: All
- Table Columns:** Location, Holdings, Location Map
- Row 1:** Law Periodicals No Loan J, Holdings: v.72-78 (2000-2006)
- Row 2:** Law Microform No Loan Hein's bar journal service, Holdings: v.72-80 (2000-2008), v.81: no.5(2009:June), Note: Library no longer subscribes to this title in microfiche.
- Row 3:** Neill Stacks (STACK) K14 .E963, Holdings: Supplementary Material: my supplementary material, Indexes: my indexes, Location Map: Locate
- Row 4:** Neill Stacks (STACK) K14 .E963, Holdings: Ownership and Custodial History: my materials specified, my URI, my history; Binding: my materials specified, my URI, my history; Source of Acquisition: date of acquisition, address, my method of acquisition, my source of acquisition, Location Map: Locate
- Row 5:** Neill Stacks (STACK) K14 .E963, Location Map: Locate

Figure 103 – Additional Holdings Information Shown in the Primo Get It Tab

## Technical Instructions

The following role can modify the **display\_additional\_holding\_fields\_in\_getit** parameter:

- General System Administrator

Either of the following roles can modify display labels:

- General System Administrator
- Fulfillment Administrator

### To display additional holdings information in the Primo Get It tab:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Other Settings** under **General Configuration**.
- 2 Click the **Customize** button to the right of the **display\_additional\_holding\_fields\_in\_getit** customer parameter and change the **parameter value** field to **true**.
- 3 Click **Save** at the bottom of the page to store the modified parameter in the system.

### To modify a display label:

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under **Discovery Interface Display Logic**.
- 2 Click the **Customize** button to the right of the label that you want to edit and modify the text in the **Description** field.
- 3 Click **Customize** at the bottom of the page to store the modified label in the system.

# Alma APIs

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

## Alma RESTful APIs

With the June release, the following new APIs are available. Information on them is available on the new Developer Network. (Click the relevant links on the following page:

<https://developers.exlibrisgroup.com/alma/apis/bibs>):

- GET /almaws/v1/bibs/{mms\_id}/holdings/{holding\_id}– to retrieve a holdings record
- PUT /almaws/v1/bibs/{mms\_id}/holdings/{holding\_id} - to update a holdings record

## Alma Requests API

The following parameters have been added to the Alma Requests API response:

- **place\_in\_queue** – For non-active requests (request\_status = Not Started), this parameter returns the patron's position in the queue.
- **task\_name** – For active requests (request\_status = In Process), this parameter returns the current task that is being performed on the requested item (such as **Pickup From Shelf, In Transit, On Hold Shelf**, and so forth)
- **expiry\_date** – For active requests (request\_status = In Process), this parameter returns the date at which the current task is about to expire.

For example:

```
<user_request>
  <request_id>12547122080001021</request_id>
  <request_type>Hold</request_type>
  <title>Juan Rolfo : el arte de narrar /</title>
  <author>Perus, Francoise.</author>
  <pickup_location>Wadkins</pickup_location>
  <pickup_location_type>LIBRARY</pickup_location_type>
  <pickup_location_library>ONL</pickup_location_library>
  <material_type />
  <request_status>Not Started</request_status>
  <place_in_queue>1</place_in_queue>
  <request_date>2014-04-29Z</request_date>
</user_request>

<user_request>
  <request_id>1254709076000102</request_id>
  <request_type>Hold</request_type>
  <title>29041407BookingRequests2</title>
  <author>Symeonidis, Andreas, L.</author>
  <pickup_location>Law</pickup_location>
  <pickup_location_type>LIBRARY</pickup_location_type>
  <pickup_location_library>LAW</pickup_location_library>
  <material_type />
  <request_status>In Process</request_status>
  <request_date>2014-04-29Z</request_date>
  <task_name>Pickup From Shelf</task_name>
  <expiry_date>2014-06-06Z</expiry_date>
</user_request>
```

Figure 104 – Alma Requests API Response

# Collaborative Networks and Multicampus Institutions

The following section describes Alma enhancements provided for collaborative networks and multicampus institutions in the June 2014 release.

## Setting Network Zone (NZ) Import Profiles to Delete Records on Load

### Description

In a collaborative network, users who are loading records into the Network Zone have, until now, been unable to delete records that were no longer needed by the collaborative network. They could load resources as NZ administrators but could not delete any obsolete resources because the system was unable to ensure that a resource was not being used by a member institution before deleting it.

With the June release, Alma has put in place a system for checking whether a resource is being used by any institution in a collaborative network. When loading resources to the NZ, Alma can delete a resource if the following is true:

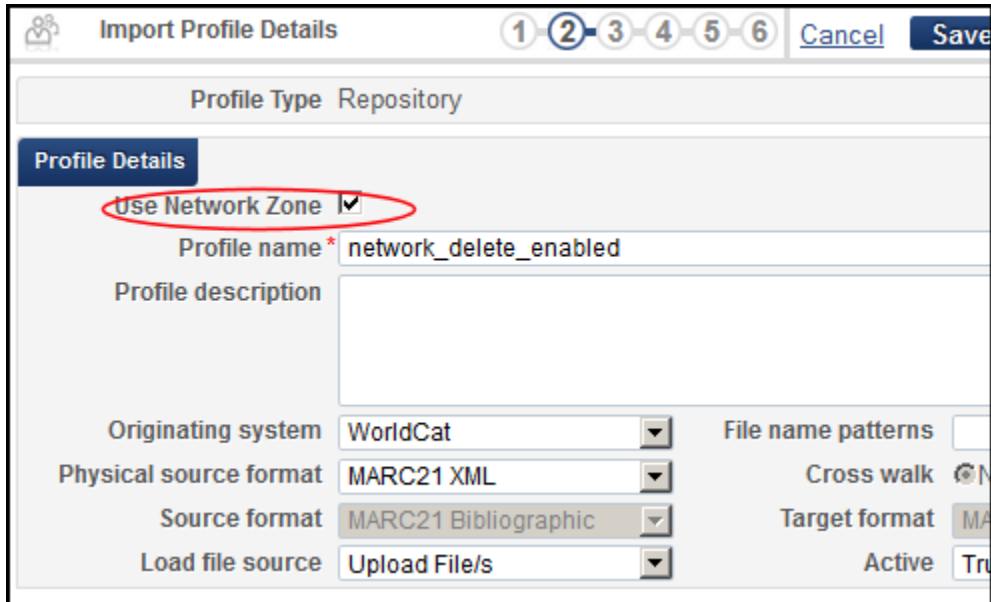
- The vendor has marked a resource as expired or otherwise unusable to the network.
- Check boxes for using the NZ and bibliographic record deletion have been selected by the user in the import profile.
- No member has any inventory associated with the record to be deleted.

### Technical Details

To work with import jobs on the Monitor and View Imports page or the Job History page, you must have one of the following roles:

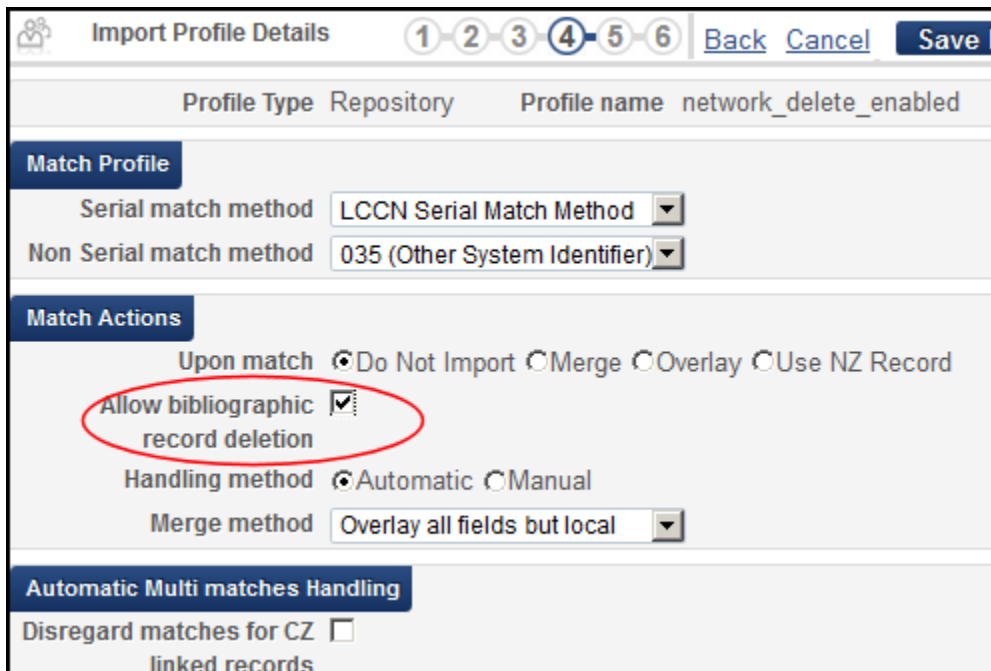
- Purchasing Operator
- Purchasing Manager
- Catalog Manager
- Catalog Administrator
- Acquisitions Administrator
- System Administrator

To allow the system to delete records from the NZ, the following check boxes must be selected during the creation of an import profile from the IZ (**Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles > Add New Profile** or **Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Import Profiles**).



The screenshot shows the 'Import Profile Details' form. At the top, there are navigation buttons 1 through 6, with button 2 highlighted. The form has a 'Profile Type' dropdown set to 'Repository'. Below this is a 'Profile Details' section. The 'Use Network Zone' checkbox is checked and circled in red. The 'Profile name' field contains 'network\_delete\_enabled'. Other fields include 'Profile description' (empty), 'Originating system' (WorldCat), 'Physical source format' (MARC21 XML), 'Source format' (MARC21 Bibliographic), and 'Load file source' (Upload File/s). There are also fields for 'File name patterns', 'Cross walk', 'Target format', and 'Active'.

Figure 105 - Use Network Zone Check Box



The screenshot shows the 'Import Profile Details' form, step 4. The 'Profile name' is 'network\_delete\_enabled'. The 'Match Profile' section has 'Serial match method' set to 'LCCN Serial Match Method' and 'Non Serial match method' set to '035 (Other System Identifier)'. The 'Match Actions' section has 'Upon match' set to 'Do Not Import' and 'Allow bibliographic record deletion' checked (circled in red). 'Handling method' is 'Automatic' and 'Merge method' is 'Overlay all fields but local'. The 'Automatic Multi matches Handling' section has 'Disregard matches for CZ linked records' unchecked.

Figure 106 - Allow Bibliographic Record Deletion

---

**Note:** These options appear either for the Update Inventory type or the Repository type.

---

The system checks to make sure no institutions are linked to the NZ record before deleting the record.

## Inherited Group Settings Indicator

For Network Zone (NZ) or multicampus environments that have group settings defined, the electronic collection, service, and portfolio editors display Available For inherited group settings from the higher level. The inherited group settings are listed after the Available For heading.

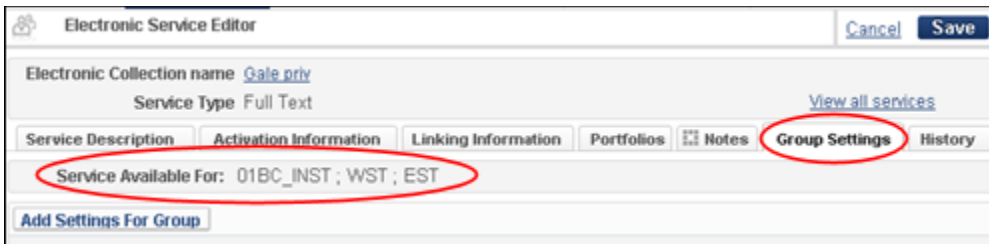


Figure 107 - Inherited Available For Group Settings

In the example shown above, the group settings are inherited from the electronic collection in which they were defined (see below).

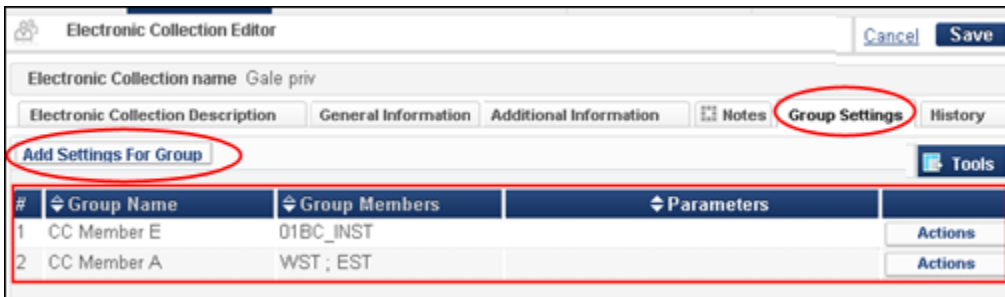


Figure 108 - Inherited Group Settings Defined

See below for an example of one of the portfolios that has inherited group settings from this same definition.



Figure 109 - Inherited Group Settings for a Portfolio

## Automatic Update of Linked User Records

A Fulfillment Network configuration allows patrons of one institution to receive fulfillment services, such as loans and requests, at another institution. As of the June release, each time a user from one institution borrows or places requests at another institution, this user's home institution contact information is refreshed at the servicing institution.

For information about Fulfillment Networks, refer to the *Alma Fulfillment Guide* or Alma online help.

## Other Collaborative Network/Multicampus Enhancements

- With the June release, Alma provides rapid service indicator (RSI) support for resources managed in the Network Zone in a collaborative network environment. RSI support now identifies full-text availability (by a green dot) in the Primo search results for NZ managed resources.
- The OpenURL returned to Primo has been enhanced to enrich the context object with content from the Alma NZ when no match is found in the Alma Institution Zone.

# Alma Interface Updates

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

## Quick Add Available for Code and Mapping Tables

The Quick Add feature is now available to add rows to code and mapping tables in Alma. The Quick Add feature has a distinctive look that differentiates it from the rest of the page. The advantages of this feature are that you can add information faster because only the Quick Add area refreshes instead of the whole page, and the page does not redisplay from the top after adding information. In addition, pressing the **Enter** key has the same functionality as clicking **Add**.

The following is an example of the Quick Add feature in a code table. (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configuration > Patron Groups**).

The screenshot displays the Alma interface for configuring a code table. At the top, the navigation bar includes 'ExLibris', 'Alma QA', and 'Currently at: Resource Sharing Library'. The main header shows 'Code Table' with 'Cancel', 'Translate', and 'Save' buttons. Below this, it indicates 'You are configuring: Main Campus' and provides a link to 'Organization Unit List'.

The 'Table Information' section shows the following details:

- Sub System: USER\_MANAGEMENT
- Updated By: exl\_impl
- Patron Facing: No
- Table Description: User groups
- Table Name: User Groups
- Updated on: 31/01/2013

The 'User groups' section includes a filter set to 'English' and an 'Import' button. Below this is a table with the following columns: Enabled, Display, Order, Code, Description, Translation, Default Value, Updated By, Last Updated, and Delete. The table contains 9 rows of data, each with a 'Delete' button.

At the bottom, there is a 'Create a New Code Table Row' section. A red box highlights the 'Quick Add' form, which includes input fields for 'Code', 'Description', and 'Default Value' (set to 'No'), and an 'Add Row' button.

Figure 110 – Quick Add – Code Table

The following is an example of the Quick Add feature in a mapping table. (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Patron Query Templates**).

The screenshot shows the Alma Mapping Table configuration page. At the top, it indicates 'You are configuring: Main Campus' and 'Organization Unit List'. The 'Table Information' section shows: Sub System: FULFILLMENT, Updated By: exl\_support, Table Name: PatronQueryTemplates, Last Updated: 27/04/2014, and Table Description: Patron Query Templates. %reqld% is substituted with the request external identifier. Below this is a table of 'Mapping Table Rows' with one row: Row 1, Enabled (checked), Name: Regarding your request, Subject: Your request (%reqld%), Header: Dear Sir/Madam, Query Line 1: [ please enter your query h, Query Line 2: This is the second line of tl, Last Updated: 27/04/2014, and a Delete button. A 'Quick Add' dialog box is open, allowing the user to create a new row by entering values for Name, Subject, Header, Query Line 1, Query Line 2, and Query Line 3, with an 'Add Row' button at the bottom.

Figure 111 – Quick Add – Mapping Table

## Exported Excel Format Enhanced

You can export the data from lists in Alma to an Excel spreadsheet. The formatting of this Excel has been enhanced:

- The heading at the top of each column is in a more legible font.
- The columns are auto-sized to fit content up to 50 characters.
- The following enhancements have been made to the **Date** and **Date and Time** columns of the Excel:
  - The column is in Excel date format and can be used in formulas, sorts, and filters.
  - If there is no date information, the field appears in the Excel as empty space instead of erroneous data.

- The following enhancements have been made to the **Date and Time** column of the Excel:
  - The time indicated in the column is in the local time zone of the viewer.
  - The format of the date is in the format configured by the institution.
  - Hovering over the **Expiration Date** column header displays the time zone of the date – for example, **Time Zone: Asia/Jerusalem**.

## Enhanced In List and Not In List Operators for Rules

### Description

The In List and Not In List operators for creating rules have been enhanced to display all of the options as check boxes. This allows you to view all the options at the same time and select multiple options without having to scroll through a drop-down list. This enhancement has been implemented wherever rules are configured in Alma.

### Technical Instructions

The following procedure provides an example of this enhancement.

#### To view the In List and Not In List operators:

- 1 On the Fulfillment Units List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Fulfillment Units**) select **Actions > Edit** for a fulfillment unit. The Edit Fulfillment Unit page opens.
- 2 In the **Fulfillment Unit Rules** tab, click **Add Rule**. The Fulfillment Unit Rules Editor page opens.
- 3 In the Input Parameter section, select **In List** or **Not In List** from the **Operator** drop-down list. The options are displayed as check boxes.

Input Parameters

No records were found.

**Name** **Operator**

[Possible Values >](#)

**Value**

**Select All**

<input type="checkbox"/> 01BC Undergraduate <input type="checkbox"/> 03BC Master's <input type="checkbox"/> 05BC Law Student <input type="checkbox"/> 07BC Law Faculty <input type="checkbox"/> 09Cross Registered <input type="checkbox"/> 11BTI Faculty <input type="checkbox"/> 13BLC <input type="checkbox"/> 15ERC Guest <input type="checkbox"/> 17Law Interlibrary Loan <input type="checkbox"/> 19Law Copy Center <input type="checkbox"/> 22Post Doctoral Student <input type="checkbox"/> 23Reserve <input type="checkbox"/> 26Law Carrel <input type="checkbox"/> 28Presidential Scholar <input type="checkbox"/> 30Bindery Commercial	<input type="checkbox"/> 02College of Advancing <input type="checkbox"/> 04BC Doctoral <input type="checkbox"/> 06BC Faculty <input type="checkbox"/> 08BC Staff <input type="checkbox"/> 10BC Alumni <input type="checkbox"/> 12BTI Student <input type="checkbox"/> 14Guest <input type="checkbox"/> 16Interlibrary Loan <input type="checkbox"/> 18Law Cite Check <input type="checkbox"/> 20Law Guest <input type="checkbox"/> 22Post Doctoral Student <input type="checkbox"/> 24Summer Student <input type="checkbox"/> 27College Bound <input type="checkbox"/> 29Bindery Shelf
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**Figure 112 – In List and Not In List Options**

- 4 Select the options you want or select **Select All** to select all of the options.
- 5 Click **Add Parameter** to add the input parameter to the fulfillment unit rule.

# 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.

# Fixed Issues

The following previous Known Issues have been fixed:

- For the newly combined electronic collections that contain both services and bibliographic records/URLs, the Electronic Resource Activation Task List (**Resource Management > Manage Inventory > Manage Electronic Resource Activation**) may exhibit faulty behavior:
  - Selecting **Un-suppress** from the **Actions** menu may result in the disappearance of the **Activate** item from the menu list.
  - Selecting **Done** from the **Actions** menu may result in unexpected behavior.
- The **Suppress/Unsuppress** option appears if the electronic collection has both an unsuppressed/suppressed bibliographic record and a URL associated with it. Selecting this option suppresses/unsuppresses the bibliographic record from being published to Primo. For the June release, the **Suppress/Unsuppress** option will appear regardless of whether a URL is associated with the electronic collection. In the meantime, if no URL is associated with the electronic collection, you can suppress/unsuppress it through the bibliographic record.
- If a circulation desk has an Acquisition Technical Services work order department, staff users should be able to receive items at the circulation desk. However, currently the following error is issued when attempting to receive items at such a circulation desk: "No acquisition department was selected."
- The **Rota Templates** link (**Fulfillment > Resource Sharing**) is visible to the Resource Sharing Partners Manager role in a library or an institution, as discussed in the Resource Sharing section of this document. An operator who is scoped for a specific library can view the institution-level templates in view mode, but should not be able to add templates. The **Add Template** button should therefore be disabled in view mode, but it is currently enabled.

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

For details, you can read the following:

[https://blogs.oracle.com/proactivesupportEPM/entry/obiee\\_problems\\_with\\_chrome\\_update](https://blogs.oracle.com/proactivesupportEPM/entry/obiee_problems_with_chrome_update)

[https://blogs.oracle.com/proactivesupportEPM/entry/update\\_to\\_obiee\\_chrome\\_30](https://blogs.oracle.com/proactivesupportEPM/entry/update_to_obiee_chrome_30)