Ex Libris Confidential

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Web address: http://www.exlibrisgroup.com

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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.

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- Documentation Highlights
- Feature/enhancement descriptions and technical instructions for the following Alma components and functional areas
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Alma March 2014 Release Highlights

Acquisitions

- Add Item Policy from PO Line Summary Page

  This new option allows for adding an item policy when adding items from the PO Line Summary page for physical items. (Previously, it was only possible to update the item policy using the Physical Item Editor.)

- Change Vendor in PO Line

  This great new enhancement allows you to change the vendor/vendor account details for PO/PO lines. This may be useful if, for example, the vendor merged with another vendor. This new feature is available via the new **Change Vendor on Order** link on the Acquisitions menu and/or the PO line form for PO lines in renewal.

- Un-receiving an Item

  It may happen that an item was mistakenly marked as received. A new enhancement allows for revoking the received status of an item. Items can be un-received only if they are still in the receiving department and have no requests or interested users associated with them.

- Additional DLF License Fields

  In order to keep current with data standards used by the Digital Library Federation (DLF) and other industry leaders, Ex Libris has updated the license fields configuration table (Terms Type) with a number of new fields in accordance with the DLF standard.

Resource Management

- Enhancing Inventory Enrichment

  Alma supports increasingly versatile generic publishing capabilities that can be used to integrate with third-party systems. In addition to the existing ability to incrementally publish data via files or OAI-PMH, the publishing profile now includes optional enrichment of inventory-related data as well as the ability to perform normalization (that is, reformatting) of the published data.

- Combining Search Sets

  A great new option in set management allows for creating a new (itemized) set based on the members of two existing sets. The AND, OR, and NOT operations can be used.

- Normalization Rule Improvements

  Improvements in normalization rule management allows more than one user (with permissions) to work with a rule, edit it, and apply it.

Fulfillment

- Configuring Hold Request Limits

  This enhancement allows for defining the maximum number of digital and physical hold requests by patron group. Once a patron's limit is reached, a block is invoked and no further hold requests can be placed for that user. Authorized staff can override blocks on the hold request.

- Fulfillment Configuration Utilities

  A great new feature enables the viewing of fulfillment configuration information for a specific item. You can search for an item and view the fulfillment unit name, rule, and TOU associated with the item; view the due date that would be calculated by the system for the given item and a given patron; and calculate the overdue fine for an item if it were to be returned later than its due time. This information can also be accessed when viewing a patron's loan information on the Patron Services page.

Analytics

- COUNTER Release 4 JR1 Support

  The purpose of this enhancement is to provide COUNTER Release 4 support in UStat. The March release includes support for JR1 reports in COUNTER 4.

Resource Sharing

- Send Query to Patron Option Includes Preset Content in Email

  The purpose of this enhancement is to include preset content in the body of the email that is sent to patrons when selecting the **Send Query to Patron** option on the Resource Sharing Borrowing Requests page. The content can be modified as needed.

Primo

- Display License Information in the View It Tab

  This great new feature allows customers to display an online resource's license information in the View It tab. The displayed terms of the license are configurable in Alma, as well as the license-related labels that will display in the View It tab.

Collaborative Networks

- Central Publishing to Primo Improvements

  The purpose of this enhancement is to improve the efficiency of publishing bibliographic records from a collaborative network's Network and Institution Zones to Primo.

Data Services

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

New Electronic Collections Added to the Alma CKB

The following packages were added to the Alma CZ during the period **27-January-2013 through 23-Febuary-**2014:

- JUSTICE SAGE Journal Premier 2013
- Sage Premier 2014
- JSTOR Business IV Collection

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:

- Bavarian Library Network
- DBC (The Danish Bibliographic Centre)

Alma Show Me How and Videos

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

Alma Show Me How – March

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 March release, the following Show Me How scenarios are available:

   - Combine Two Sets of Items
   - Create a Non-Returnable Borrowing Request
   - Un-Receive an Item
   - Change the Vendor of a Purchase Order
   - Resend a Purchase Order
   - Fulfillment Configuration Utility

Alma Videos – March

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

- Non-Returnable Borrowing Requests
- Interlibrary Loan with Due Date
- Fulfillment Configuration Utility
- Un-Receive an Item
- Display License Info in View It Tab
- Combine Two Sets of Items
- Change Vendor of a Purchase Order
- Resend a Purchase Order
- Import an Electronic Portfolio into a Global Collection
- Get It: Expand Search to Related Records Using NZ

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 February 2014 release:

- Configuring Search Indexes – This section has been revised and enhanced, and now includes the following mapping tables: Index Codes to Search Index Labels Mapping, Search Index Labels to Index Codes Mapping, and Object Type to Search Index Types Mapping (under Resource Management > Configuring Resource Management > Search Configuration).
- Request Priority – A new section that explains the way in which requests are currently prioritized by Alma was added to the Fulfillment component (under Fulfillment > Resource Requests > Monitor Requests and Work Orders).

The above will be available with the update of the documentation on the 2nd of March.

Acquisitions

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

Add Item Policy from PO Line Summary Page

Description

The purpose of this enhancement is to allow you to add an item policy when adding items from the PO Line Summary page for physical items. Before this enhancement, it was possible to update the item policy only via the Physical Item Editor.

Technical Instructions

The following roles can access this enhancement:

- Purchasing Manager
- Purchasing Operator

To add an item policy from the PO Line Summary page:

1 Open the PO Line Summary page for a physical item (**Acquisitions > Purchase Order Lines > Review**). The Item Policy field is available in the Ordered Items section.

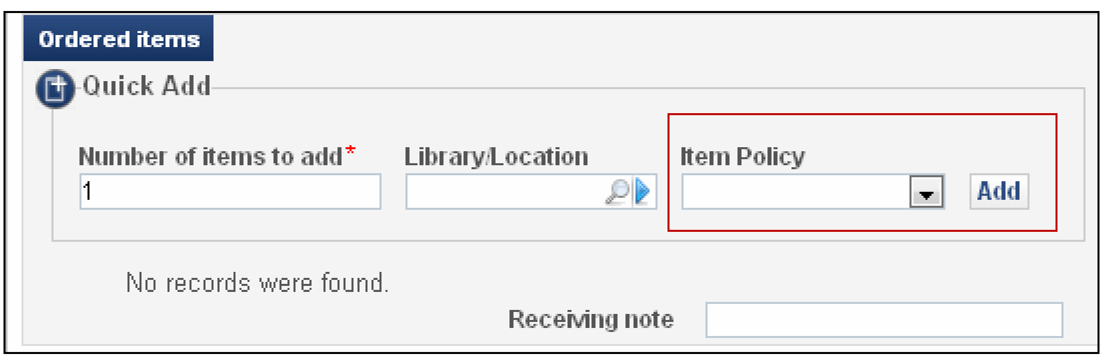


Figure 1 – Item Policy

2 Enter the number of items to add.

3 Select a library location.

4 Select an item policy from the drop-down list.

5 Click **Add**.

The items are added to the PO line with the item policy that you selected.

Change Vendor in PO Line

Description

The purpose of this enhancement is to allow you to change the vendor/vendor account details for PO/PO lines. This may be useful if, for example, the vendor merged with another vendor and changed its details. There are two scenarios where this can be performed:

- **During PO line renewal** – The PO line is sent to the new vendor. This option is available via the PO Line Summary page for PO lines in renewal.
- **For all orders** – The vendor details are changed to that of another vendor. This option is available via the new **Change Vendor on Order** link in the **Acquisitions > Advanced Tools** section of the Alma main menu.

Technical Instructions

The following roles can access this enhancement:

- Purchasing Manager
- Purchasing Operator

To change the vendor from the PO Line Summary page for PO lines in renewal:

1 On the PO Line Summary page (**Acquisitions > Purchase Order Lines > Renew > Edit**), select **Change vendor** from the drop-down list and click **Go**.

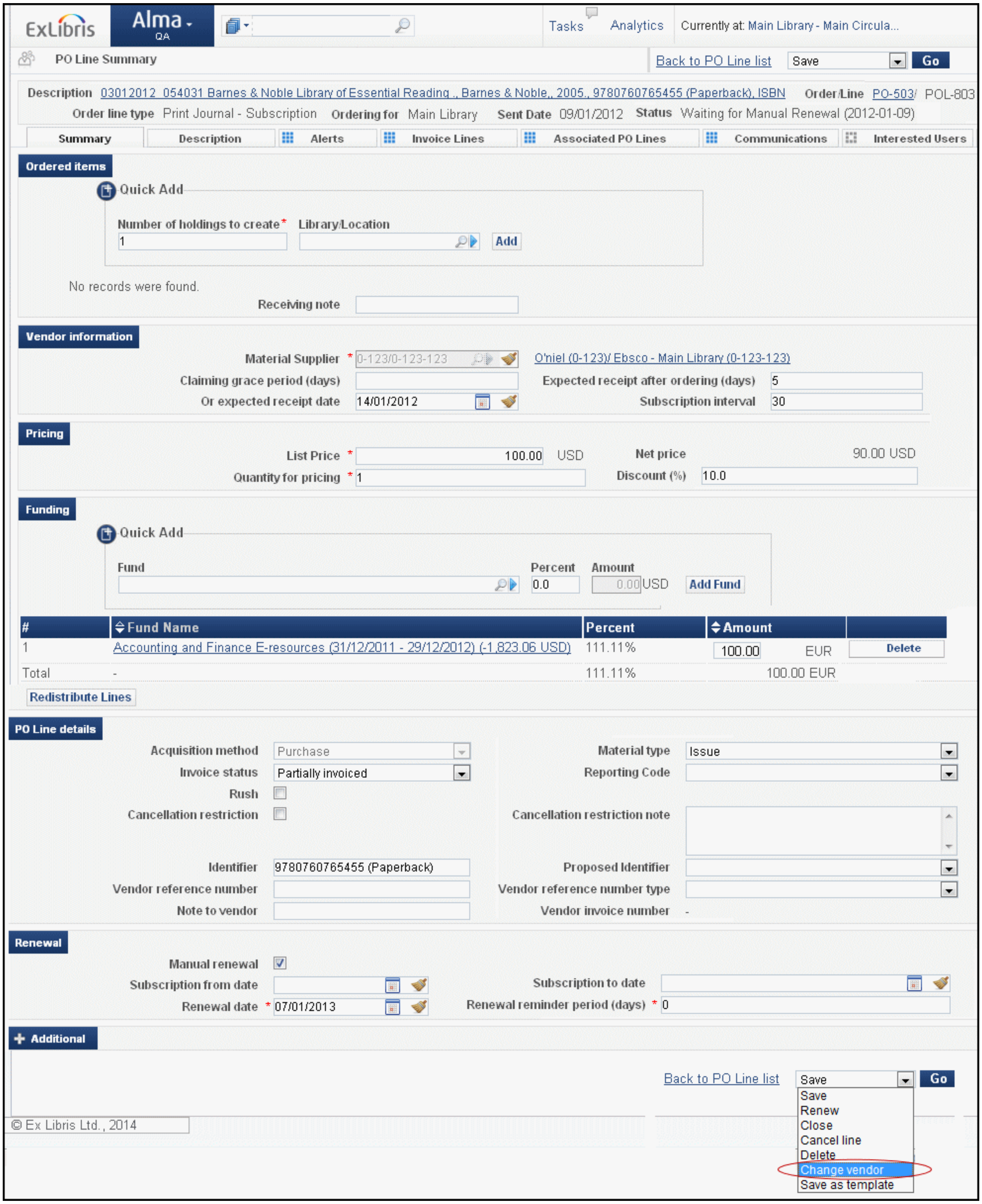


Figure 2 – PO Line Summary Page – Change Vendor

2 The following Confirmation message is displayed:

Figure 3 – Confirmation Message

3 Click **Confirm**. The following is displayed:

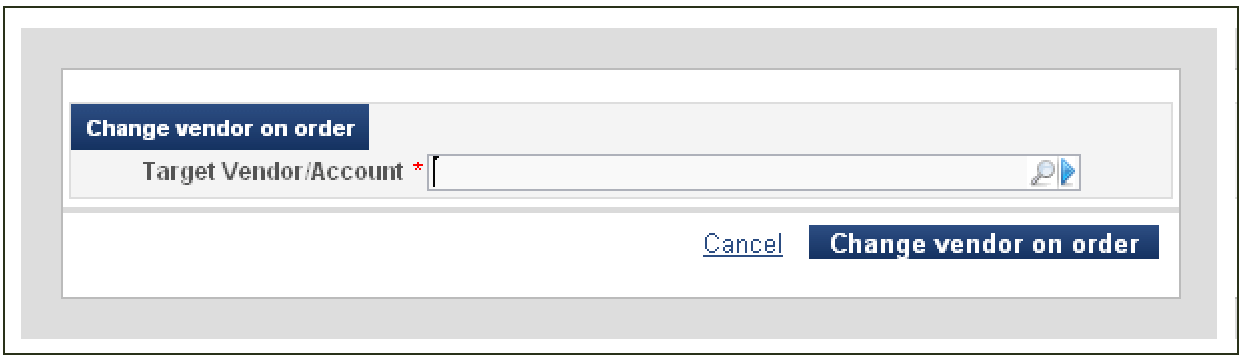


Figure 4 – Change Vendor on Order

4 Select the target vendor/account and click **Change Vendor on Order**.

The following occurs:

- The current PO line is closed.
- A new PO line for the new target vendor/account is created.
- The new PO line is associated with inventory from the closed PO line.
- The new PO line is set to In Review status from which the operator can update the new PO line with new information, according to the information communicated with the new target vendor.

To change the vendor account details from the Change Vendor on Order link in the Acquisitions section of the Alma main menu:

1 Click the new **Change Vendor on Order** link (**Acquisitions > Advanced Tools**).

Figure 5 – Change Vendor on Order

The Change Vendor on Order page opens:

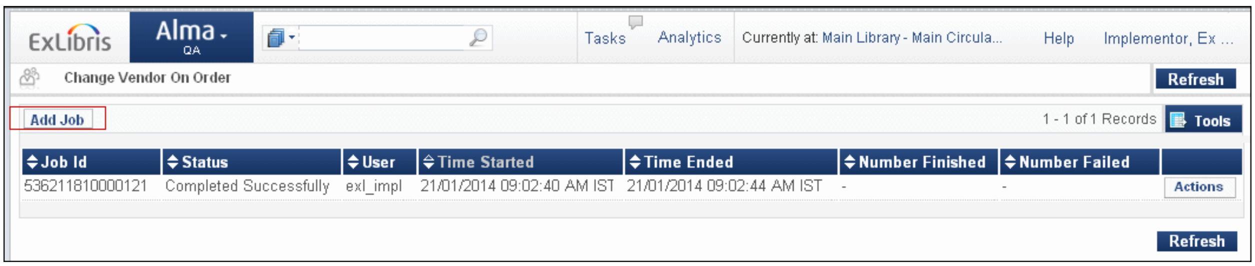


Figure 6 – Change Vendor on Order Page

2 Click **Add Job**.

The Add Job dialog box opens:

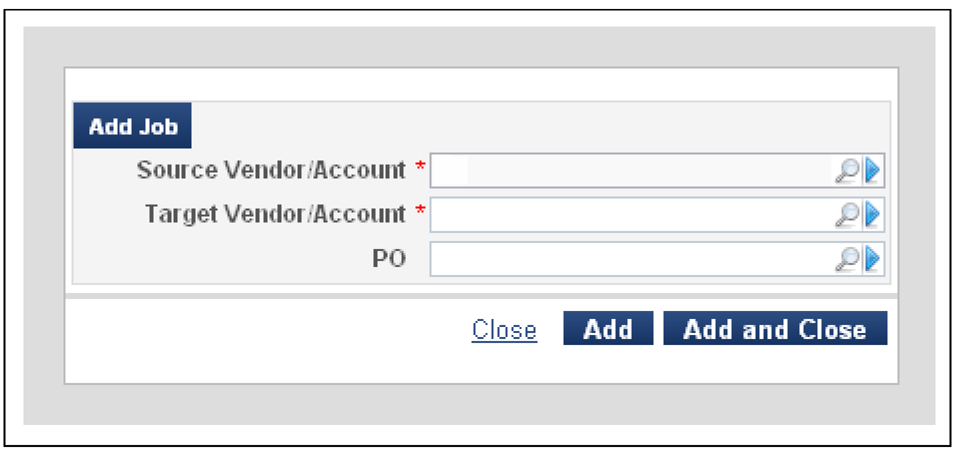


Figure 7 – Add Job

3 From the **Source vendor/account** browse options, select the original vendor.

4 From the **Target vendor/Account** browse options, select the new vendor.

5 If you want to restrict the vendor change to a specific PO, from the PO field, select a PO. The **Source vendor/account** field is disabled and displays the source vendor/account from the selected PO.

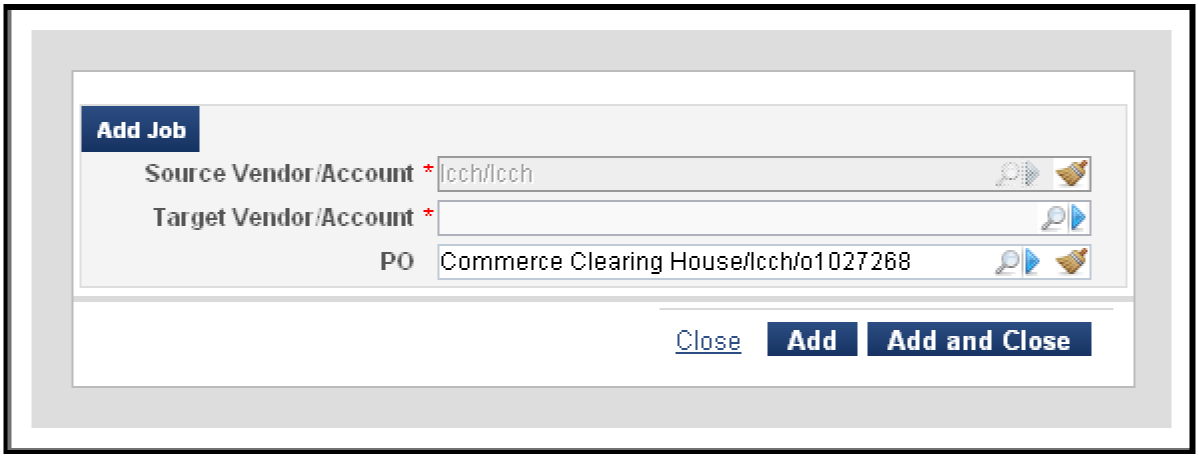


Figure 8 – Select PO

If no PO is selected, the change affects all active PO lines and POs for the selected source vendor/account.

6 Click Add or Add and Close.

The vendor/vendor account details for the PO/PO lines are changed without changing the status of the PO/PO lines.

Resend a PO

Description

The purpose of this enhancement is to allow you to resend an order to a vendor. Only orders that were actually sent to the vendor (acquisition method = purchase) can be resent. To enable this enhancement, the **Resend** button has been added to the PO Summary page.

Technical Instructions

The following roles can access this enhancement:

- Purchasing Manager
- Purchasing Operator

To resend a PO:

1 From the Search PO Line page (**Acquisitions > PO Lines > Search for PO Line**) enter `sent`. in the Find box and click **Go**. The Search for PO Line page opens with a list of sent PO lines.

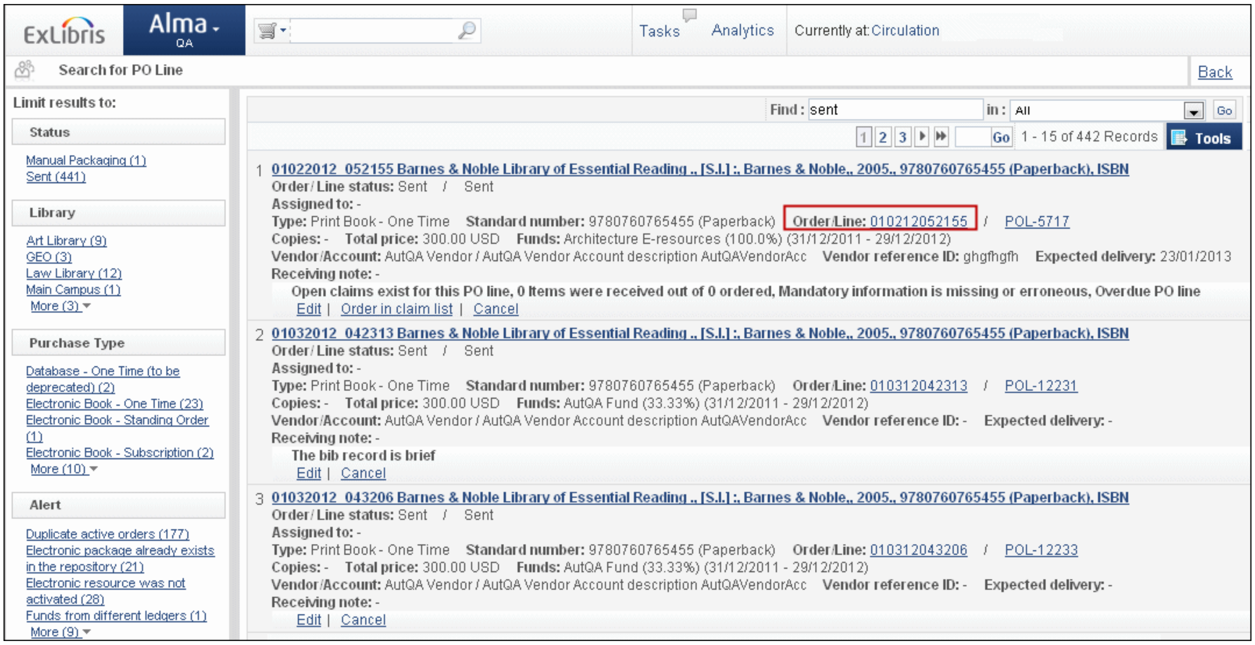


Figure 9 – Search for PO Line

2 Click the order of a PO line. The PO Summary page opens.

Figure 10 – Resend Order

3 Click **Resend** to resend the order.

The PO is resent to the vendor.

Un-receiving an Item

Description

The purpose of this enhancement is to allow you to revoke the received status of an item. This may be useful if an item was mistakenly marked as received. Items can be un-received only if they are still in the receiving department and have no requests or interested users associated with them.

Technical Instructions

The following role can access this enhancement:

- Receiving Operator

To un-receive an item:

1 Open the Receive New Material page (**Acquisitions > Receiving and Invoicing > Receive**).

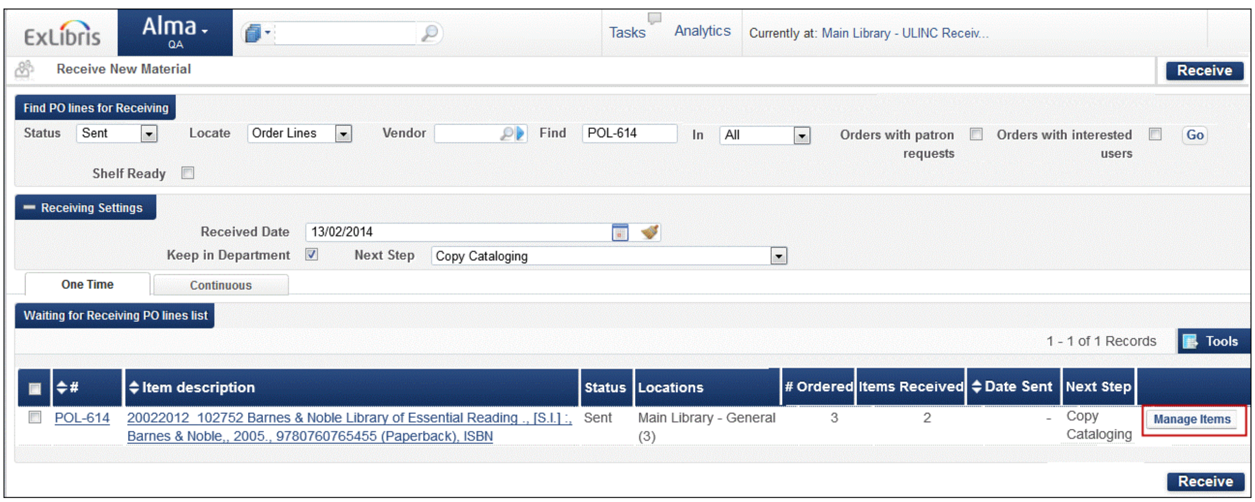


Figure 11 – Receive New Material

2 Click **Manage Items** for the item you want to un-receive. The Received Items List page opens:

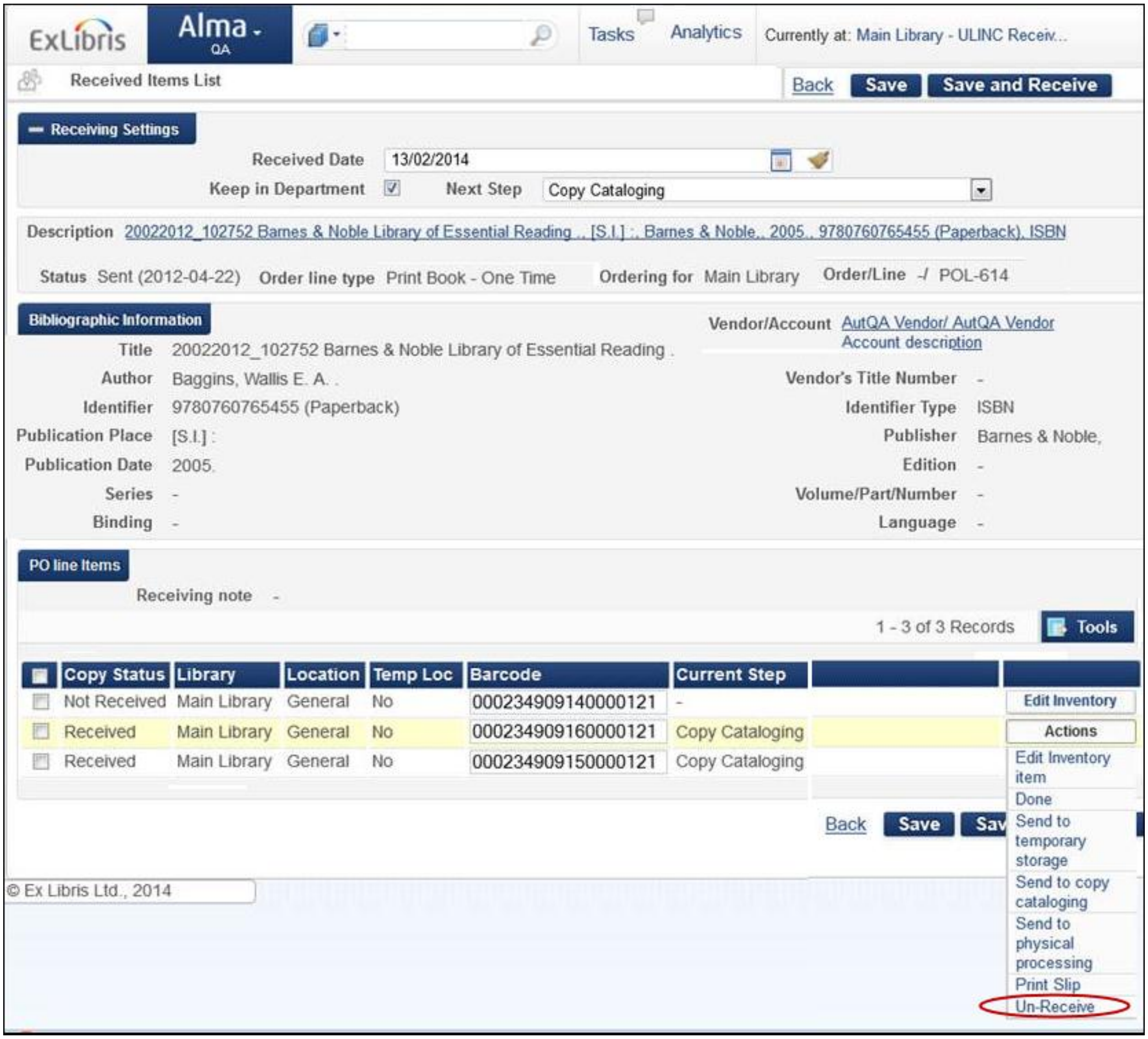


Figure 12 – Un-receive

3 Select **Actions > Un-receive** for the item that you want to un-receive. The following confirmation message is displayed:

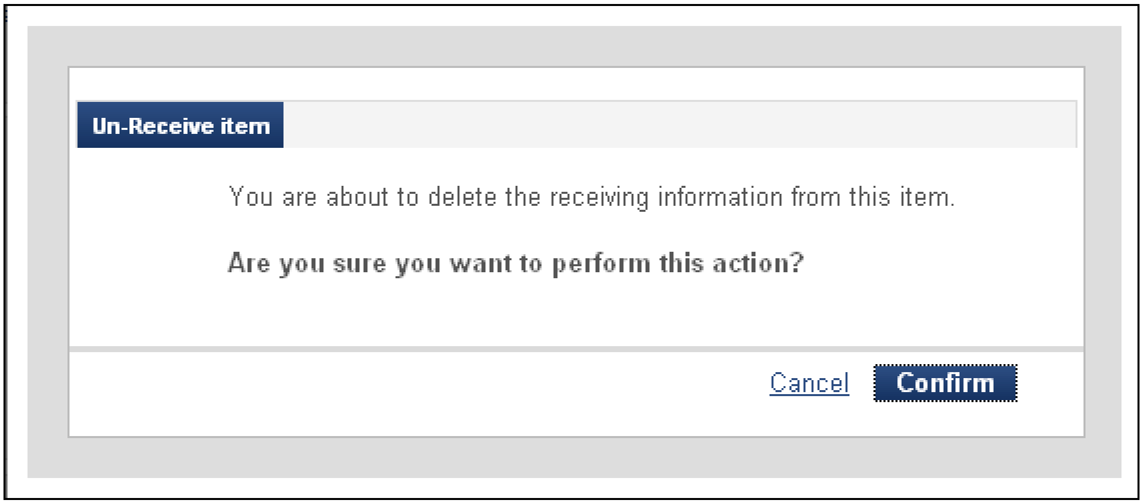


Figure 13 – Un-receive Confirmation Message

4 Click **Confirm**.

The status of the item now changes to **Not Received**.

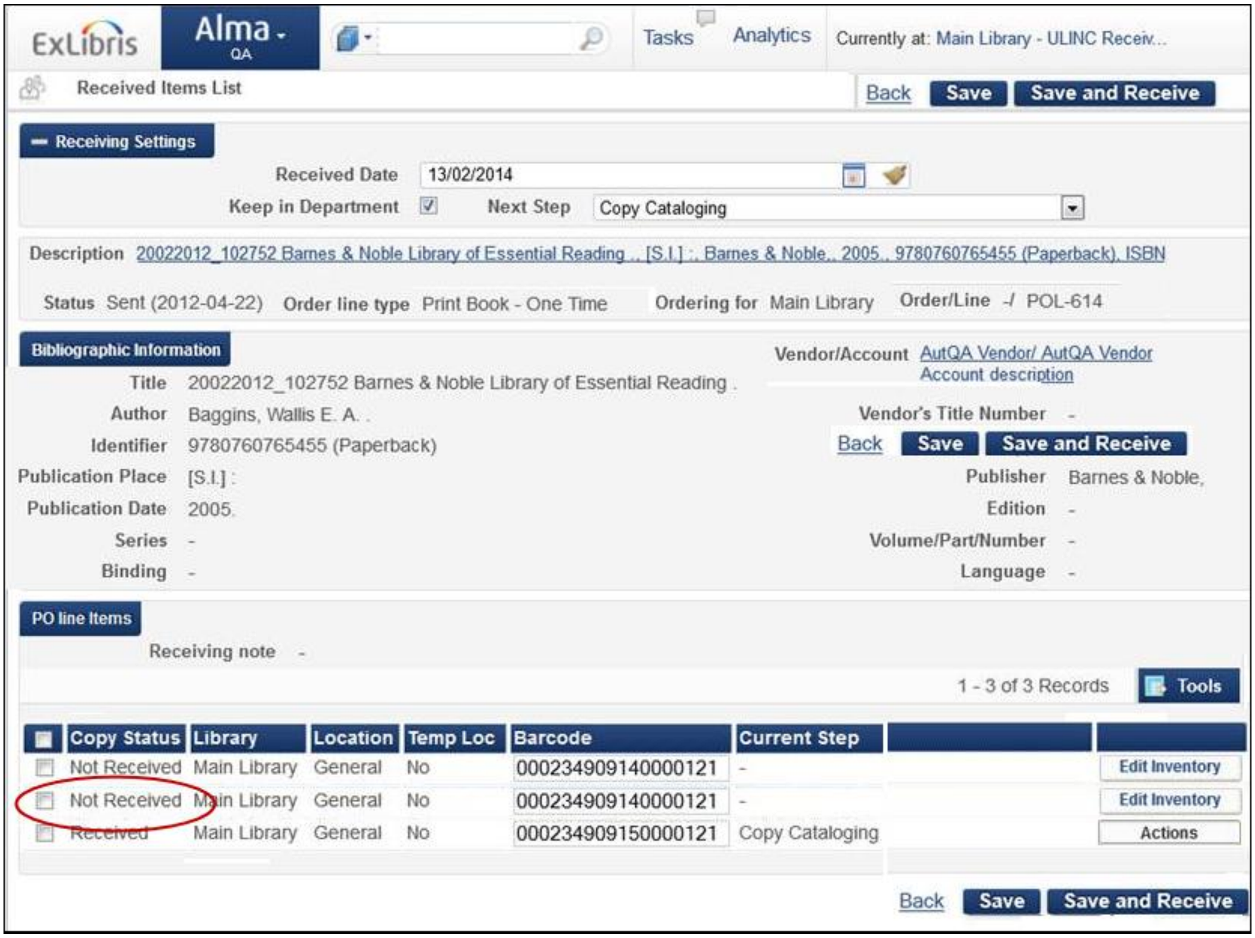


Figure 14 – Item Un-received

Support Invoicing Workflow for Non-ERP Institutions

Description

This feature addresses the requirements of customers who do not work with an ERP system. For these institutions, the workflow can accommodate the need to integrate invoices for internal copies.

In the absence of an ERP profile, the invoice workflow skips the step of Ready to be Paid and moves directly to a status of Waiting for Payment or Closed (depending on additional existing configuration).

A configuration parameter has been added to handle this process on a system-wide level.

Technical Instructions

The following roles can configure this option:

- Acquisitions Administrator
- General System Administrator

To change the invoice workflow so that it does not include steps related to working with ERP:

1. On the Acquisitions configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click **Other Settings** under **General**.

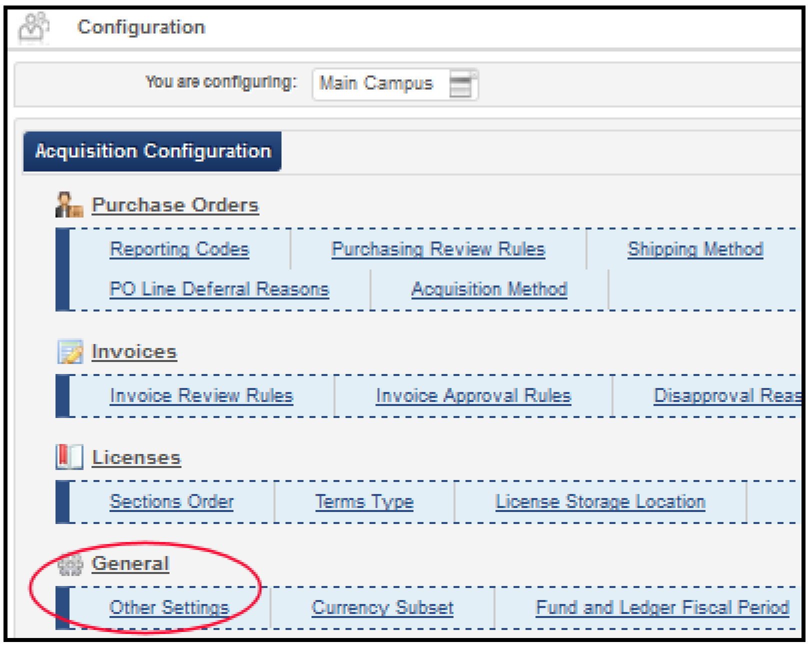


Figure 15 - Link to Customer Parameters Mapping Table

Your CustomerParameters mapping table opens (see figure below—some column widths adjusted for the purposes of this demonstration).

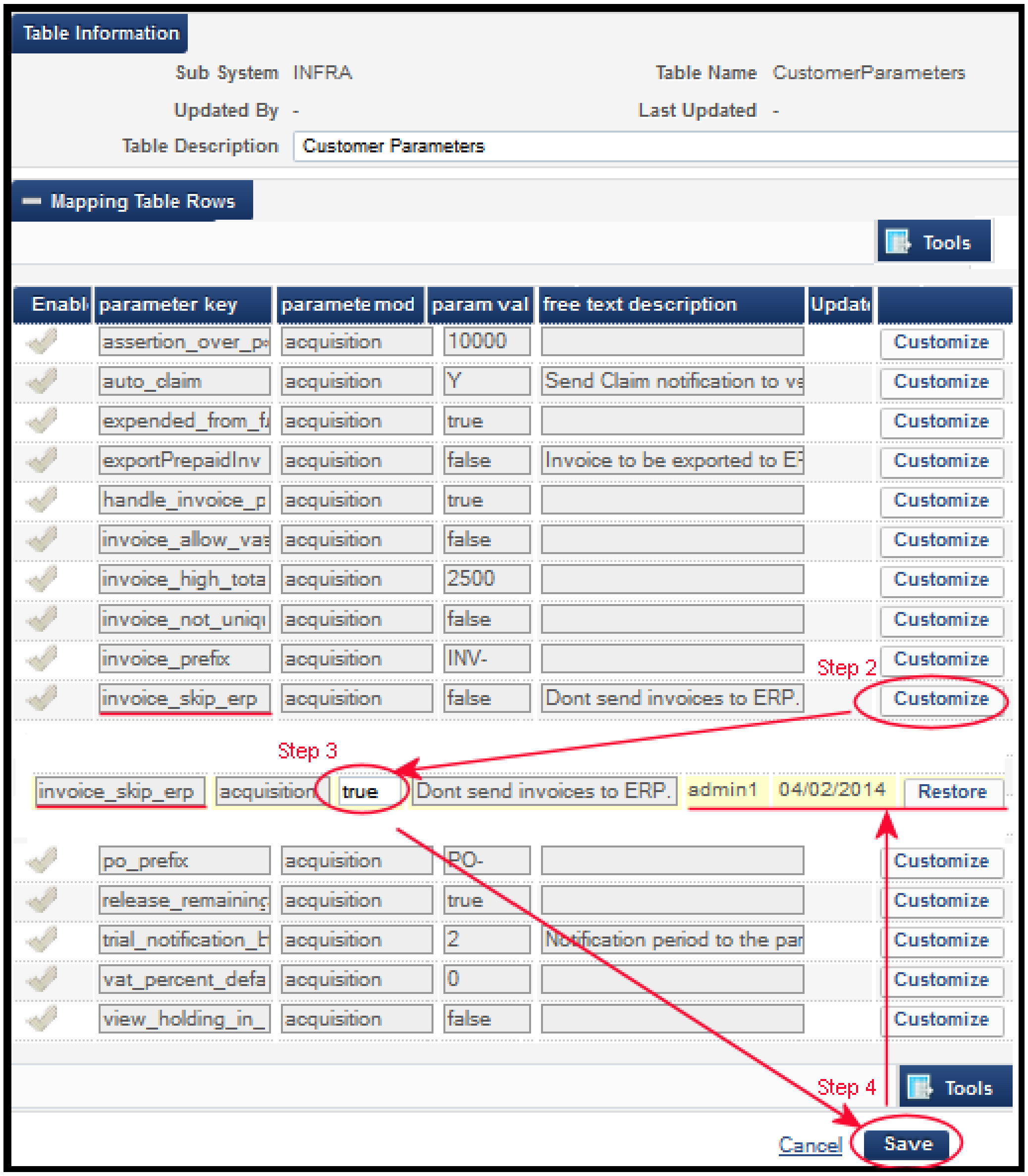


Figure 16 - Changing the Skip ERP Row

2 Find the row with the parameter key of `invoice_skip_erp` and click the **Customize** button.

3 Change the parameter value from `false` to `true`.

4 Click **Save**.

Additional License Fields

Description

In a continuing effort to provide all the necessary fields for migrating and integrating external systems with Alma, Ex Libris has added several new licensing fields.

Renewal type has been added to the License Term Details page with the following available values:

- Automatic
- Explicit

This can be seen in the image below.

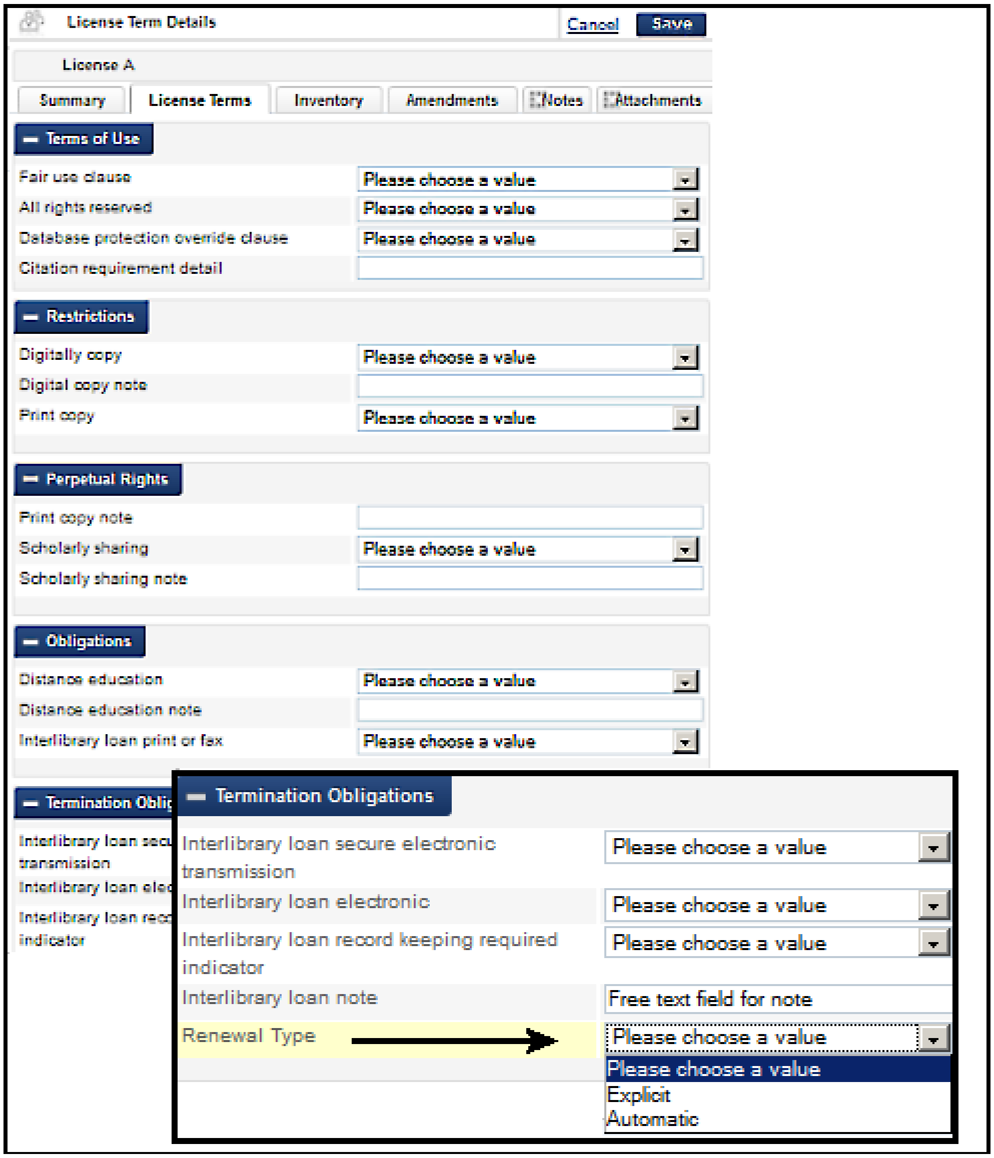


Figure 17 - Renewal Type Drop-down in License Terms Details

A field for **Licensing agent** was added to allow for the recording of a secondary handler or agent of the licensed material (for example, a subscription agent that facilitates a licensing transaction on behalf of one or more parties). The Licensing agent field links to the same list of vendors as the Licensor field selections.

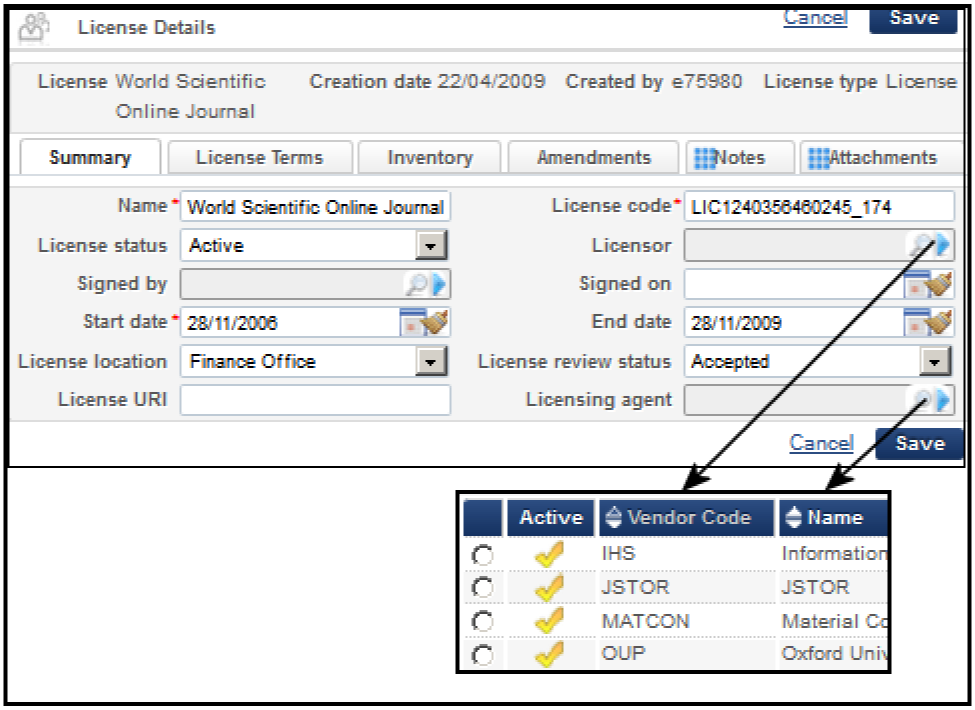


Figure 18 - Licensing Agent Selection List

In addition, to keep current with data standards used by the Digital Library Federation (DLF) and other industry leaders, Ex Libris has added DLF fields to the license fields configuration table (terms Type), so that they can be included in forms and fields on the licenses pages of Alma Acquisitions..

The following fields were added for compliance with DLF standards:

- Authorized User Definition (text)
- Local Authorized User Definition (text)
- Cure Period For Breach Unit Of Measure (select Calendar day, Business day, or Week)
- Licensee Notice Period For Termination Unit Of Measure (select Calendar day, Business day, or Week)
- Licensor Notice Period For Termination Unit Of Measure (select Calendar day, Business day, or Week)
- Non-Renewal Notice Period Unit Of Measure (select Calendar day, Business day, or Week)

The Authorized User field was added as a license section. (See the Technical Instructions below.)

Technical Instructions

The following roles can add new fields and sections:

- Acquisitions Administrator
- General System Administrator

To add a section header of Authorized User to your license template:

1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click **Sections Order** under **Licenses**.

The LicenseSectionsOrder mapping table opens.

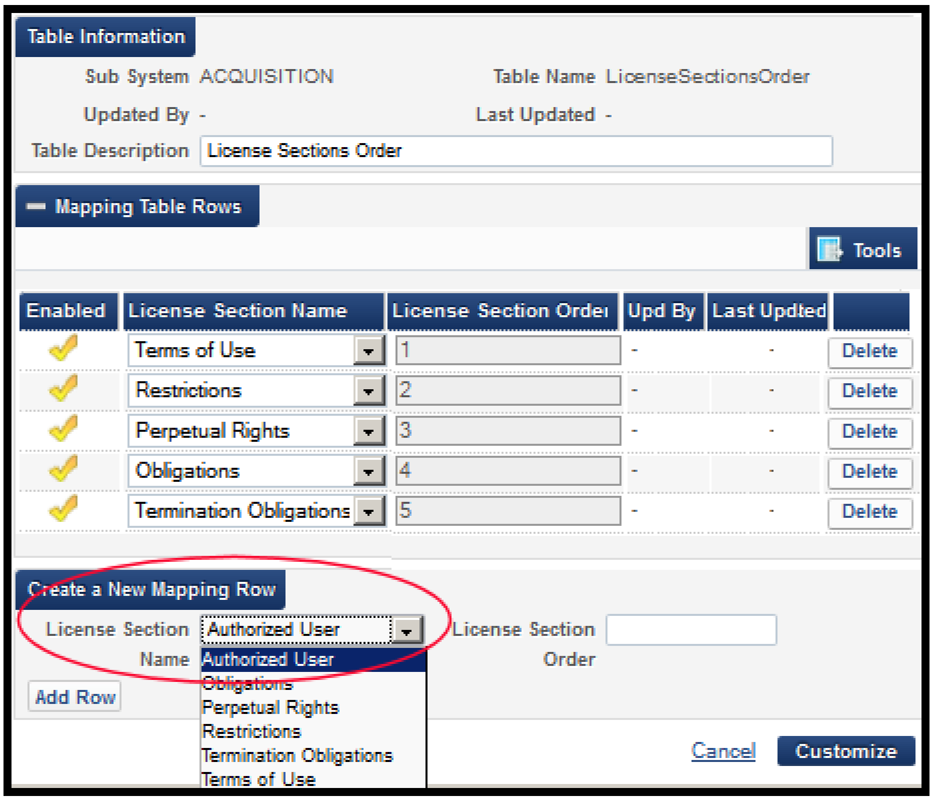


Figure 19 - License Sections Order Page

2 To add a new Authorized User section, select **Authorized User** from the **License Section Name** drop-down list.

3 Enter a number for the **License Section Order** field.

4 Click the **Add Row** button.

The new Authorized User row appears in the list of sections along with the numerical order in which it will appear on the page.

To add the Renewal type field to the termination obligations section of your license:

1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click **Terms Type** under **Licenses**.

Figure 20 - Acquisition Configuration, Terms Type

The LicenseTermsType mapping table opens.

2 Scroll to the Create a New Mapping Row section and select **Termination Obligations** from the **License Section** drop-down list.

3 Select **Renewal Type** from the **License term** drop-down list.

4 Enter an order number for displaying the new term and select **Yes** or **No** to display the field to the public.

Figure 21 - New License Term: Renewal Type

5 Click the **Add Row** button.

The system adds the new row with License Term equal to Renewal Type.

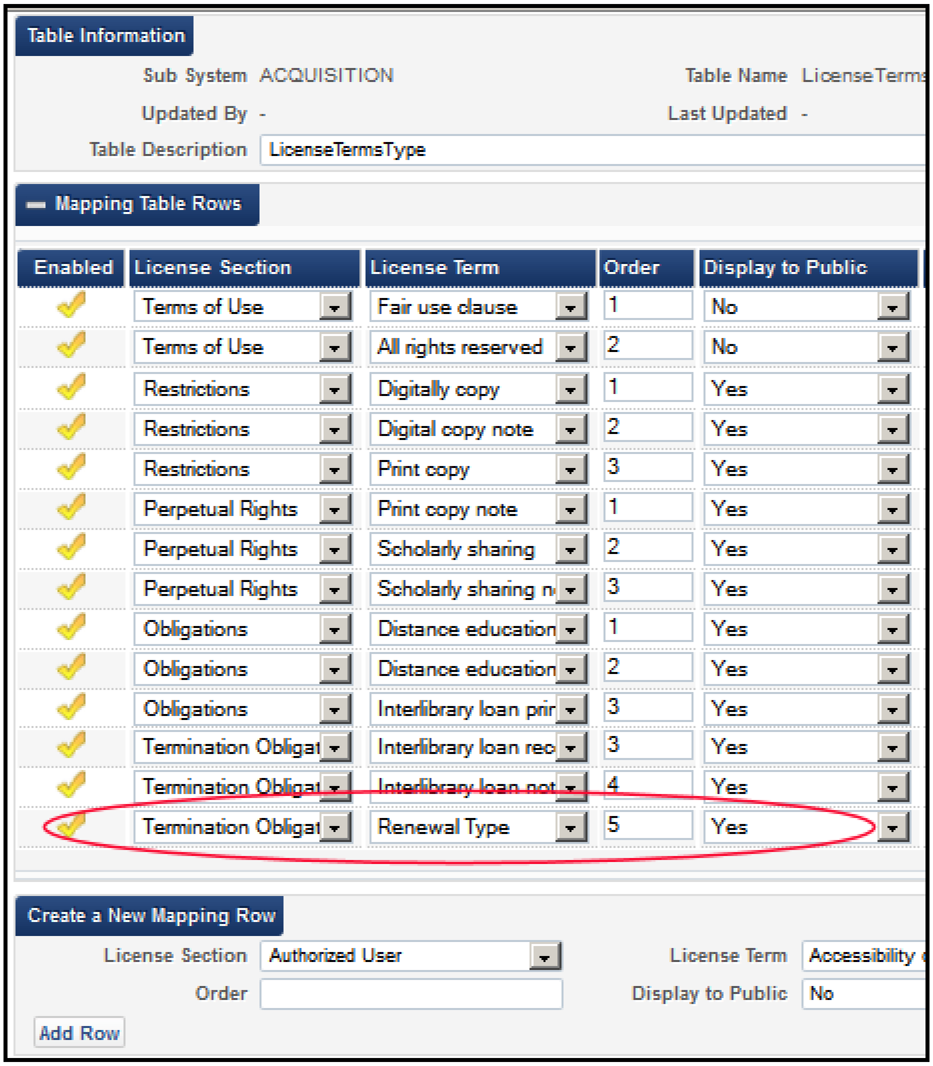


Figure 22 - Renewal Type Added to License Terms

The field appears on the License Term Details page (see Figure 17 - Renewal Type Drop-down in License Terms Details).

The following role can access the License agent field:

- License Manager

To use the License agent field:

1. Access the Summary tab on the License Details page (**Acquisitions > Acquisitions Infrastructure > Licenses**, then open an existing license for editing or click the **Add License** button).
2. On the License Details page, click the arrow beside the **Licensing agent** field.

3 Select a licensing agent from the list that opens. This selection can be the same as the **Licensor** selection (or different, if your agent/mediator differs from your supplier).

4 Click the **Select** button.

The Search Vendors page closes and your selection appears in the **Licensing agent** field.

Improved Exchange Rate Report

Description

This enhancement addresses complaints of performance regarding the report on currency exchange rates. Ex Libris has improved the report so that it returns more consistent results, allows for more variables, and provides a quick export to Excel.

Technical Instructions

The following roles can access and query exchange rate reports:

- Acquisitions Administrator
- General System Administrator

To use the tool:

1 From the Alma **Acquisitions** menu, select **Exchange Rates Report** in the Advanced Tools section.

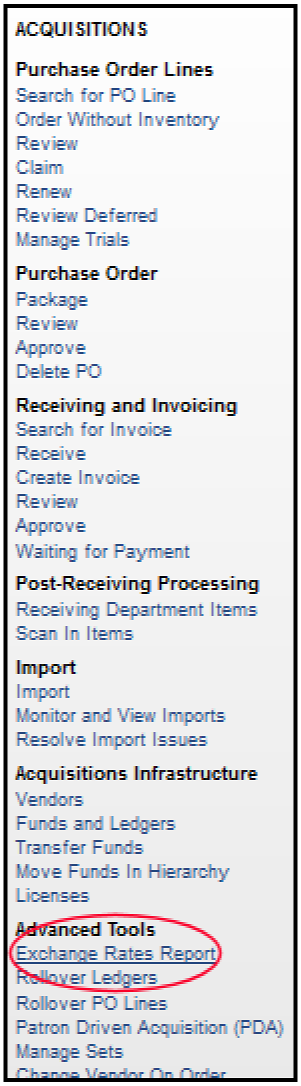
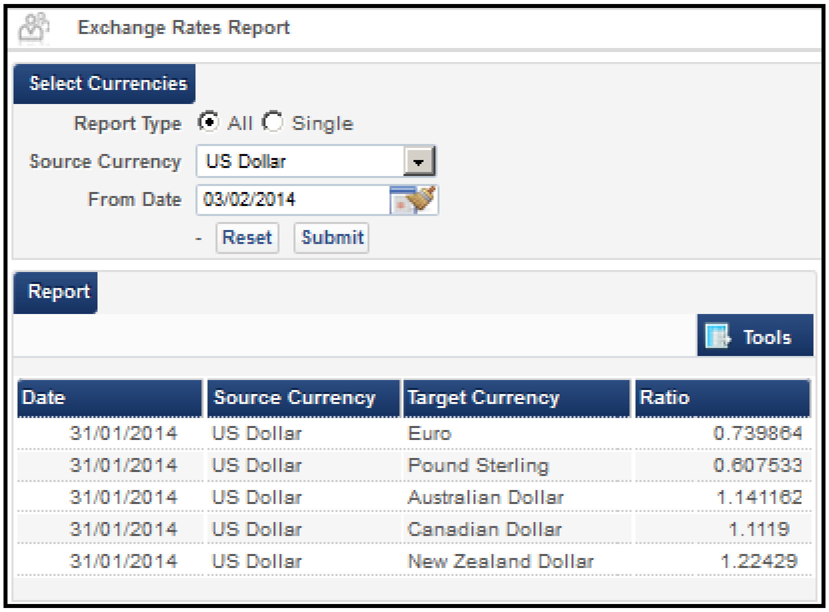


Figure 23 - Exchange Rates Report on Alma Menu

The Exchange Rates Report page opens. By default, the report shows the exchange rates of all the target currencies for the current date.

2 Change the date to view the currency rates on any date in the past.


Exchange Rates Report

Select Currencies

Report Type: All / Single

Source Currency: US Dollar

From Date: 03/02/2014

Reset Submit

Report

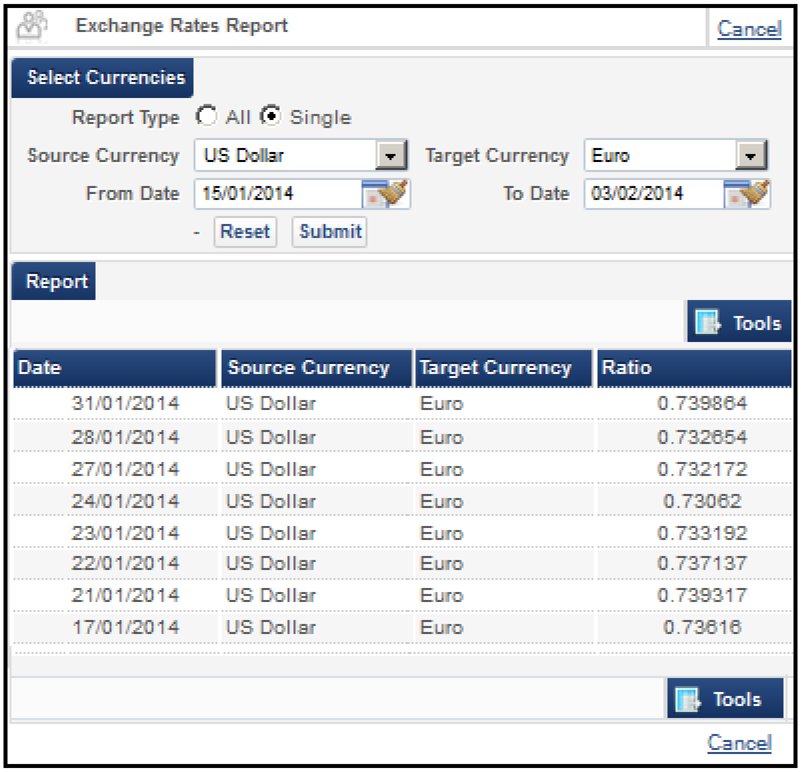
Tools

Date	Source Currency	Target Currency	Ratio
31/01/2014	US Dollar	Euro	0.739864
31/01/2014	US Dollar	Pound Sterling	0.607533
31/01/2014	US Dollar	Australian Dollar	1.141162
31/01/2014	US Dollar	Canadian Dollar	1.1119
31/01/2014	US Dollar	New Zealand Dollar	1.22429

Figure 24 - Exchange Rate Report - All

3. To change the report parameters to view a single target currency, select **Single** for **Report Type**.
4. Make any changes to currencies or dates. (Single currency allows you to view the changing rate of a target currency in relation to your base currency for a period of one month prior to the current date.)
5. Click the **Submit** button to run your query. To reset the parameters, click the **Reset** button.

   Alma returns results from your custom query in the Report section of the page.



Date	Source Currency	Target Currency	Ratio
31/01/2014	US Dollar	Euro	0.739864
28/01/2014	US Dollar	Euro	0.732654
27/01/2014	US Dollar	Euro	0.732172
24/01/2014	US Dollar	Euro	0.73062
23/01/2014	US Dollar	Euro	0.733192
22/01/2014	US Dollar	Euro	0.737137
21/01/2014	US Dollar	Euro	0.739317
17/01/2014	US Dollar	Euro	0.73616

Figure 25 - Exchange Rate Report - Single

Other Acquisitions Enhancements

- It is now possible to add notes to POs, PO lines, and invoices that have the status **Closed**.
- A new scheduling option, **Every day at 18:00** (time=data center time) was added to the Export Invoices to Payment section of the Finance integration profile (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles**).

Resource Management

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

Integrate Import Process with CZ Packages

Description

The March release expands the capabilities of importing electronic resources in the context of packages. It is now possible to import electronic resources to a Community Zone (CZ) package that is available in your institution. Previously, Alma could import electronic resources into a local package only.

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

- If the loaded electronic resource matches a global portfolio in the inventory, Alma skips the update, allowing the CZ to manage the updates for this portfolio.
- If the loaded electronic resource matches a local portfolio in the inventory, Alma will update it.
- If the loaded electronic resource does not match a portfolio, Alma creates a local portfolio for the resource and links it to the selected package (either local or CZ).

Technical Instructions

The following roles can access this enhancement:

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

To import electronic resources into CZ packages:

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

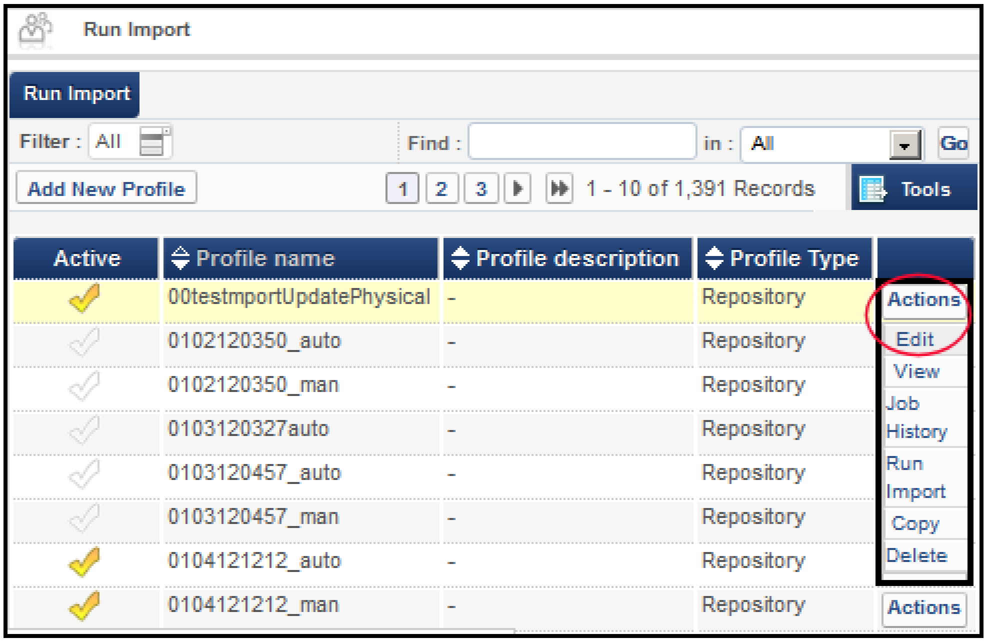


Figure 26 - Import Configuration - Run Import Page

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

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

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

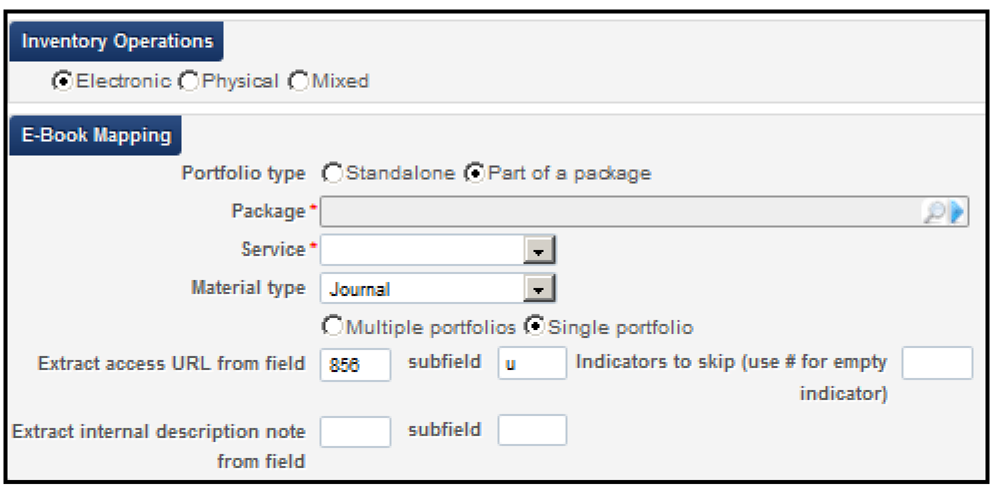


Figure 27 - Inventory Information Tab (or Wizard Step) with Electronic Mapping Fields

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

Note: This type of import portfolio works only when **Electronic** or **Mixed** is selected.

5. For **Portfolio Type**, select **Part of a package** to import portfolios into an available package and corresponding service.
6. In the **Package** field, search for the CZ package that you want to update and select it.

Refer to the *Alma Resource Management Guide* or Online Help for complete instructions on how to add and update import profiles.

Efficient Management of Import Errors

Description

This enhancement introduces the following efficient actions for managing errors that might occur during the import process:

- **Do Not Import** – Discards the records with import errors, while importing the valid records in the file.
- **Reject File** – Discards the file containing records with import errors. The file is removed from the Resolve Import Issues page or Handle Import Validation Errors page.

For more information on the Do Not Import and Reject File actions, see the *Alma Resource Management Guide* or Online Help.

Technical Instructions

The following roles can access this enhancement:

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

To perform multiple Do Not Import and Reject File actions on imported file records:

1. On the Resolve Import Issues page (**Resource Management > Import > Resolve Import Issues > Matching**) or the Resolve Import Validation Errors page **Resource Management > Import > Resolve Import Issues > Validation**), select the issues on which you want to perform the Do Not Import and Reject File actions.
2. Click the **Do Not Import Selected** or **Reject Selected** buttons.

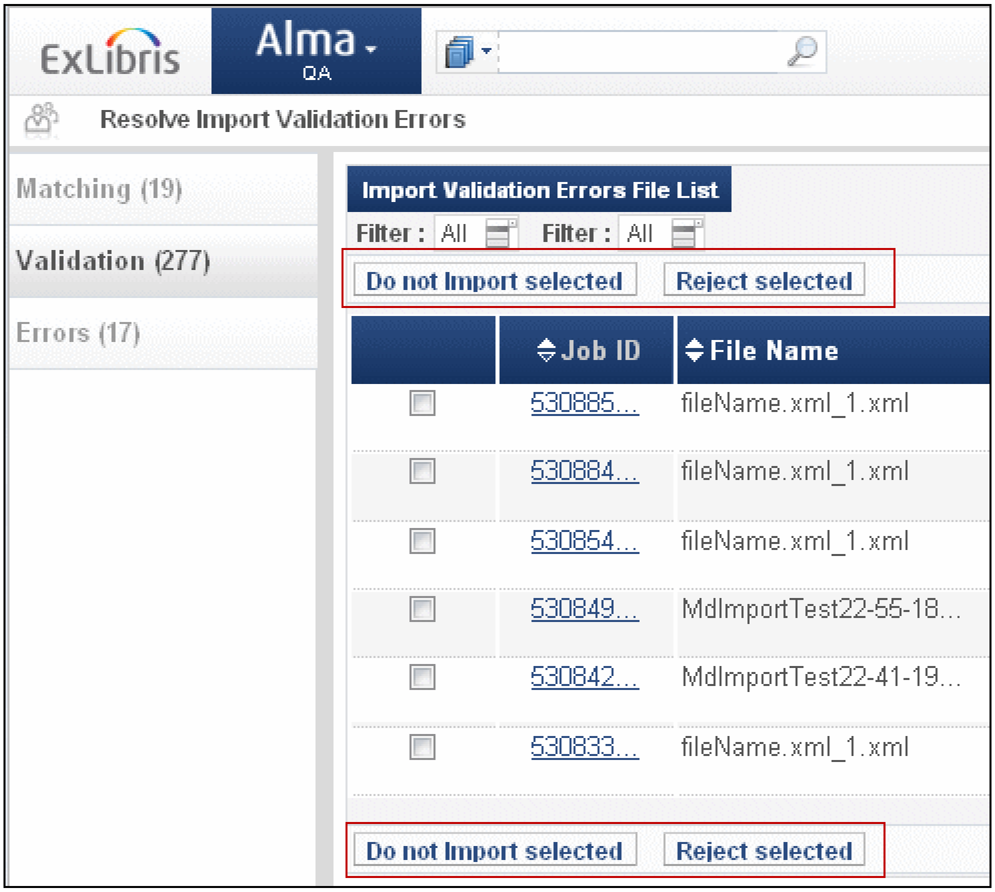


Figure 28 –Do Not Import Selected and Reject File Buttons

The action is performed on the selected files.

To perform the Do Not Import and Reject File actions with the Actions button:

On the Resolve Import Issues page (**Resource Management > Import > Resolve Import Issues > Matching**) or the Resolve Import Validation Errors page **Resource Management > Import > Resolve Import Issues > Validation**), select **Actions > Do not import** or **Reject file** for the required file.

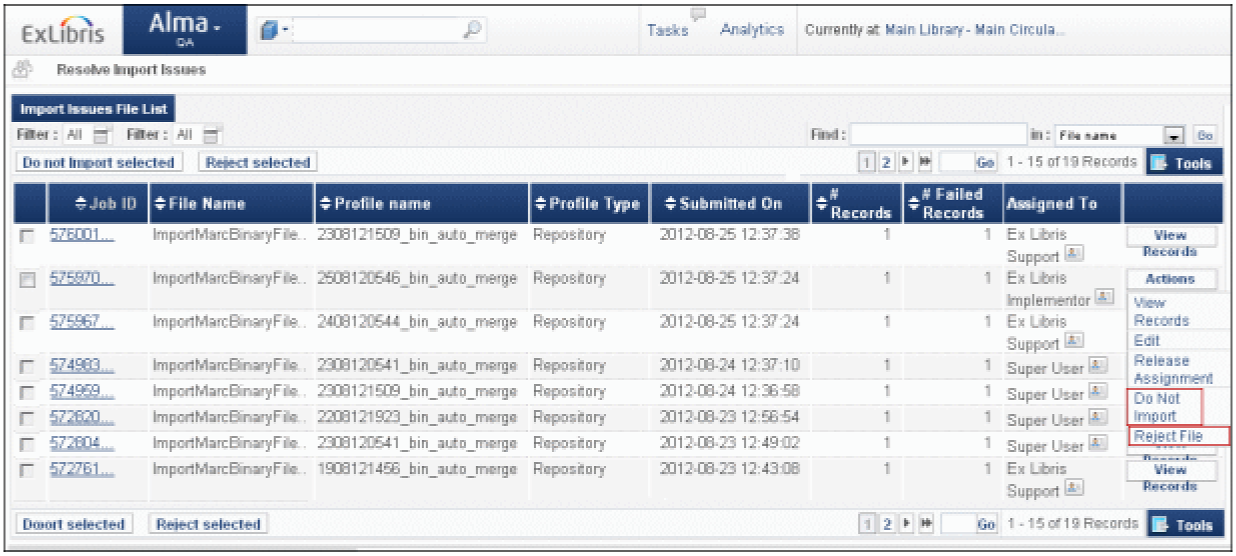


Figure 29 –Do Not Import and Reject File

The action is performed on the selected files.

Enhancing Inventory Enrichment

Description

This solution is part of an increasingly versatile, generic publishing model to be used for integrating Alma with third-party systems.

In addition to the existing ability to incrementally publish data through files or OAI-PMH, the publishing profile now includes optional enrichment of inventory-related data and the ability to perform normalization (reformatting) of the published data.

Specifically, the optional enrichment of inventory data adds a holdings representation field (in 852), including three subfields: the library (b), the location (c), and the call number (h). In addition to this, a deletion indication appears in the LDR pos 5, so that when a record is deleted from Alma or removed from the set, the third-party system receives this indication.

For example, this enrichment can be used to perform ongoing publishing to COPAC (a third-party entity that enables searching the catalogues of over 70 libraries at once, including the UK national libraries, university libraries, and specialist libraries).

Technical Instructions

The following roles can create a publishing profile:

- Catalog Administrator
- Repository Administrator
- General System Administrator

To create a profile for publishing to an external target:

1. On the Resource Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** under **Record Export**.

Figure 30 – Resource Management Configuration Page

The Publishing Profiles page opens with a list of available publishing profiles.

Figure 31 – Publishing Profiles List Page

2 Click the **Add Profile** button and select **General Profile**.

The first page of the add profile wizard opens.

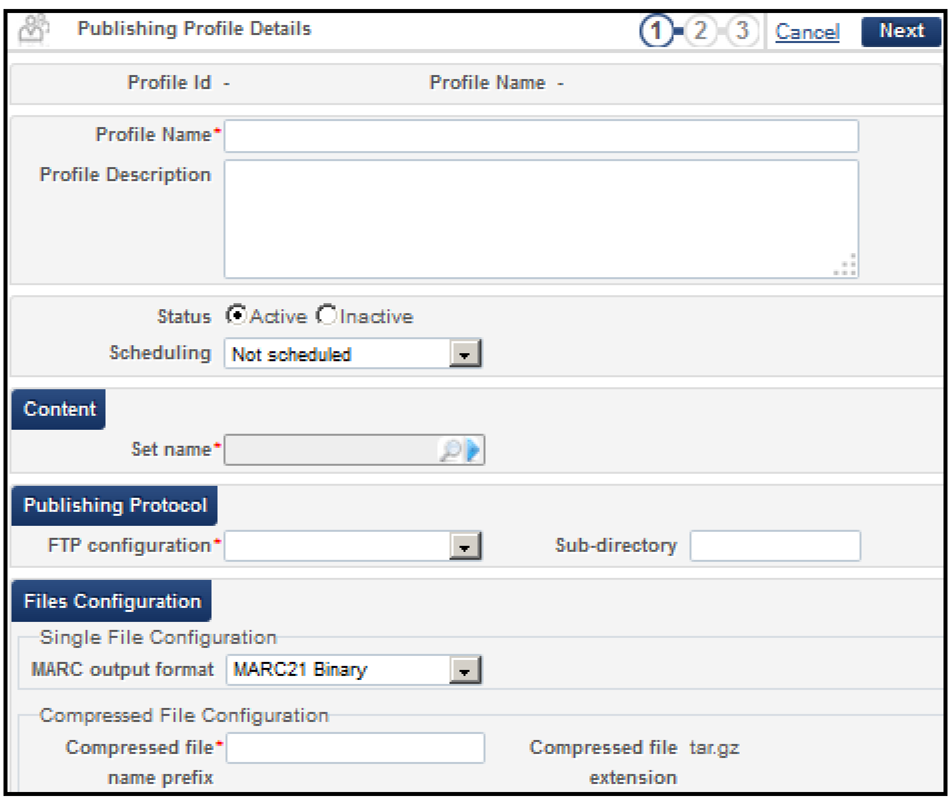


Figure 32 – New Add Profile Page

3 Enter values in the required fields. Sample entries appear in the figure below.

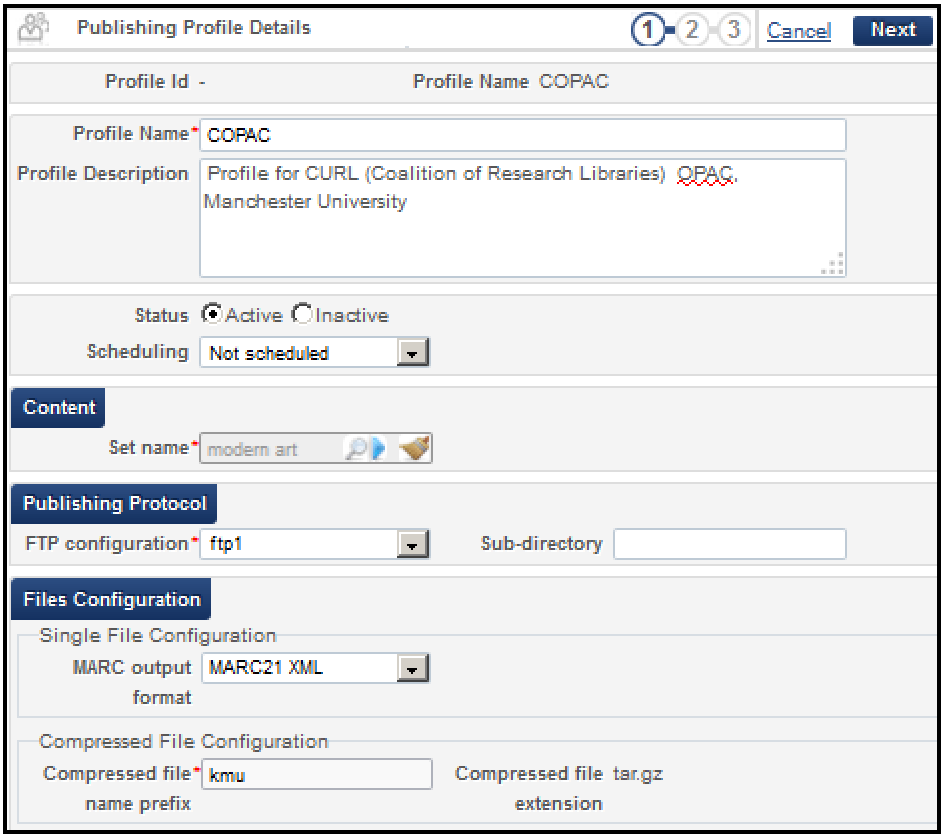


Figure 33 - Adding a Publishing Profile, Wizard Page 1

Note: The Set name selections are populated by your institution, and the **FTP configuration** field values come from your institution's setup of the protocol (**Administration > General Configuration > Configuration Menu > External Systems > Allowed S/FTP Connections**).

---

4 Click **Next**.

The second page of the wizard opens.

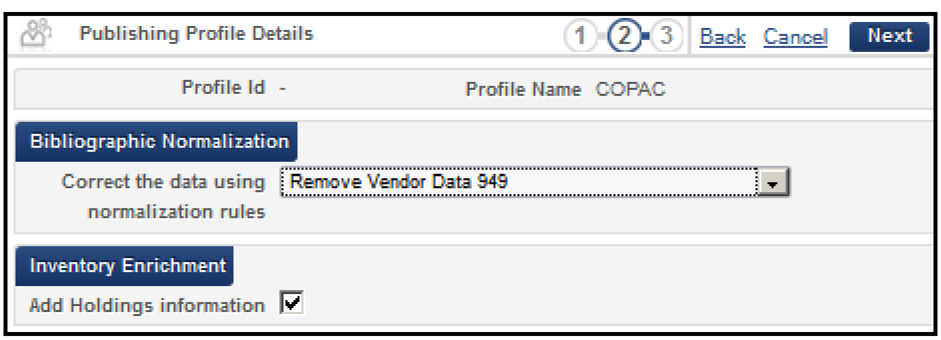


Figure 34 - Adding a Publishing Profile, Page 2, Normalization and Enrichment

5 Select a bibliographic normalization rule from the drop-down field.

6 To add physical holdings information to bibliographic data, click the **Add Holdings Information** check box.

7 Click **Next**.

The third page of the wizard opens.

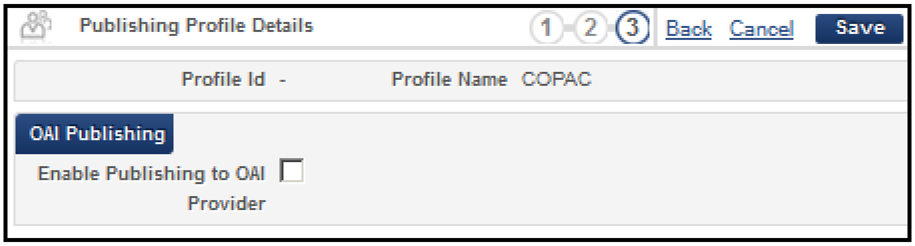


Figure 35 - Adding a Publishing Profile, Page 3, Enable OAI Provider

8 To enable publishing to an OAI provider, select the check box.

9 Click **Save** to enter the profile in the database and return to the Publishing Profiles list page.

Export Portfolios List Button Moved to Tools Button

Description

The functionality of the **Export Portfolios List** button located under the Portfolio tab of the Electronic Service Editor has been moved under the **Tools** button and is now labeled **Extended Export**. Clicking this link exports the list with extended information to an Excel spreadsheet. Clicking the **Excel (Current View)** link also located under the **Tools** button exports only the fields displayed in the list to Excel.

Technical Instructions

The following roles can access this enhancement:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)

To display the Extended Export button:

1 Perform a repository search for an electronic collection.

2 Click **Edit Service** for a collection.

3 Click the **Portfolios** tab.

4 Click the **Tools** button.

The **Extended Export** option is displayed.

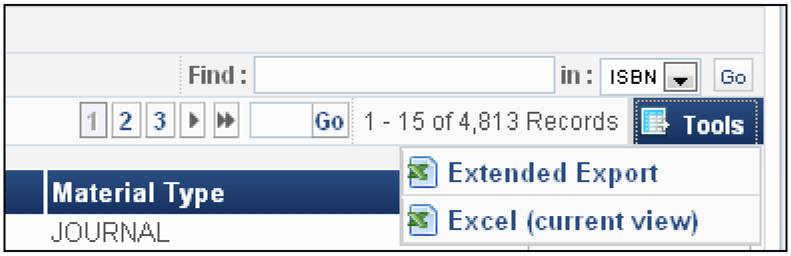


Figure 36 –Extended Export

Combining Sets

Description

The purpose of this enhancement is to allow you to create a new set based on the members of two existing sets. The AND, OR, and NOT operations are available. The combined set is an itemized set.

Technical Instructions

The following roles can access this enhancement:

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

To combine sets:

1 On the Manage Sets page (**Resource Management > Search and Sets > Manage Sets**), select **Actions > Combine sets** for a set in the list.

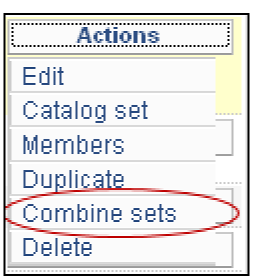


Figure 37 – Combine Sets

The Set Details page opens with the Combine Sets section:

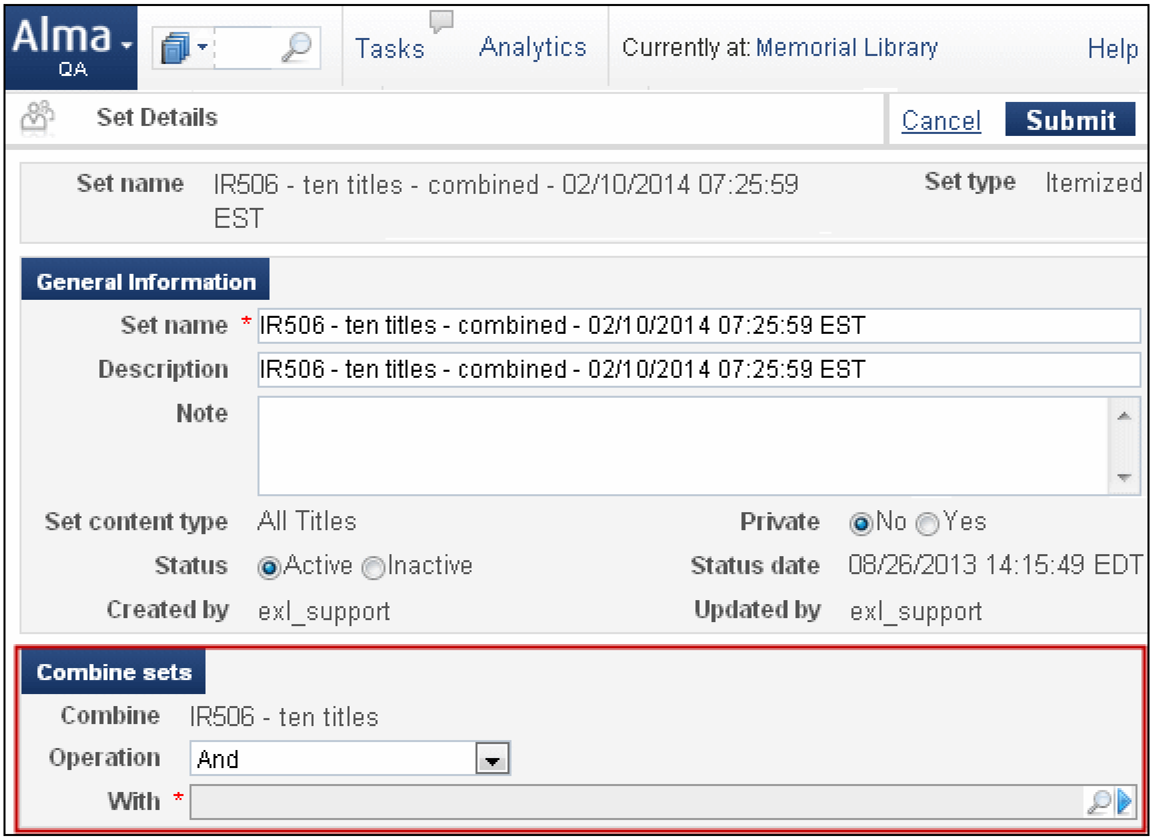


Figure 38 – Set Details

2 Select an Operation from the **Operation** drop-down list:

- And – Include only the members in common between the two sets in the new combined set.
- Not – Include only the members that are in the first set and not in the second set in the new combined set.
- Or – Include all of the members in both of the sets in the new combined set.

3 Click  from the **With** field to display the Set Details page.

4 Select the set that you want to combine with the first set you selected.

5 Click **Submit**. The following message is displayed indicating the number of members in each set you selected to combine, the operation you selected, and the number of members in the combined set:

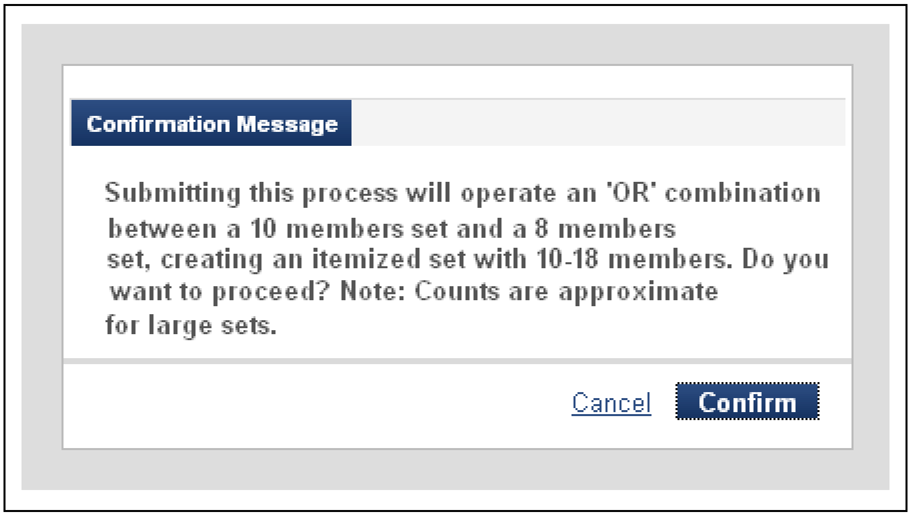


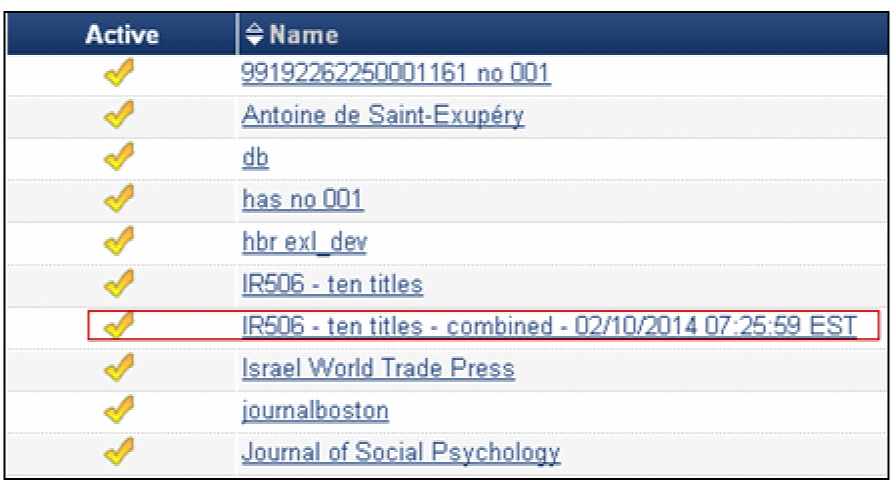
Figure 39 – Confirmation Message

Note: The confirmation message contains a range of members, since some members between the two sets may be identical and are therefore only included once in the combined set.

6 Click **Confirm**.

A job is run to combine the sets. The following message is displayed:

After the job finishes, the new set is added to the list of sets. (You must refresh the list to see the new set):



Active	Name
✓	99192262250001161 no 001
✓	Antoine de Saint-Exupéry
✓	db
✓	has no 001
✓	hbr exl_dev
✓	IR506 - ten titles
✓	IR506 - ten titles - combined - 02/10/2014 07:25:59 EST
✓	Israel World Trade Press
✓	journalboston
✓	Journal of Social Psychology

Figure 40 – Combined Set

Creating Sets from Imported Data

Description

The purpose of this enhancement is to allow you to import data from a text file or an Excel spreadsheet to create a set for any type of item. Until now, this functionality was available only for physical items and PO lines.

Technical Instructions

The following roles can access this enhancement:

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

To create sets from imported data:

1. On the Manage Sets page (**Resource Management > Search and Sets > Manage Sets**), select **Add Sets > Itemize**d. The Set Details page opens.
2. Select any option from the **Set content type** field and import the Excel file with the data.

The imported file must have the correct header at the top of the column for the data to be read. All other information in the Excel is disregarded. The following are the headers:

Content Type	Header
All Titles, Authorities	MMS ID
Physical titles, Electronic titles, Digital titles, Electronic packages, Digital files, Collections	PID
Physical items	Barcode and PID (PID, Item PID, or Item ID)
Electronic portfolios	PID (PID or Portfolio ID)
PO lines	PO line reference

The following file formats are accepted:

- Text files:
  - .txt
  - .csv
- Excel:
  - .xls
  - .xlsx

Notes:

- The import file can contain a maximum of 5000 lines and be a maximum size of 10 MB.
- Validation is performed only for PO lines and physical items. If you perform an import with invalid data, each invalid cell is ignored.
- If you import a file and then change the content type, you must re-import the file.

Improvements to the Delete Bibliographic Records Process

Description

Ex Libris made improvements to the Delete Bibliographical Records job:

- A parameter was added that allows libraries to retain records that would otherwise be deleted if they are related to other records that still exist in the system.
- A detailed report identifies, for libraries that exist within a collaborative network, the institutions associated with the retained records.

Technical Instructions

To run the job you must have one of the following roles:

- Inventory Operator (Digital, Electronic, or Physical)
- Cataloger
- Repository Manager

To run the job:

1 Select the **Delete Bibliographic Records** from the Run Job page (**Administration > Manage Jobs > Run a Job**). (Use the filter or search features to narrow your options.)

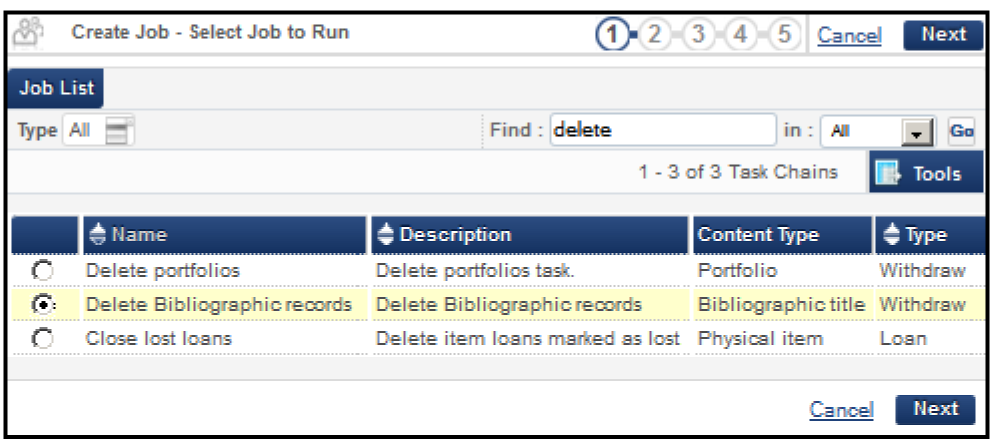


Figure 41 - Select the Job

2 Click **Next**.

Page two of the wizard opens.

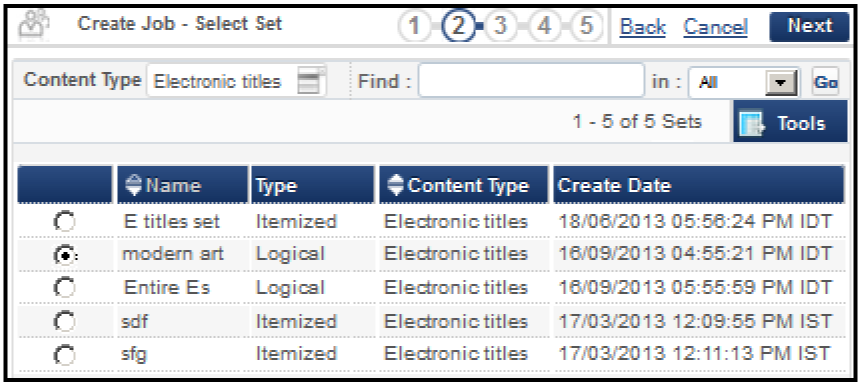


Figure 42 - Select Set for Job

3 Select the set on which you want to run the job and click **Next**.

Step three of the wizard, the new parameter for related records, opens.

Figure 43 - Related Records Parameter

4 Select the check box if you want records with related records in the system to be retained. If you want them to be deleted (which was the default, prior to the March release), leave the check box clear. Then click **Next**.

The scheduling page of the wizard opens.

5 Select a schedule from the drop-down options and click **Next**.

The Review page opens.

Figure 44 - Job Review and Confirm Page

6 Review your entries. If any are incorrect, use the **Back** button (as many times as necessary) to return to wizard pages and make corrections. If they are correct, click the **Submit** button.

The system saves and/or runs your job, depending on the scheduling you specified, and opens the Monitor Jobs page to the **Running** tab. Your job name, category, and other information (including status) appear in the table.

7 Click the **Refresh** button to see whether your job has changed status, or click the job name to go directly to the Job Report.

If you are a single institution, your report will resemble this Job Report page:

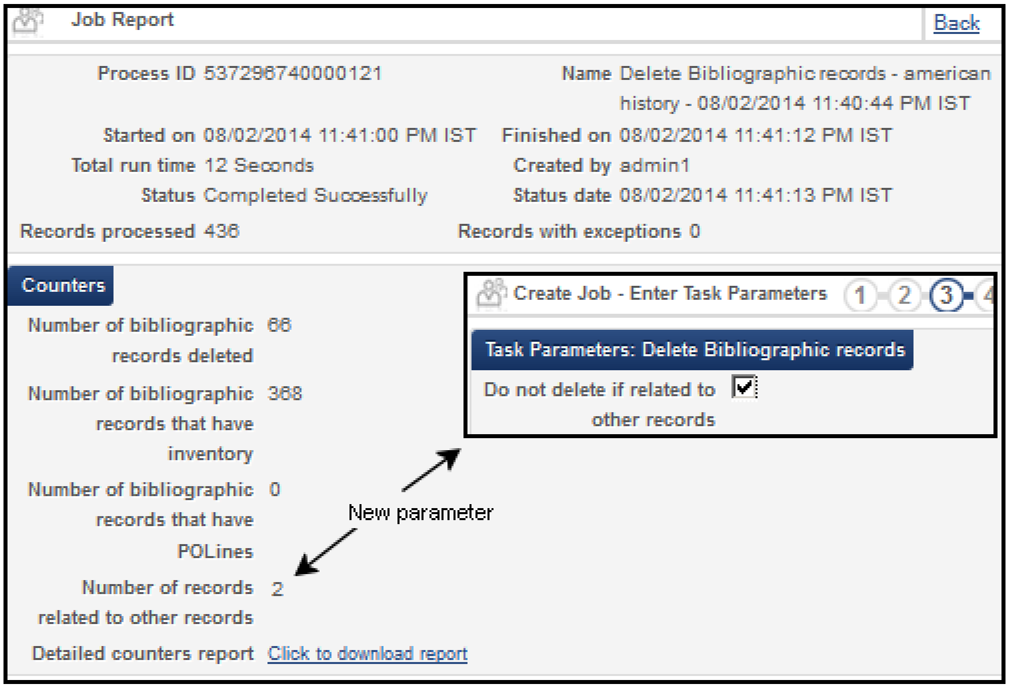


Figure 45 - Job Report for Individual Institution

If you are part of a collaborative network and running the job at the network level, your report will resemble this page, with the **Number of bibliographic records that are used by collaborative network members** field.

Figure 46 - Job Report for Network Zone

8 To view specific codes or identities of the job and its set, click the **Click to download report**. For a collaborative network, you can view the specific institutions that hold the related records. (See the Excel spreadsheet below.)

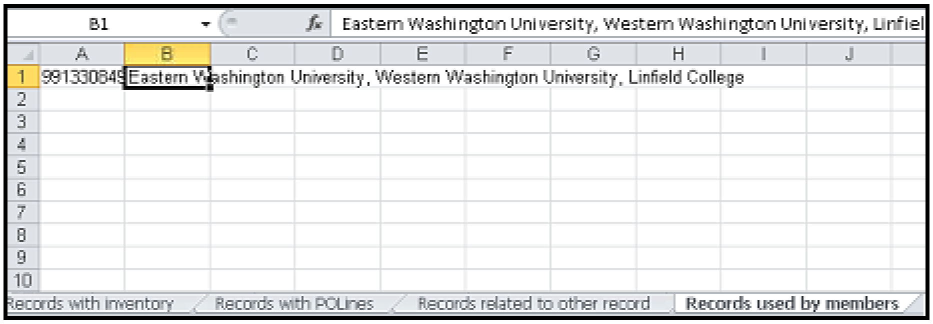


Figure 47 - Detailed Report of Institutions Retaining Linked Records

Adding 561a to MARC Holdings Record Profiles

Description

Note: This feature will not be fully manifest until a re-index is performed on your system. The next re-index for Alma systems is scheduled for April 2014.

The purpose of this enhancement is to support subfield *a* of field 561 of the MARC holdings profile. The subfield has been added as a searchable, auto-complete field related to Ownership and Custodial History, with validation and normalization services. The subfield has been added to the profile but will not have auto-complete functionality on all data until the next re-index (see note above).

Technical Instructions

All Alma users can search this subfield.

For instructions on searching and editing metadata records, refer to the *Alma Resource Management Guide* or the Online Help.

Normalization Rule Improvements

Description

Two normalization features have been added to the system:

- The Create System Number rule solves problems with import matching and merging by providing a normalization rule to create a field composed of two existing MARC fields that exist in the customer's records but do not have a match in Alma.
- Allowing viewing and editing of shared normalization rules allows more than one user (with permissions) to work with a rule, edit it for their institution, and apply it.

Technical Instructions

The following roles can access these features:

- Cataloger
- Catalog Manager

Create System Number

This rule allows a user to add a new field comprised of two existing fields in the customer's records.

It does the following:

Gets value from tag 001 + value from tag 003 and creates new tag 035

Example:

- 001: bk_99934
- 003: EBL

  should create:

- 035: (EBL) bk_99934

Using and Editing Shared Normalization Rules

The March release of Alma allows increased flexibility in the use of shared normalization rules:

- They can be opened by more than one user concurrently.
- A rule can be edited and saved by any user even if it is open by another user.

For example, if a rule is being updated in the MD Editor by more than one user, when one of these users clicks the **Save** button, the following confirmation box opens:

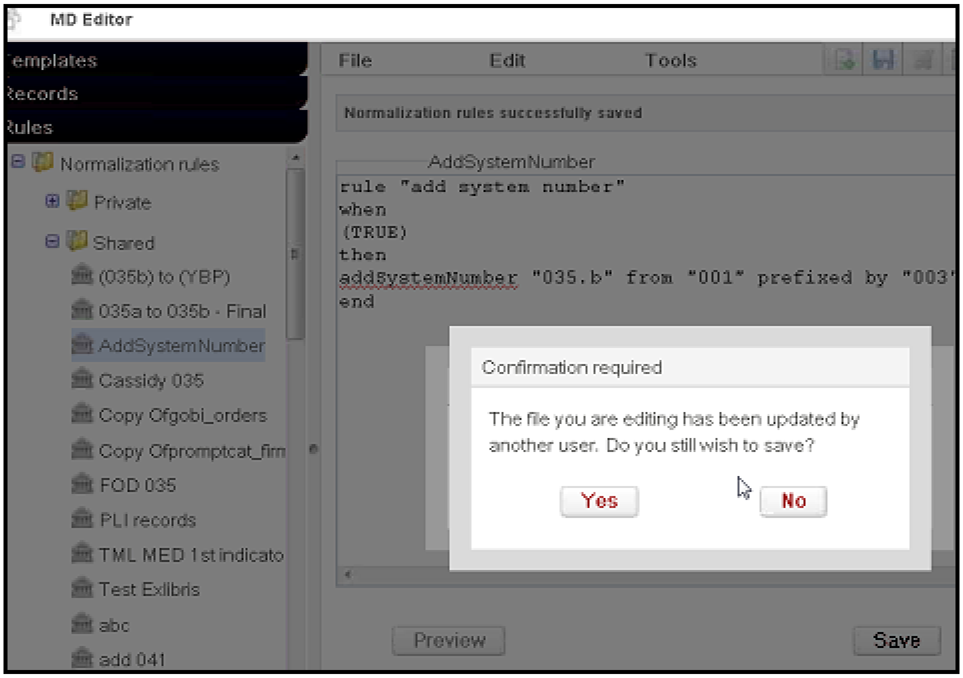


Figure 48 - Confirmation to Override Another User's Changes

Click **Yes** to override the other user's changes and save your own to the rule. To leave the rule as is—or as the other user has left it after changing it—click **No**.

SuDoc Call Number Parsing Routines

Description

Ex Libris added two call number parsing routines for the Superintendent of Documentation (SuDoc) classification system. In the list of existing parsing routines, they are numbers 9 and 10.

Parsing Routine 9

This parsing routine is used primarily for portrait-oriented spine labels. It does the following:

a. Inserts a line break after the first colon

b. Replaces each slash following the colon (not before the colon) with a line break.

Parsing Routine 10

This parsing routine is used primarily for landscape-oriented spine labels. It inserts a line break after the first colon.

Example 1: HE 20.6520/2: AC9/2

Parsing Routine 9:

```
<parsed_call_number>
<call_no_1>HE 20.6520/2:</call_no_1>
<call_no_2> AC9</call_no_2>
<call_no_3>2</call_no_3>
</parsed_call_number>
```

Parsing Routine 10:

```
<parsed_call_number>
<call_no_1>HE 20.6520/2:</call_no_1>
<call_no_2> AC9/2</call_no_2>
</parsed_call_number>
```

Example 2: HE 20.6520/2: 17

Parsing Routine 9:

```
<parsed_call_number>
<call_no_1>HE 20.6520/2:</call_no_1>
<call_no_2> 17</call_no_2>
</parsed_call_number>
```

Parsing Routine 10:

```
<parsed_call_number>
<call_no_1>HE 20.6520/2:</call_no_1>
<call_no_2> 17</call_no_2>
</parsed_call_number>
```

Technical Instructions

The following roles can access the configuration for call number parsing:

- Cataloging Administrator
- General System Administrator

To select a new parsing option for SuDoc call numbers:

1. On the Configuration Page (**Resource Management > Resource Configuration > Configuration Menu**), click **Call Number Parsing** under **General**.
2. View the drop-down list of options for **Call number parsing type**.

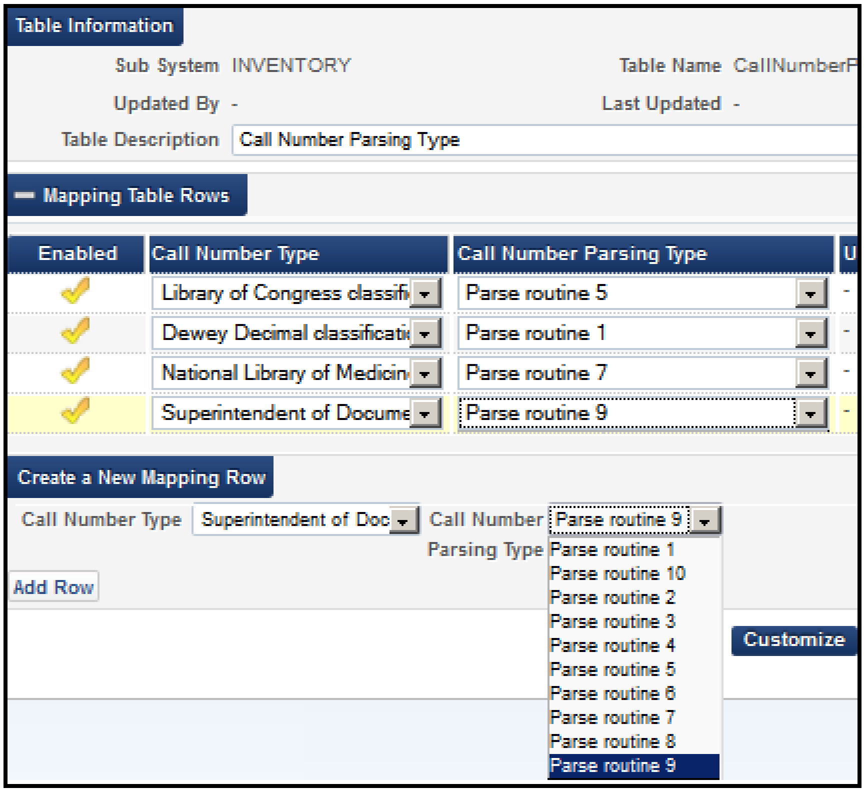


Figure 49 - New Parsing Routines

3. Select a call number type and a call number parsing type from their respective drop-down lists and click **Add Row**.
4. Click **Customize**.

Item Material Type Customization

Description

The purpose of this enhancement is to allow you to customize the physical item material type descriptions.

Technical Instructions

The following roles can access this enhancement:

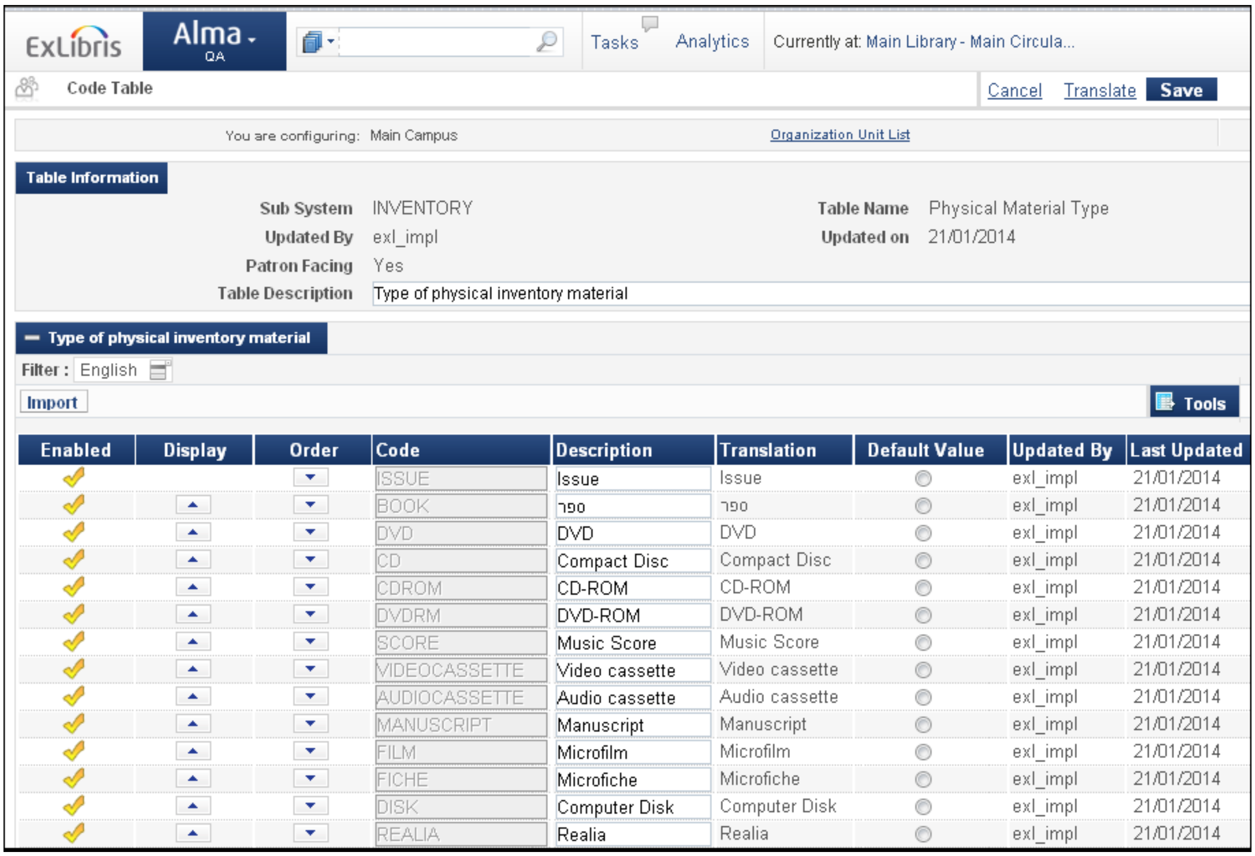
- Cataloging Administrator
- General System Administrator

To customize the physical item material type descriptions:

1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click the new link **Physical Material Type Descriptions** under **General**.

Figure 50 – Physical Material Type Descriptions

The code table of the Physical Material Type opens:



Enabled	Display	Order	Code	Description	Translation	Default Value	Updated By	Last Updated
			ISSUE	Issue	Issue		exl_impl	21/01/2014
			BOOK	ספר	ספר		exl_impl	21/01/2014
			DVD	DVD	DVD		exl_impl	21/01/2014
			CD	Compact Disc	Compact Disc		exl_impl	21/01/2014
			CDROM	CD-ROM	CD-ROM		exl_impl	21/01/2014
			DVDRM	DVD-ROM	DVD-ROM		exl_impl	21/01/2014
			SCORE	Music Score	Music Score		exl_impl	21/01/2014
			VIDEOCASSETTE	Video cassette	Video cassette		exl_impl	21/01/2014
			AUDIOCASSETTE	Audio cassette	Audio cassette		exl_impl	21/01/2014
			MANUSCRIPT	Manuscript	Manuscript		exl_impl	21/01/2014
			FILM	Microfilm	Microfilm		exl_impl	21/01/2014
			FICHE	Microfiche	Microfiche		exl_impl	21/01/2014
			DISK	Computer Disk	Computer Disk		exl_impl	21/01/2014
			REALIA	Realia	Realia		exl_impl	21/01/2014

Figure 51 – Code Table

2 Edit the descriptions of the material types in the **Description** field.

3 To disable a material type, click the yellow check mark to the left of the material type that you want to disable. The check mark becomes gray.

4 Use the up and down arrows to change the order in which the material type is displayed in Alma.

5 Click **Save**.

The changes appear in all the **Material type** drop-down lists in Alma—for example, in the Physical Item Editor when editing a physical item. In addition, the change to the material type description appears in the Primo View It and Get It tabs.

Other Resource Management Enhancements

- A new check box, **Suppress from Discovery**, was added to the Quick Cataloging page. If you select this check box, the associated bibliographic record will be suppressed from discovery.
- MARC subfields k, m, and n of 041 tag (language) are now supported in Alma.

Fulfillment

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

Configuring Hold Request Limits

The purpose of this enhancement is to enable configuring the maximum number of digital and physical hold requests allowed for patrons of specific user groups. Once the patron's limit is reached, a block is invoked and no further hold requests can be placed for that user. Blocks on hold requests can be overridden.

Technical Instructions

The following roles can configure this functionality:

- General System Administrator
- Fulfillment Administrator

To configure hold request limits for patrons:

1 On the PatronLimits Mapping Table (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configurations > Patron Limits**), locate the **Max. digitization requests** and **Max. physical item requests** columns.

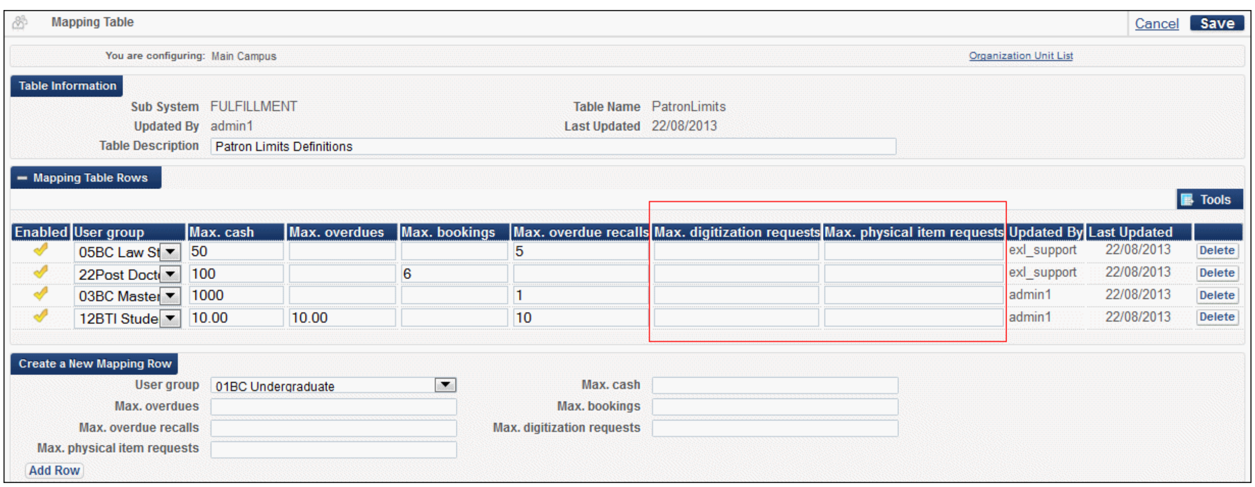


Figure 52 – PatronLimits Mapping Table Page — New Columns

2 In the **Max digitization requests** column, enter the maximum number of digitization requests allowed for patrons in the specified user group.

3 In the **Max physical item requests** column, enter the maximum number of physical item hold requests allowed for patrons in the specified user group.

4 Click **Save**.

Fulfillment Configuration Utilities

Description

The purpose of this enhancement is to enable viewing fulfillment configuration information for a specific item. The utility displays the information that would take effect if a specified item were loaned to a specified patron, as follows:

- The Fulfillment Unit Name, Fulfillment Unit Rule, and TOU associated with the item.
- The due date calculated by the system if the specified item would be loaned to the indicated patron.
- The overdue fine for an item returned after its due date.

You can also access this information when viewing a patron’s loan information on the Patron Services page.

Technical Instructions

The following roles can access this functionality:

- Fulfillment Services Manager
- Fulfillment Administrator
- User Manager
- Circulation Desk Operator
- Circulation Desk Manager

Additionally, you can contact Ex Libris Support to enable the following roles to access this functionality:

- Circulation Desk Operator Limited
- Fulfillment Services Operator

To access the fulfillment configuration utility:

1 Open the Fulfillment Configuration Utility page (**Fulfillment > Advanced Tools > Fulfillment Configuration Utility**).

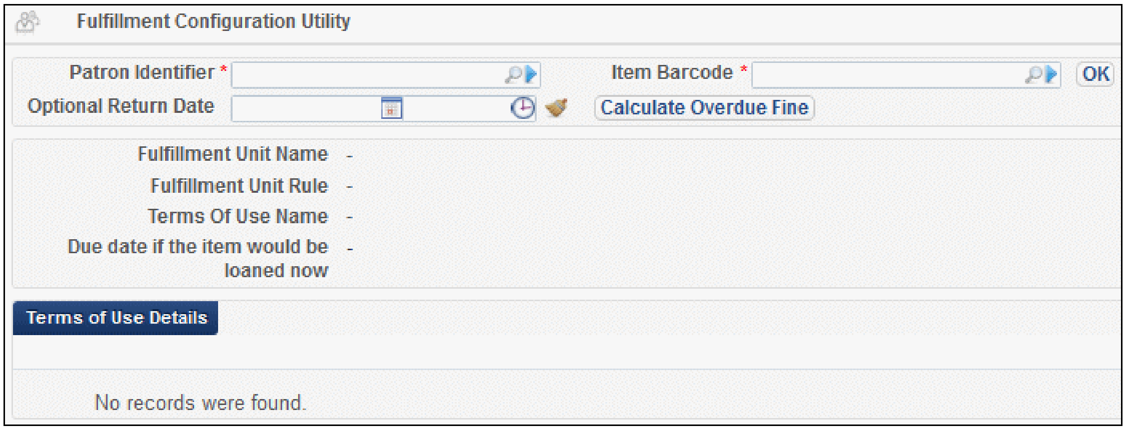
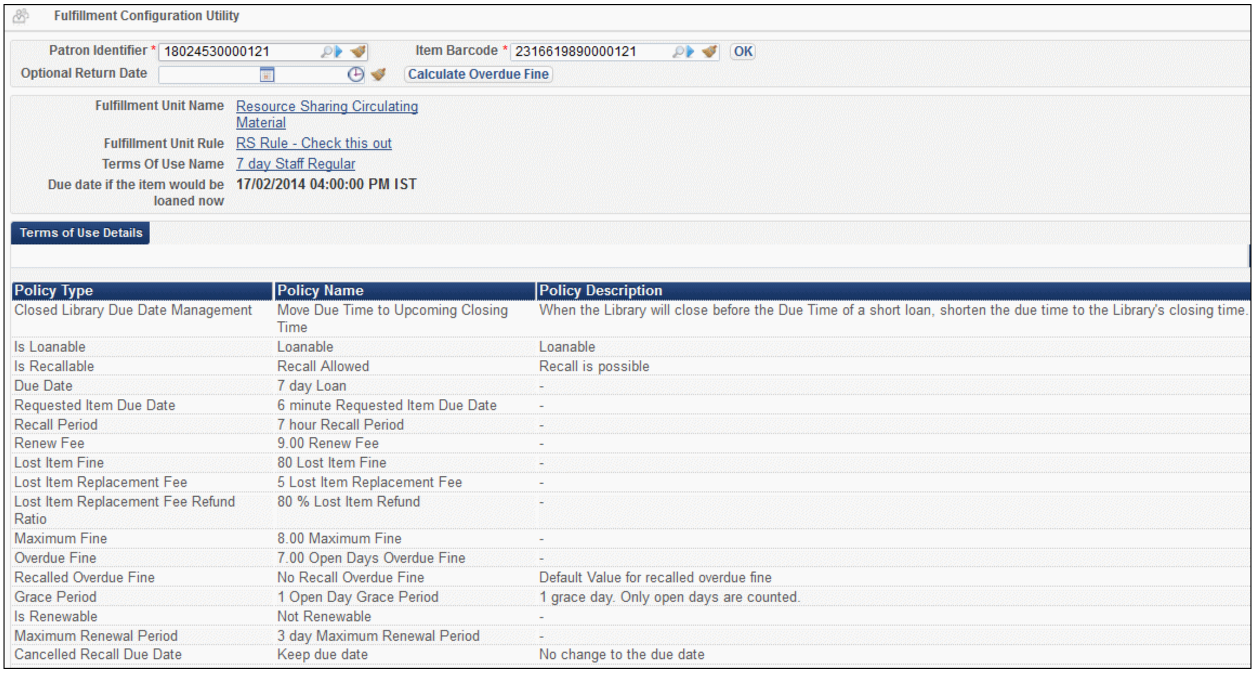


Figure 53 – Fulfillment Configuration Utility Page

Note: If accessing this utility from a patron's loan list, the borrower's id displays in the **Patron identifier** field, and the item's due date displays in the list above the **Terms of Use Details** section.

---

2. In the **Patron identifier** field, search for a patron. After selecting a patron, the patron's ID displays in this field.
3. In the **Item barcode** field, search for an item. After selecting an item, the item's barcode displays in this field.
4. Click **OK**. The due date for the specified item and patron displays in the **Due date if the item would be loaned now** field, and the Terms of Use for the item and patron displays on the bottom of the page.



Policy Type	Policy Name	Policy Description
Closed Library Due Date Management	Move Due Time to Upcoming Closing Time	When the Library will close before the Due Time of a short loan, shorten the due time to the Library's closing time.
Is Loanable	Loanable	Loanable
Is Recallable	Recall Allowed	Recall is possible
Due Date	7 day Loan	-
Requested Item Due Date	6 minute Requested Item Due Date	-
Recall Period	7 hour Recall Period	-
Renew Fee	9.00 Renew Fee	-
Lost Item Fine	80 Lost Item Fine	-
Lost Item Replacement Fee	5 Lost Item Replacement Fee	-
Lost Item Replacement Fee Refund Ratio	80 % Lost Item Refund	-
Maximum Fine	8.00 Maximum Fine	-
Overdue Fine	7.00 Open Days Overdue Fine	-
Recalled Overdue Fine	No Recall Overdue Fine	Default Value for recalled overdue fine
Grace Period	1 Open Day Grace Period	1 grace day. Only open days are counted.
Is Renewable	Not Renewable	-
Maximum Renewal Period	3 day Maximum Renewal Period	-
Cancelled Recall Due Date	Keep due date	No change to the due date

Figure 54 – Fulfillment Configuration Utility Page — Terms of Use

5. In the **Optional Return Date** field, enter a date and time to return the item and click **Calculate Overdue Fine**. The **Overdue fine for given return date** displays, indicating the fine that would be accrued if the item were returned on the indicated date and time.

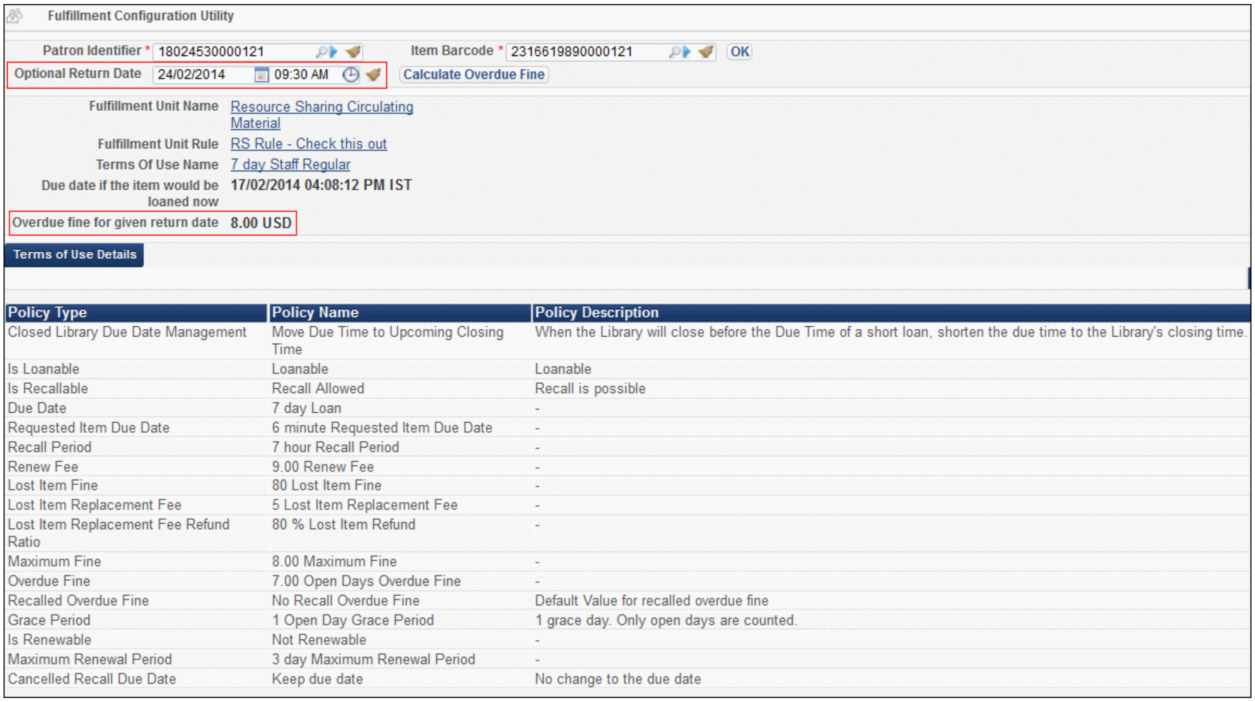


Figure 55 – Fulfillment Configuration Utility Page — Overdue fine for given return date

6 You can perform the following actions for the item:

a Click the link next to **Fulfillment Unit Name** to view and edit the item's fulfillment unit.

b Click the link next to **Fulfillment Unit Rule** to view and edit the item's fulfillment unit rule.

c Click the link next to **Terms of Use Name** to view and edit the item's TOU.

To access fulfillment configuration information via the Patron Services page:

1 On the Patron Identification page (**Fulfillment > Checkout/Checkin > Manage Patron Services**), search for a patron in the **Scan patron's ID or search for patron** field and click **Go**. The Patron Services page displays.

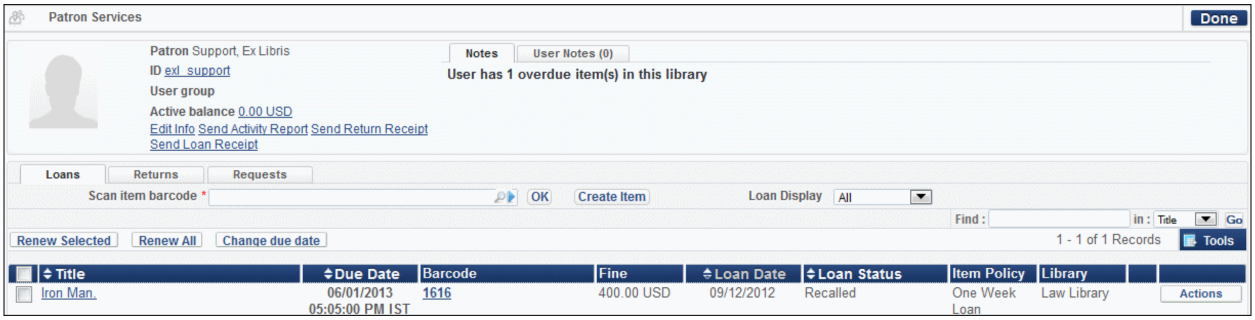


Figure 56 – Patron Services Page

2 In the **Loans** tab, select **Actions > View Policies** for a loan record. The Fulfillment Configuration Utility page displays for the item and patron.

Figure 57 – Fulfillment Configuration Utility Page

Resource Sharing

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

Send Query to Patron Option Includes Preset Content in Email

Description

The purpose of this enhancement is to include preset content in the body of the email that is sent to patrons when selecting the **Send Query to Patron** option on the Resource Sharing Borrowing Requests page. The content can be modified, as needed.

Technical Instructions

The following roles can access this functionality:

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

To send an email with preset content via the Send Query to Patron option:

1. On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Send Query to Patron**. The **E-mail Message** dialog box opens.

Figure 58 – E-mail Message Dialog Box

The number in the **Subject** field represents the External Identifier of the request, if one exists.

By default, the **From** field displays the address **DoNotReply@<preferred–email-domain>**, to ensure that the email is not sent to the patron's spam/junk folder. To reply to this email, the patron can access the sender's email address from signature portion of the email, at the bottom of the message in the **Body** field.

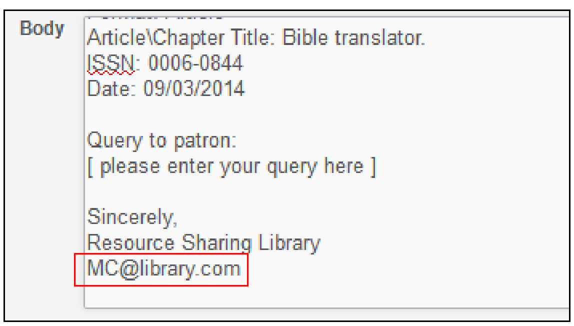


Figure 59 – Email Address in Body Field of E-mail Message Dialog Box

2 In the **To** field, enter the recipient's email address. This field is populated automatically if the patron has a preferred email address.

3 The **Body** field contains text relating to the requested resource. You can update the text in this field, as needed. Enter the text for the patron by replacing the string **[please enter your query here]** under **Query to patron:**.

4 Click **Send E-mail**.

Adjusting the Due Date for Physically Received Material

Description

The purpose of this enhancement is to enable automatically adjusting the due date for a resource sharing request loan. The due date is set based on the due date set by the resource lender, and the lending partner's defined delivery delay.

These values are configured on the resource sharing partner level — when configuring a partner, you add a delivery delay value which automatically adjusts the item due date to account for the fact that item delivery takes a specified amount of days.

Items whose due date is before the item is scheduled to arrive cannot be loaned and receive a special status.

Technical Instructions

The following roles can access this functionality:

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

To adjust the resource sharing due date:

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

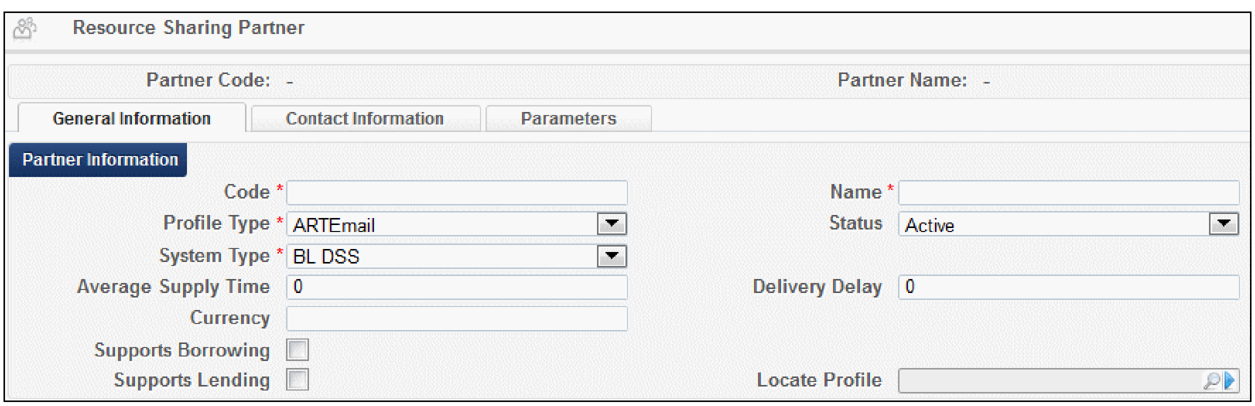


Figure 60 – Resource Sharing Partner Page

2. In the **Code** field, enter a code for the partner.
3. In the **Name** field, enter a name for the partner.

4 In the **Delivery Delay** field, enter the number of days needed for delivery of the item.

5 Modify any other information, as needed.

6 Click **Save**. The Resource Sharing partner displays on the Resource Sharing Partner List page.

The due date that is calculated when the received item is loaned to the requesting patron is automatically advanced by the number of days indicated in the **Delivery Delay** field, as described at the end of the following procedure.

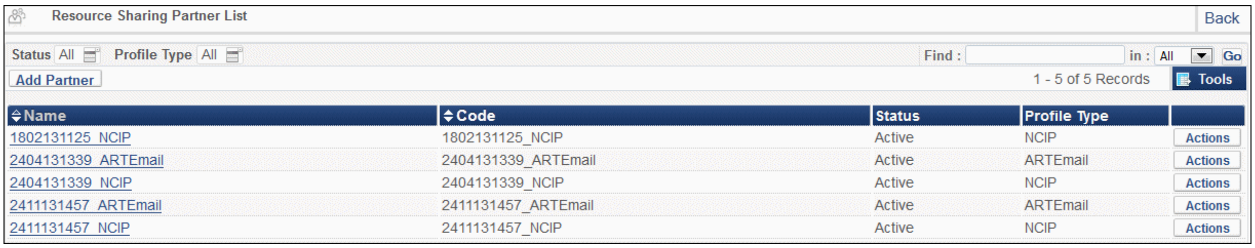


Figure 61 – Resource Sharing Partner List Page

To view an item's due date based on the Delivery Delay value:

1 On the Received Items page (**Fulfillment > Resource Sharing > Receiving Items**), enter a value in the **External Identifier** field and click **OK**.

2 Enter a due date in the **Due Date** field, as required by the lender.

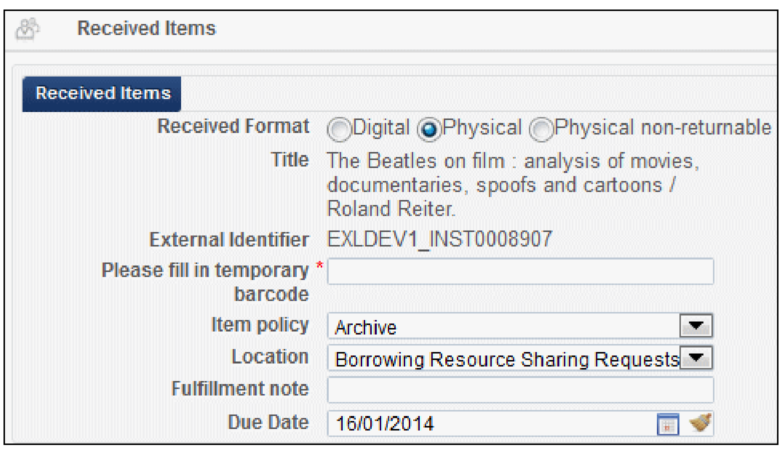


Figure 62 – Received Items Page

3 Open the Patron Services page (**Fulfillment > Checkout/Check-in > Manage Patron Services**, search for a patron and click **Go**).

4 On the **Loans** tab, locate an item for loan. The due date reflects the item's due date at the time of receiving the item, minus the configured Delivery Delay value on the Resource Sharing Partner page.

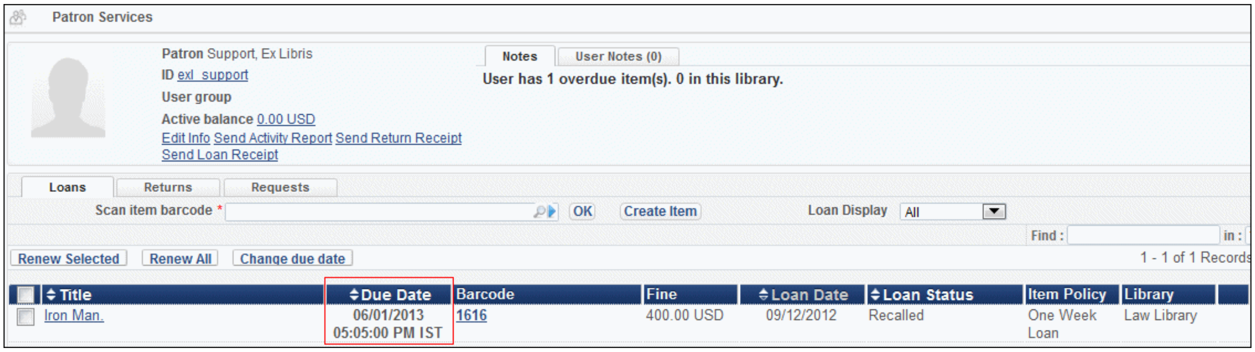


Figure 63 – Patron Services Page – Due Date

For example, if the due date when receiving the item is June 5, 2013 and Delivery Delay = 4, The **Due Date** displays on the Patron Services page as June 1, 2013, to allow 4 days for item delivery and ensure that the item arrives by its ‘actual’ due date of June 5.

To handle a non-deliverable item and enable it for delivery:

On the Received Items page, if a due date is entered for either a past date or a date by which the item cannot be delivered, a message displays indicating the item cannot be loaned:

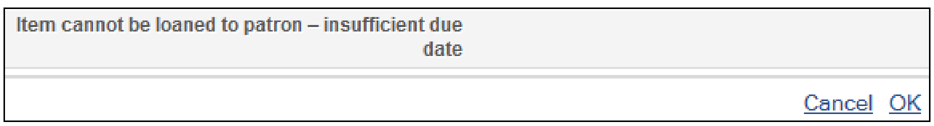


Figure 64 – Insufficient Due Date Message

Do one of the following:

- Click **Cancel** to return to the Received Items page and modify the due date. When you fix the due date, the item displays on the Resource Sharing Borrowing Requests page with the status **Physically Received by Library**.

Figure 65 – Physically received by library status

- Click **OK** to retain the insufficient due date. The item displays on the Resource Sharing Borrowing Requests page with the status **Received — not for loan**, indicating that the item has been received by the Resource Sharing Borrowing Library, but cannot be loaned.

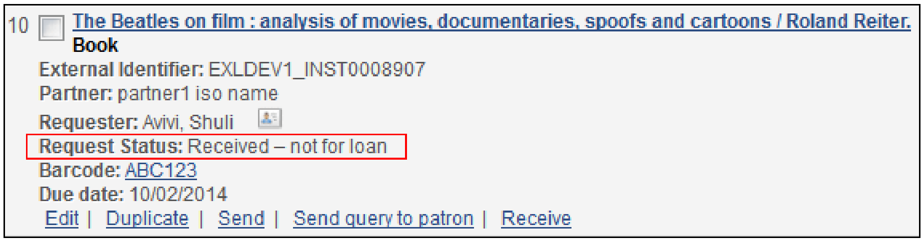


Figure 66 – Received – not for loan status

Non-Returnable Resource Sharing Requests

Description

The purpose of this enhancement is to enable marking a physical resource sharing request as non-returnable. Items transferred in non-returnable requests are kept by the patron and must be picked up at the resource sharing library.

Technical Instructions

The following roles can access this functionality:

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

To create a non-returnable resource sharing request:

1. Add a resource sharing borrowing request for a book or article on the Resource Sharing Borrowing Request page (**Fulfillment > Resource Sharing > Borrowing Requests**, select **Add > Manually** and choose **Book** or **Article**).
2. In the Request Attribute section, locate the **Requested Format** field and select **Physical non-returnable**.

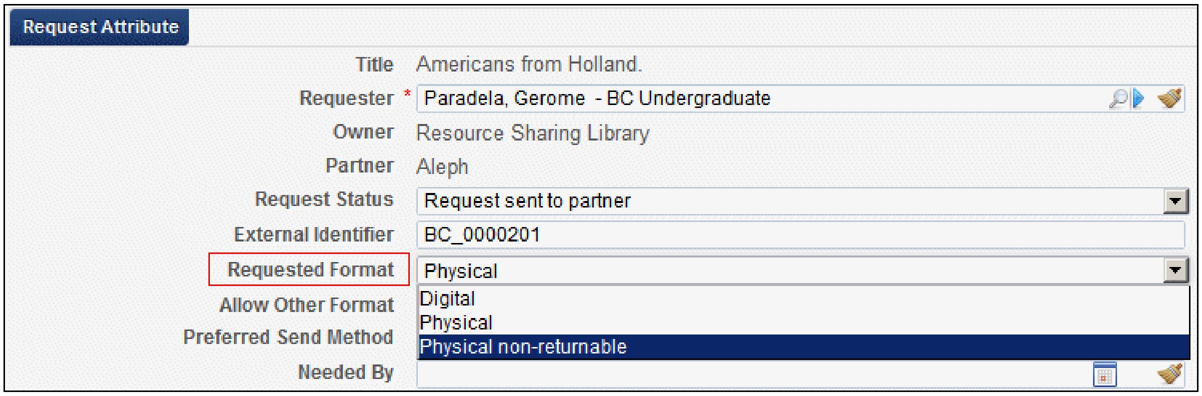


Figure 67 – Requested format – Physical non-returnable option

Note that when the **Physical non-returnable** option is selected for a borrowing request, the lending request's format is **Physical non-returnable** and the Resource Sharing Lending Requests Task List page displays the **Ship non-returnable** option (**Fulfillment > Resource Sharing > Lending Requests**).

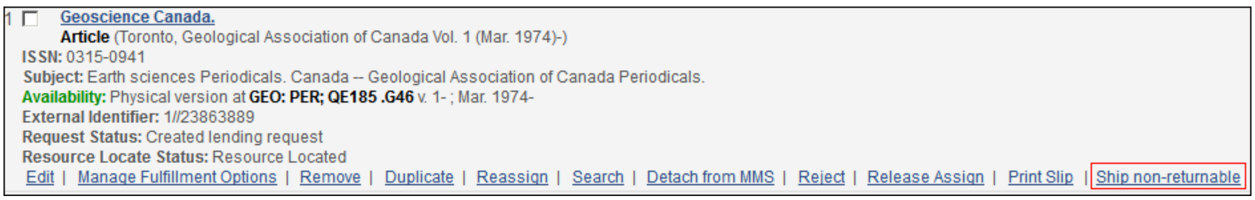


Figure 68 – Lending Request – Ship non-returnable option

Clicking this option ships the request to the borrowing library as a non-returnable copy, with the status **Shipped Physically**.

3 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Receive** to receive an item. The Received Items page opens, containing the **Physical non-returnable** option.

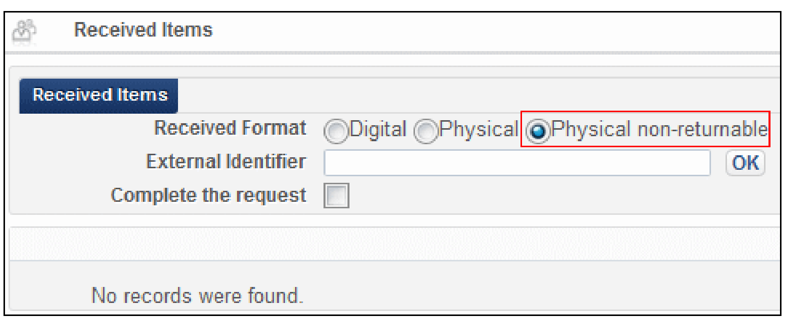


Figure 69 – Received Items Page – Physical non-returnable option

4 For the **Received Format** value, ensure that **Physical non-returnable** is selected.

5 In the **External Identifier** field, enter an external identifier and click **OK**. The item displays in a table on the page.

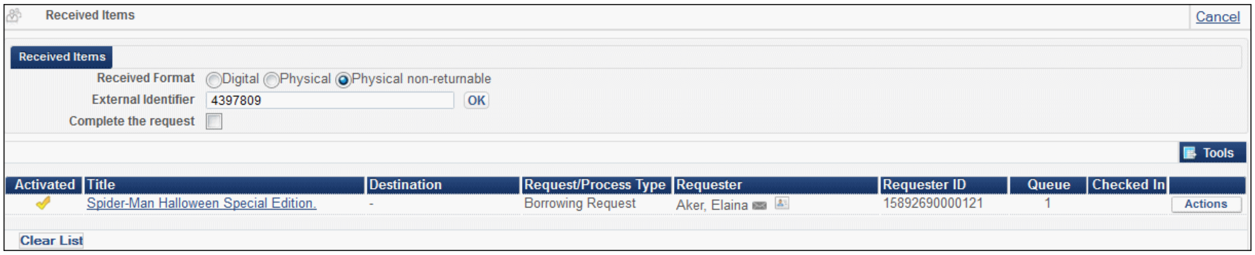


Figure 70 – Received Items Page – Physical non-returnable option

If you selected **Complete the request**, the item's status becomes **Request Completed** and the request is marked as closed. If you do not select this option, the resource's status is listed on the Resource Sharing Borrowing Requests page as **Physically received by library**.

New Parameters Enabled When Receiving a Resource Sharing Borrowing Request

Description

The purpose of this enhancement is to provide new parameters for specifying information on an item when receiving a resource sharing borrowing request.

Technical Instructions

The following roles can access this functionality:

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

To access new parameters when receiving a resource sharing borrowing request:

1 Open the Received Items page (**Fulfillment > Resource Sharing > Receiving Items**).

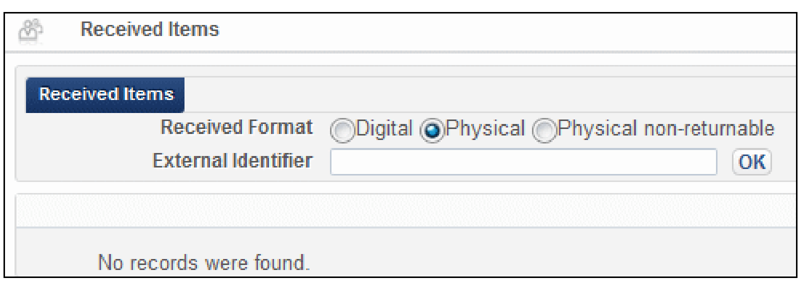


Figure 71 – Received Items Page

2 In the **External Identifier** field, enter the external identifier for the item you want to receive.

3 Click **OK**. The dialog box for the item opens.

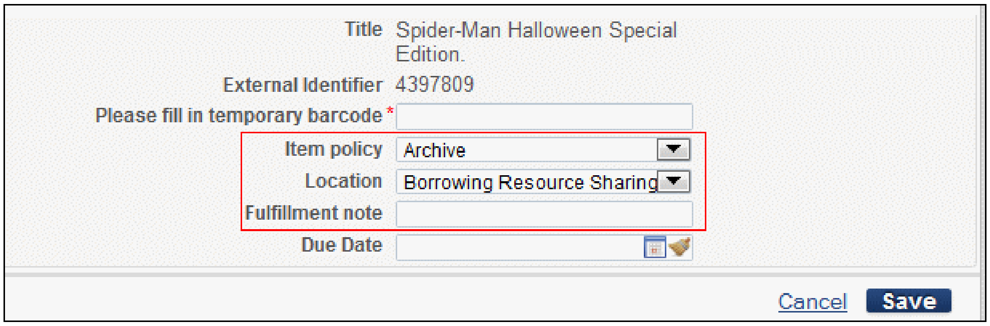


Figure 72 – Received Item Dialog Box — New Fields

4 The indicated fields have been added to this dialog box:

- **Item policy**
- **Location**
- **Fulfillment note**

These fields are populated with the values of the Temporary Item Creation Rule for the item. If no rule is configured, the **Item Policy** field is empty and the **Location** field contains the current location of the item, based on the library and institution default settings. The **Fulfillment note** field is a free text field and is empty by default.

Fields in this dialog box can be modified, as needed.

Note: These fields are also displayed on the Received Items page when clicking **Receive** on the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**).

Other Resource Sharing Enhancements

- It is now possible to determine whether to disable services for an NCIP partner in the Get It tab. For this purpose, the **Disable service** parameter was added to resource sharing NCIP partners **Parameters** tab (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Partners**, for NCIP partners).

  The options for this parameter are:

  - Never
  - When resource is self-owned by library
  - When resource is self-owned by library and is available

  A resource is self-owned by the library when there are physical items for it.

  A resource is available when it is in place and in an open location.

- The **Save and Send** action was previously in the Execute drop-down list. It is now a separate button.

Administration

The following section describes the functions provided for the Administration component in the March 2014 release of Alma.

Call Number Added to Interested In Letter

Description

The purpose of this enhancement is to add the call number to the Interested In letter. The Interested In letter is sent to patrons that are listed in the PO line Interested Users tab as interested in an item that the library does not yet own. When the item arrives at the library, the patron is notified by the Interested In letter. Until now, the letter did not contain the call number of the item. Now, the Interested In letter contains the call number, which allows the patron to retrieve the item from the library shelves.

Technical Instructions

The addition of the call number to the Interested In letter does not occur automatically for customers who have customized the letter. Customers who have customized the letter must configure the letter manually for the call number of the item to appear in the letter.

To configure the Interested In letter to display the call number of the item:

1. On the Configuration Files page (**Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**) click **Customize** for the Interested In letter. The Configuration File page opens
2. Add the following to the content of the letter:

```
<br />

<xsl:value-of  select="notification_data/poline_inventory/call_number"/>

<br />
```

3. Click **Customize**.

Analytics

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

Support for COUNTER Release 4 JR1

The purpose of this enhancement is to provide support for the load of COUNTER Release 4 usage statistics.

As part of the March release, we have added the ability to load COUNTER 4 JR1 data. You can upload COUNTER Release 4 usage files into UStat manually and/or via SUSHI, and data will be imported into Alma. Although it is no longer officially COUNTER compliant, Ex Libris continues to support files provided in COUNTER Release 3 format.

Note that new data elements introduced in COUNTER Release 4 (for example, Journal DOI), as well as the addition of missing reports (such as Book Report 1 and newly added Journal Report 5), are not available as part of this release but are part of the Ex Libris roadmap.

Note: In the past, some vendors adopted the COUNTER code of practice with variations that were inconsistent with the standard. Thus, if you encounter any issues in loading COUNTER Release 4 files, please contact Ex Libris Support for assistance.

In addition to the above, the following five new SUSHI vendors were added to UStat:

- American Public Health Association
- INFORMS
- Future Science
- Future Medicine
- Society of Exploration Geophysicists

For details on all of the above changes and the procedure that you must perform in order to harvest the COUNTER Release 4 usage files, refer to the *UStat User's Guide*, located under **UStat > Product Documentation** in the Documentation Center.

Primo

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

Display License Information in the View It Tab

This enhancement allows customers to display an online resource's license information in the View It tab. The displayed terms of the license are configurable in Alma, as well as the license-related labels that display in the View It tab.

Figure 73 – Show License Link in View It Tab

After the user clicks the **Show license** link, the name of the link changes to **Hide license**, and the license information appears as configured in Alma:

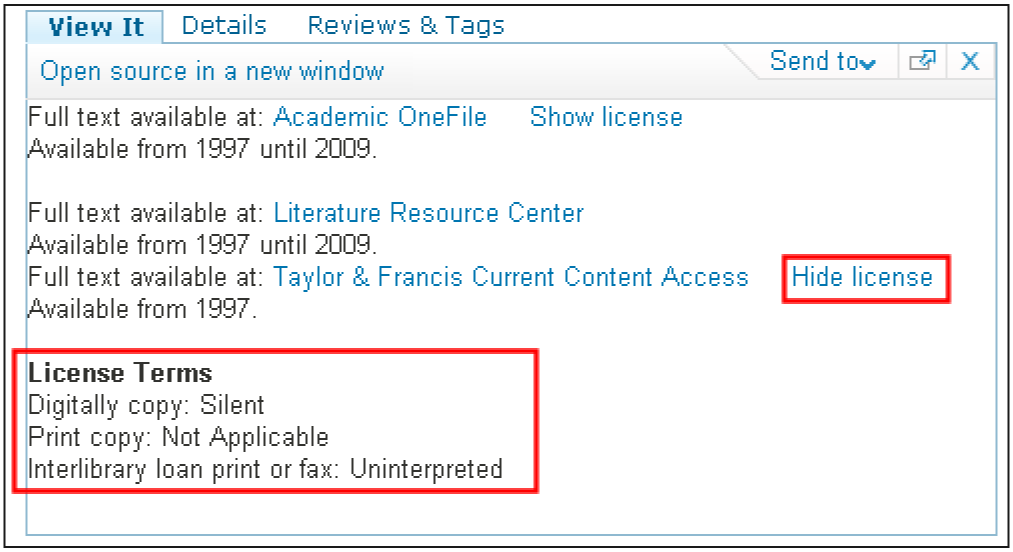


Figure 74 – License Terms Displayed in View It Tab

Technical Instructions

The following roles are necessary to configure this enhancement:

- Acquisitions Administrator
- Fulfillment Administrator
- General System Administrator

To enable the display of license terms in the View It tab:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Other Settings** under **Discovery Interface Display Logic**. The Other Settings page opens.

Figure 75 – Other Settings under Discovery Interface

2 Select the **Enable display of license information** check box.

3 Click **Save**.

To configure which license terms are displayed in the View It tab:

1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu**), click **Terms Type** under **Licenses.** The LicenseTermsType mapping table page opens.

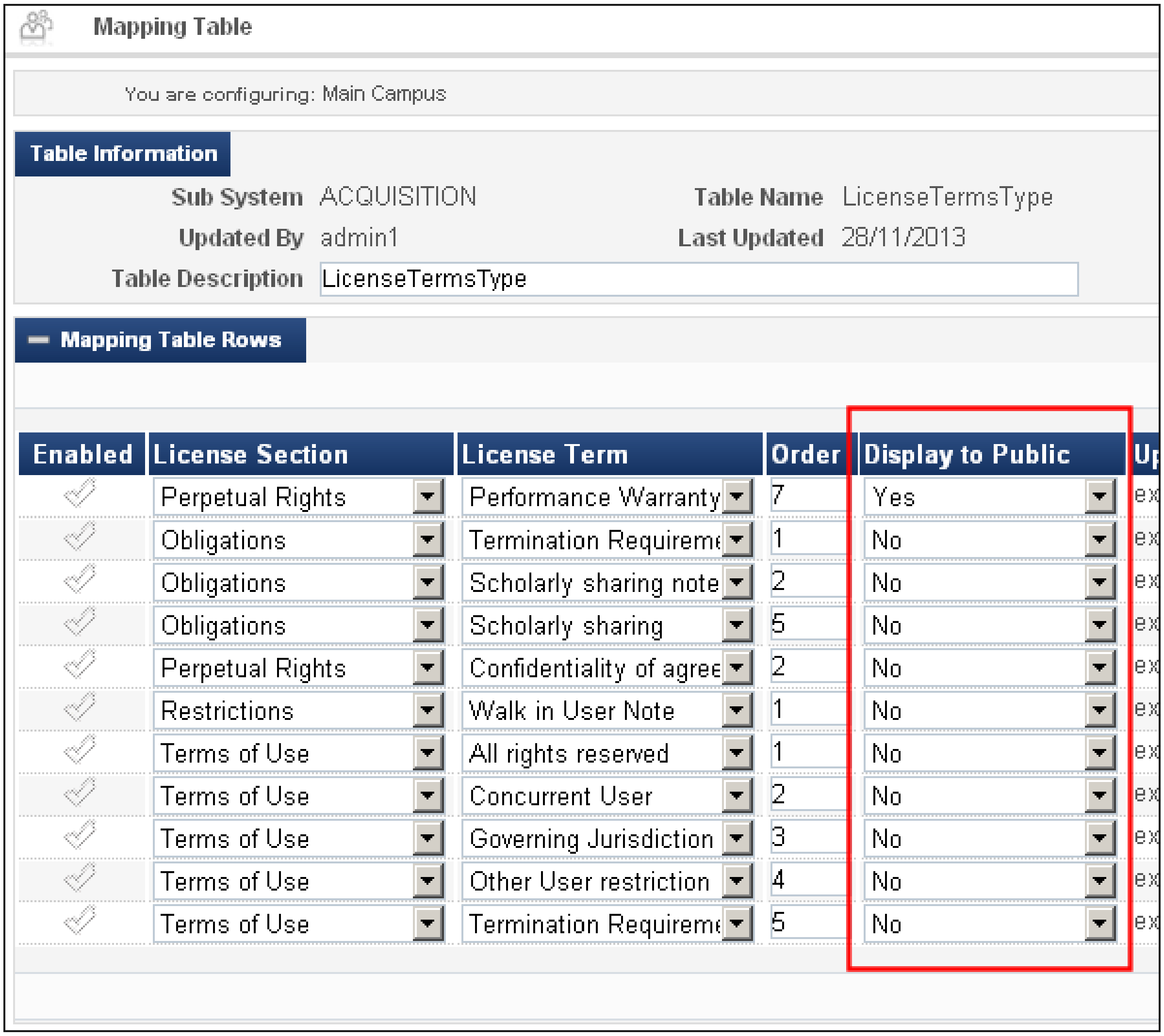


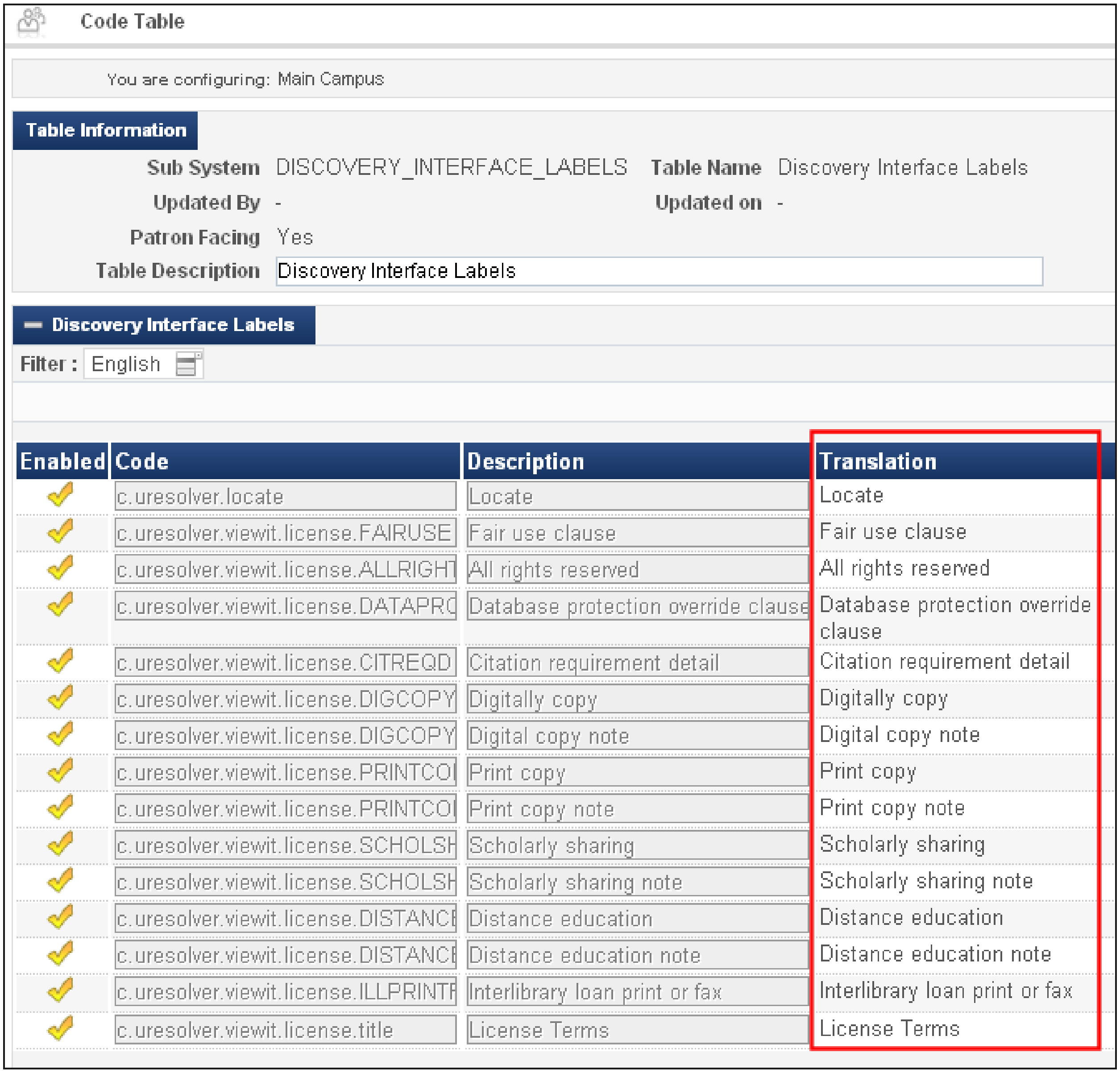
Figure 76 – LicenseTermsType Mapping Table

2 For each term in the list, select **Yes** from the **Display to Public** drop-down list to display it in the View It tab.

3 Click **Save**.

To modify the labels that the View It tab displays for the license terms:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under **Discovery Interface Display Logic.** The Discovery Interface Labels code table page opens.


Code Table

You are configuring: Main Campus

Table Information

Sub System DISCOVERY_INTERFACE_LABELS Table Name Discovery Interface Labels

Updated By - Updated on -

Patron Facing Yes

Table Description Discovery Interface Labels

Discovery Interface Labels

Filter : English

Enabled	Code	Description	Translation
✓	c.uresolver.locate	Locate	Locate
✓	c.uresolver.viewit.license.FAIRUSE	Fair use clause	Fair use clause
✓	c.uresolver.viewit.license.ALLRIGHT	All rights reserved	All rights reserved
✓	c.uresolver.viewit.license.DATAPRC	Database protection override clause	Database protection override clause
✓	c.uresolver.viewit.license.CITREQD	Citation requirement detail	Citation requirement detail
✓	c.uresolver.viewit.license.DIGCOPY	Digitally copy	Digitally copy
✓	c.uresolver.viewit.license.DIGCOPY	Digital copy note	Digital copy note
✓	c.uresolver.viewit.license.PRINTCOI	Print copy	Print copy
✓	c.uresolver.viewit.license.PRINTCOI	Print copy note	Print copy note
✓	c.uresolver.viewit.license.SCHOLSH	Scholarly sharing	Scholarly sharing
✓	c.uresolver.viewit.license.SCHOLSH	Scholarly sharing note	Scholarly sharing note
✓	c.uresolver.viewit.license.DISTANCI	Distance education	Distance education
✓	c.uresolver.viewit.license.DISTANCI	Distance education note	Distance education note
✓	c.uresolver.viewit.license.ILLPRINTI	Interlibrary loan print or fax	Interlibrary loan print or fax
✓	c.uresolver.viewit.license.title	License Terms	License Terms

Figure 77 – Discovery Interface Labels Code Table

2 Click **Customize** in the row that contains the label that you want to modify.

3 Modify the text in the **Translation** field.

4 Click the **Customize** button that is either above or below the list of code table rows.

Collaborative Networks

The following section describes Alma enhancements provided for collaborative networks in the March 2014 release.

Central Publishing to Primo Improvements

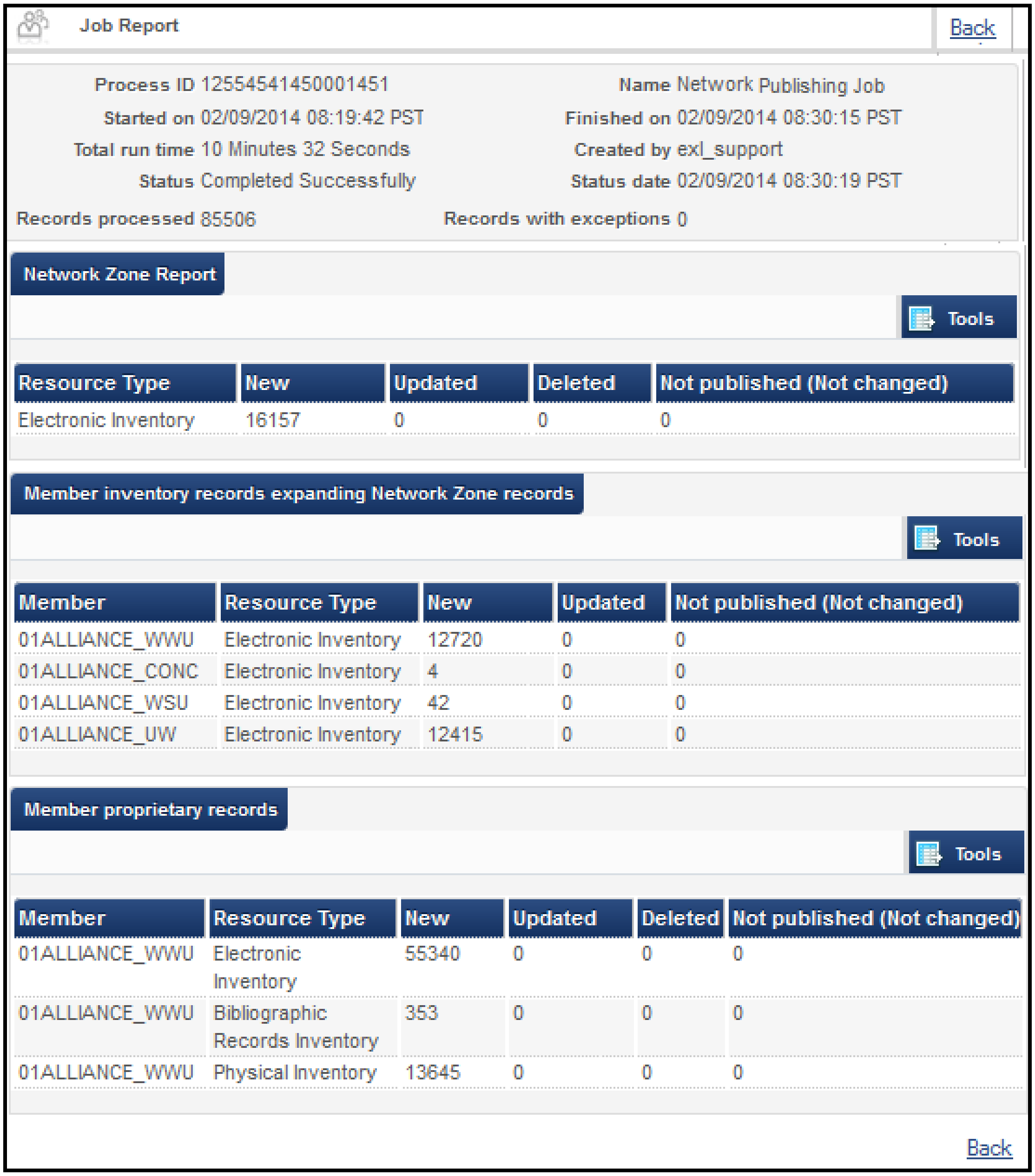
Description

The purpose of this enhancement is to improve the efficiency of publishing bibliographic records from a collaborative network's Network and Institution Zones to Primo.

The report results from running the publishing job, **Publish bibliographic records from Network Zone to Primo**, which also appears as the **Network Publishing Job**. The report includes three tables that contain the following counts:

- For the NZ, the number of New, Updated, Deleted, and Not Published (not changed) records for each resource type. (Electronic Inventory and Bibliographic Records Inventory are currently the types supported).
- For each institution, the number of records (filtered by type and status) that are linked to the NZ and used to enrich the NZ's bibliographic records.
- The number of each member's proprietary records (not linked to the NZ), per resource type, that are New, Updated, Deleted, and Not Published (not changed).

The report resembles the figure below, though it will typically contain higher numbers in the Updated, Deleted, and Not Published columns.



Job Report

Back

Process ID 1255454145000145 1
Name Network Publishing Job
Started on 02/09/2014 08:19:42 PST
Finished on 02/09/2014 08:30:15 PST
Total run time 10 Minutes 32 Seconds
Created by exl_support
Status Completed Successfully
Status date 02/09/2014 08:30:19 PST
Records processed 85506
Records with exceptions 0

Network Zone Report

Tools

Resource Type	New	Updated	Deleted	Not published (Not changed)
Electronic Inventory	16157	0	0	0

Member inventory records expanding Network Zone records

Tools

Member	Resource Type	New	Updated	Not published (Not changed)
01ALLIANCE_WWU	Electronic Inventory	12720	0	0
01ALLIANCE_CONC	Electronic Inventory	4	0	0
01ALLIANCE_WSU	Electronic Inventory	42	0	0
01ALLIANCE_UW	Electronic Inventory	12415	0	0

Member proprietary records

Tools

Member	Resource Type	New	Updated	Deleted	Not published (Not changed)
01ALLIANCE_WWU	Electronic Inventory	55340	0	0	0
01ALLIANCE_WWU	Bibliographic Records Inventory	353	0	0	0
01ALLIANCE_WWU	Physical Inventory	13645	0	0	0

Back

Figure 78 - Report for Network Publishing Job

Technical Instructions

The following roles can access this report:

- Inventory Operator (Digital, Electronic, or Physical)
- Cataloger
- Repository Manager

To access the report after running the publishing job:

1. On the Monitor Jobs page (Administration > Manage Jobs > Monitor Jobs), click the Completed tab.
2. Find the publishing job, **Publish bibliographic records from Network Zone to Primo** (also called **Network Publishing Job**), in the list of jobs. If necessary, use the search (**Find**) and filter (by job type) tools to narrow your search.

Note: If you do not see the job in the **Completed** tab list, check the **Running** jobs tab to determine whether the job is still running. Wait for it to finish before performing these steps.

3. When you find the completed job, select **Actions > Report** in its row.

Support Services for Related Records in the Get It Tab

Description

The Get It tab now displays services for related records whose relationship is defined in the Network Zone. (If the Alma Resolver does not find a record match in the Institution Zone, it searches for matches in the NZ. If it finds a match in the NZ and that match has related records, the Alma Resolver searches the IZ for the record that links to the related record found in the NZ.)

Other Collaborative Network Enhancements

- The **Language**, **Medium type**, and **Record number** fields have been added to the All Titles Network Zone search results page.

Alma Interface Updates

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

Excel Export Limit

Description

This enhancement limits the amount of information that can be exported to an Excel spreadsheet, ensuring that the online export from lists can complete in a reasonable amount of time.

Technical Instructions

You can export information to an Excel spreadsheet from the **Tools** button on many pages in Alma, such as the list of results from a repository search, and the lists of users, PO lines, and sets. There is now a limit to how much information can be exported at one time to Excel. If the amount of information to be exported exceeds the limit, the **Excel** link is grayed out and a tooltip is displayed that indicates the limit. For example:

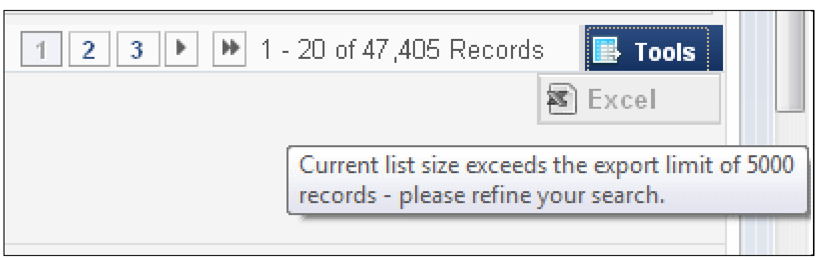


Figure 79 – Excel Export Limit

To export the list, filter the list to be under the limit.

Known Issues

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

For details, you can read the following:

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

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

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